



eMACS
ELECTRONIC MONTANA ACQUISITION
& CONTRACTING SYSTEM

ACCESSING EMACS

**New User Guide to
Accessing eMACS**

-

State Agencies

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1. INTRODUCTION

Information provided here will assist first-time State users in accessing eMACS' Production and Test environments.

eMACS is accessed via ePass Montana. ePass Montana is maintained by the Department of Administration, State Information Technology Services Division (SITSD). Should you experience any issues with ePass contact SITSD at 444-2000 or contact Montana Interactive at 406-449-3468.

There are two types of registration processes for providing first-time State users access to eMACS.

1. One process is for State users within State of Montana's network,
2. The other for State users outside the State of Montana network.

Follow only ONE registration process when registering. Most users will register following the process for State users within the State's network.

Note: If you are unsure which processes to use contact the eMACS Support Unit (emacs@mt.gov or 406-444-2575).

2. RESOURCES

- eMACS Resources website: <http://spb.mt.gov/emacs-resources>
- eMACS Support Unit email: emacs@mt.gov
- eMACS Support Unit phone number: 406-444-2575

3. REQUESTING USER ACCESS TO EMACS

3.1 - NEW USERS

Prior to a new user accessing eMACS, the user's State Agency Procurement Contact must send a notification to the eMACS Support Unit. The steps below outline the process for requesting new user access.

1. Requests to add a new user must come from the agency's [Procurement Contact](#) via [ServiceNow](#).
2. Request must include the new user's name and the role(s) needed for that user. Role descriptions are provided in this manual: Section 4.1 - Role Descriptions.
3. After the request has been received, the eMACS Support Unit will contact the new user with instructions to assist in the registration process, if needed.
4. **Sourcing Director / Total Contract Manager (TCM) Roles/Access:**

New users can be set up in eMACS. Using this process allows eMACS Support Unit to keep errors to a minimum and provide a truly accurate system.

- **PRODUCTION:** temporary view-only access will be given. The new user can view vendors, events, and contracts.

RECOMMENDED: Prior to working in Production, new users should have attended procurement-related and eMACS training.

- Procurement-related training is provided by the [State Procurement Bureau](#).

Once the new user has received sufficient training and is proficient in the module processes, the Procurement Contact will contact eMACS Support Unit (emacs@mt.gov) to activate the requested roles in the Production environment.

5. **Shopping Roles/Access:**
 - a. **PRODUCTION:** new users will be set up using the requested Shopper or Buyer role.

3.2 - INACTIVATING EMACS USERS

1. When users no longer need access to eMACS, the agency's [Procurement Contact](#) will send an inactivation request via [ServiceNow](#).
2. Request must include the user's name and "C" number.
3. eMACS Support Unit will inactivate the eMACS user's access. User's name will still appear in eMACS but with an (I) in front of their name.

4. ROLES

eMACS requires users be assigned a **role**. Multiple roles can be assigned to a user.

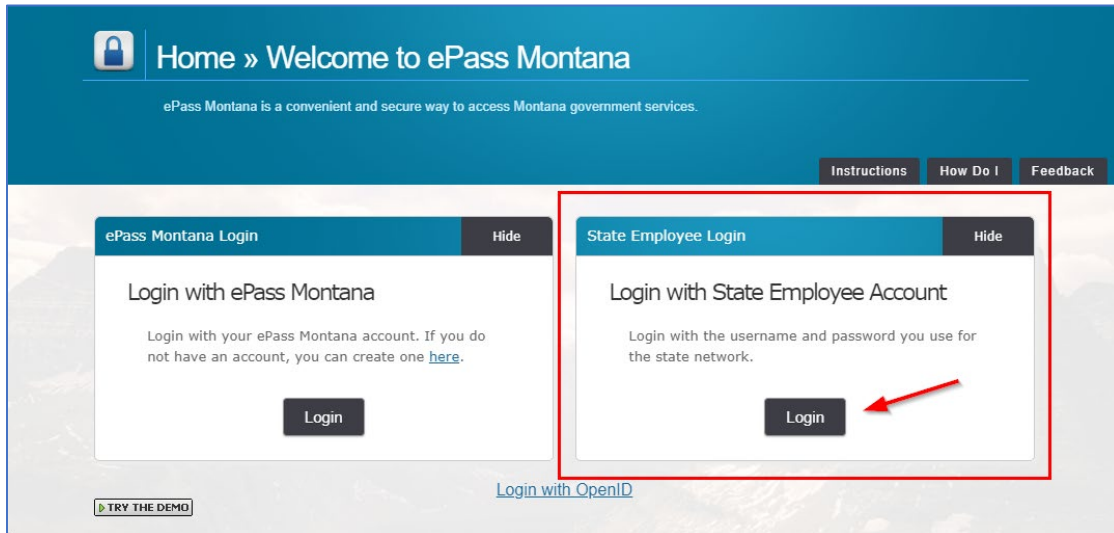
ROLE DESCRIPTIONS		
Module	Role	Role Description
Sourcing Director	APO Role- No TCM Implemented	This role is assigned to the agency's Agency Procurement Official listed in the agency's delegation agreement only. Contact eMACS (emacs@mt.gov) for further information.
	Sourcing Team (Stakeholder)	A Sourcing Team role can create, edit, and view all events created within the work group. Stakeholders have view-only access to events and receive event notifications. Users can be set up for view-only access to all agency events or to specific ones.
	Approver	This role is assigned to the agency Director or designee to approve solicitation requests in the Agency Director Approval step in the Solicitation Request form workflow. Designee must be listed in agency's delegation agreement. Contact eMACS (emacs@mt.gov) for further information.
	Requisitioner	This role is assigned to users with authority to complete, submit, and in some cases, approve a Solicitation Request form. Users must be listed in the agency's delegation agreement. Contact eMACS (emacs@mt.gov) for further information.
	Agency Contract Officer-No TCM Implemented	Allows access to solicitations, forms, vendor profiles, approval workflows, templates, and a shopper role in shopping.
Total Contract Manager	APO Role- TCM Implemented	This role is assigned to the agency's Agency Procurement Official listed in the agency's delegation agreement only. Contact eMACS (emacs@mt.gov) for further information.
	Agency Contract Officer	Allows access to solicitations, contracts, forms, vendor profiles, approval workflows, templates, and a shopper role in shopping. Users with this role can create and manage only their own contracts. They may view other users' contracts where the other owners have granted non-owners Full or Partial visibility. They may also view reports based on the same limitations.
	Agency Contract Manager	Assigned to the Agency Contract Officer of agency using TCM. Allows access to contracts, forms, and vendor profiles.
Shopping	eMarketPlace Shopper	Shoppers are typically allowed to shop, but cannot place an order, and instead assign a cart to a Buyer.
	eMarketPlace Buyer	Buyers can shop and submit their own cart which requires a State PCard as well as reject or approve carts assigned to them.

5. ACCESSING EMACS – PRODUCTION ENVIRONMENT

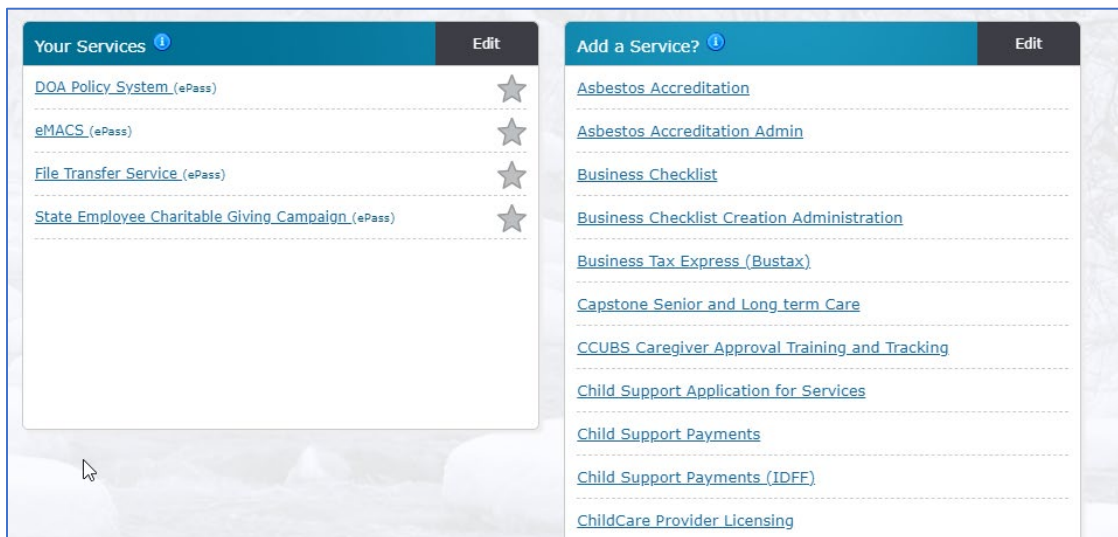
5.1 - STATE USERS WITHIN STATE OF MONTANA NETWORK

Access [ePass Montana's Production](#) environment:

1. Click the **Login** button under **Login with State Employee Account**.

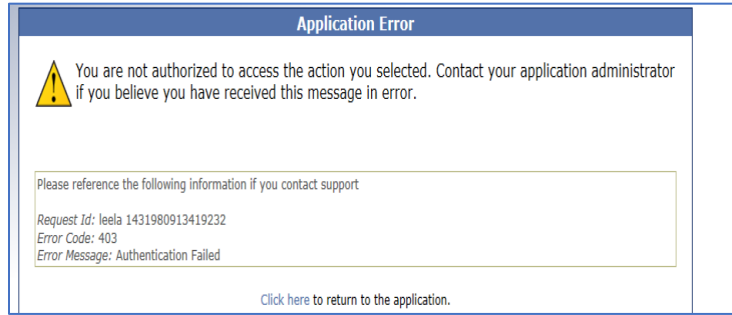


2. Enter your **"C" number** and **password** associated with that number (same info used to access your desktop computer).
3. Scroll down to **Add a Service?**, click on **eMACS (ePass)**.



NOTE: after the initial login, **eMACS** will be found under **Your Services**.

4. You will receive the error below which sends your registration request to the eMACS Support Unit for approval/denial. You will receive an **email from Sciquest.com** stating approval or denial of your registration.



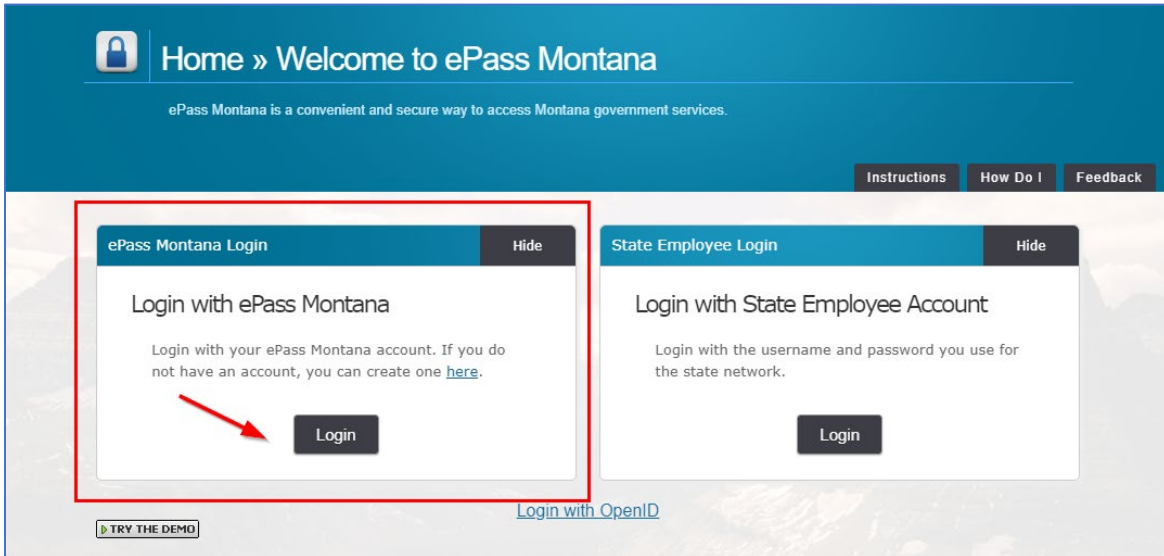
NOTE: If your registration is denied and you have questions contact the [eMACS Support Unit](#).

5. If your registration is approved, log in to eMACS and complete your User Profile **prior** to doing any shopping or work. Follow the steps listed in **Section 6.1, Completing a New User Profile**.

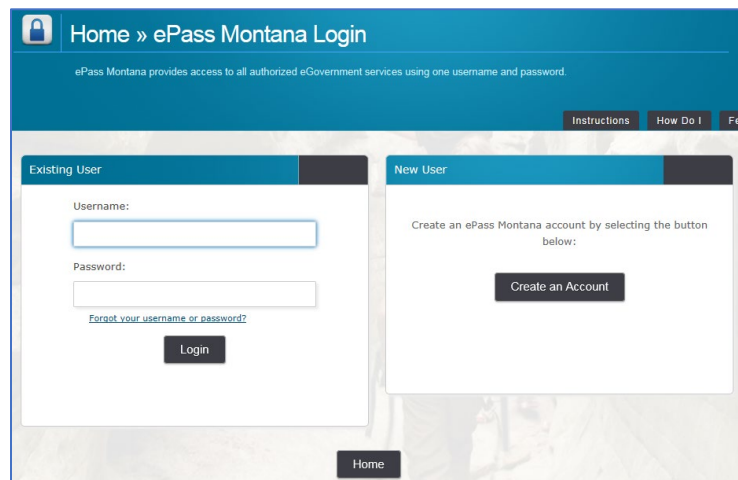
5.2 - USERS OUTSIDE STATE OF MONTANA NETWORK

Access [ePass Montana's Production](#) environment:

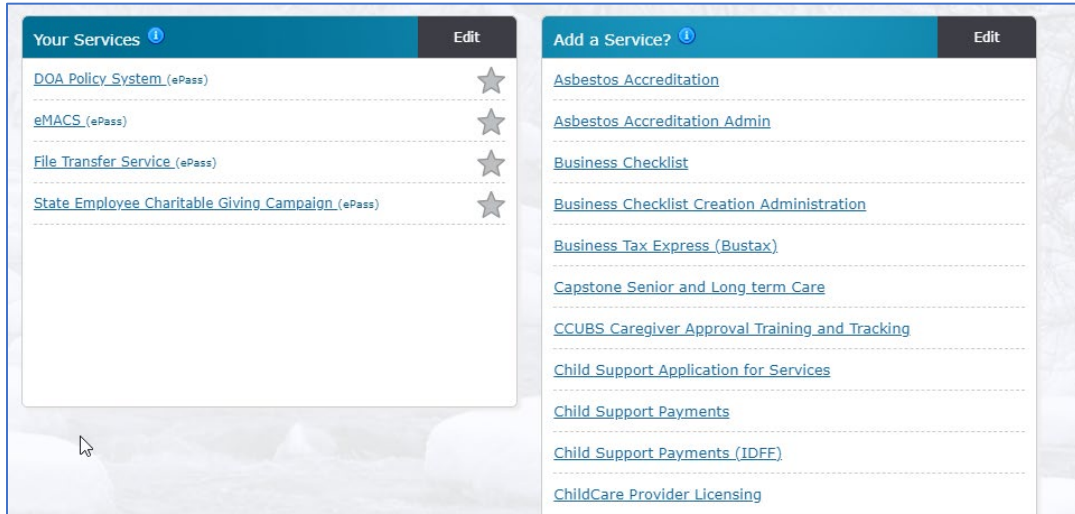
1. Click the **Login** button under **Login with ePass Montana**.



You will be directed to the following screen.

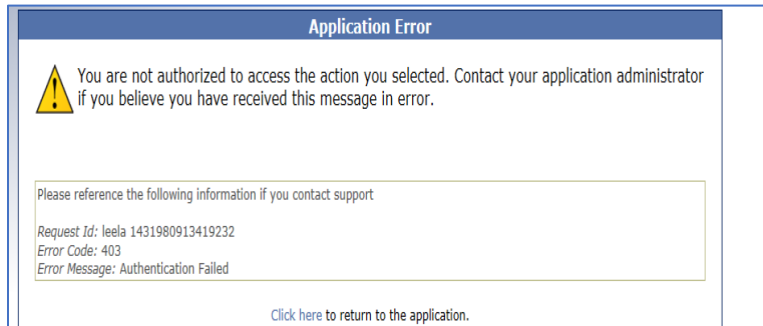


2. Click on **Create an Account** under the **New User** section. Complete all required fields to create your ePass account.
3. Return to the [ePass home page](#) and login.
4. Scroll down to **Add a Service?**; click on **eMACS (ePass)**.



NOTE: after the initial login, **eMACS** will be found under **Your Services**.

5. You will receive the error below which sends your registration request to the eMACS Support Unit for approval/denial. You will receive an **email from Sciquest.com** stating approval or denial of your registration.



Note: If your registration is denied and you have questions contact the [eMACS Support Unit](#).

7. If your registration is approved, log in to eMACS and complete your User Profile **prior** to doing any shopping or work. Follow the steps listed in **Section 6.1, Completing a New User Profile**.

6. USER PROFILES

The User Profile captures eMACS user information such as name, phone number, e-mail address, Ship To/Bill To addresses, PCard, etc., as well as access, security, and user permissions. Users must keep their User Profile current as incorrect information can affect shopping experiences, system notifications, etc., depending on which modules are used.

6.1 - COMPLETING A NEW USER PROFILE

New users should complete their User Profile **PRIOR** to doing any shopping or work in eMACS.

1. Users accessing eMACS for the first time will immediately see their User Profile. Review information on the **User's Name, Phone Number, Email, etc.** page. If default information (information that cannot be changed by the user) is incorrect, user's Agency Procurement Officer or Single Point of Contact must contact the [eMACS Support Unit](#) with a request to correct that information.
 - a. Following the noted format, enter Phone Number. Click **Save**.
2. In the Profile menu to the left, click on **Default User Settings > Default Addresses**. Ship To and Bill To addresses must be entered.

Ship To Address

- a. Click on the **Ship To** tab, then on **Select Addresses for Profile**. Search for and select the applicable Ship To address by clicking on the down arrow next to **Select Address Template**. If the correct address is not available, user's Agency Procurement Officer or Single Point of Contact must contact the [eMACS Support Unit](#) with a request to add the address.
- b. Add additional information in the ORGANIZATION and ROOM/FLOOR/SUITE fields, if applicable.
- c. Optional, revise address **Nickname**.
- d. Click **Save**.

Bill To Address

- b. Click on the **Bill To** tab, then on **Select Addresses for Profile**.
- c. Click on down arrow next to **Select Address Template**, select **Bill To**. Complete **Bill To** fields.
- d. Click **Save**.

Billing Information - PCard Information (if applicable)

This information is added if you are in the **Buyer role**.

Note: Make sure to check when completing an order, that this information is carrying over to the Billing Information.

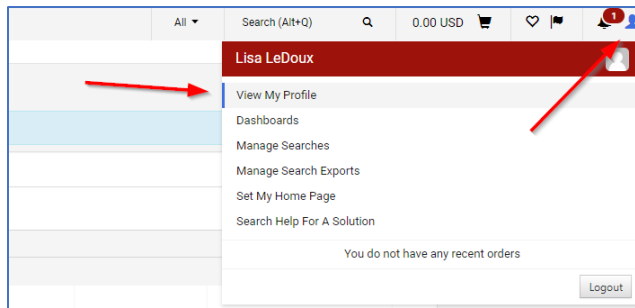
- e. **Under Default User Settings > Click Payment Options.**
- b. Enter Credit Card information. Make sure your default card is marked as **Default**, and the **Apply the Default Card** button is selected.

6.2 - UPDATING A USER PROFILE

Occasionally users need to update their User Profile information. The most common areas eMACS users update are Default Addresses (Ship To/Bill To) and Payment Options (PCard information). Contact eMACS Support Unit when new addresses must be created.

How to update these areas is outlined below:

1. Access eMACS.
2. Click on the person icon in the top right banner, select **View My Profile**.



3. In the Profile menu to the left, click on **Default User Settings > Default Addresses**.

Ship To Address

Add New Address:

- a. Click on the **Ship To** tab, then **Select Addresses for Profile**. Search for and select the applicable Ship To address by clicking on the down arrow next to **Select Address Template**. If the correct address is not available, user's Agency Procurement Officer or Single Point of Contact must contact the eMACS Support Unit with a request to add the address (emacs@mt.gov).
- b. Add additional information in the ORGANIZATION and ROOM/FLOOR/SUITE fields, if applicable.
- c. Optional, revise address **Nickname**.
- d. Click **Save**.

Delete Address:

- a. Click on the **Ship To** tab. On the left side of the Ship To window click on the address to be deleted.
- b. Click on Delete Address.

Bill To Address

Add New Address:

- a. Click on the **Bill To** tab, then **Select Addresses for Profile**. Click on down arrow next to **Select Address Template**, select **Bill To**.
- b., Complete Bill To fields.
- b. Click **Save**.

Delete Address:

- a. Click on the **Bill To** tab. On the left side of the Bill To window, click on the address to be deleted.
- b. Click on Delete Address.

Billing Information: (PCard Information if applicable)

- a. Click **Payment Options**.
- b. Enter Credit Card information. Make sure the **Apply the Default Card** and **Default Card** boxes are checked.

Payment Options 0

Apply the default card. 1

[Add a New Card](#) 2

My Cards

Card Details ?

Name this card (e.g. My Visa)

Cardholder Name

Card Number

Expiration Date

Default card 3

7. SOURCING TEAM (Stakeholders)

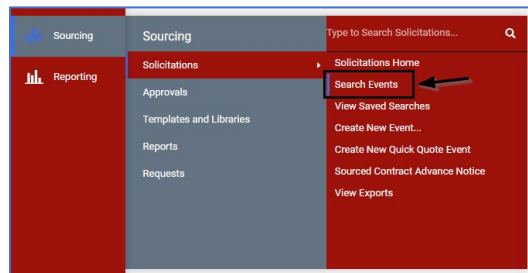
Users assigned the Stakeholder role are given view-only access to events and/or contracts in their agency. Stakeholders receive system notifications sent out regarding events or contracts they are assigned to. Stakeholders can be set up to access **all** events and/or contracts created by their agency or be selected for specific events or contracts applicable to them.

New users will access eMACS using one of the processes mentioned previously. Follow the steps below to search for and find the event or contract to review.

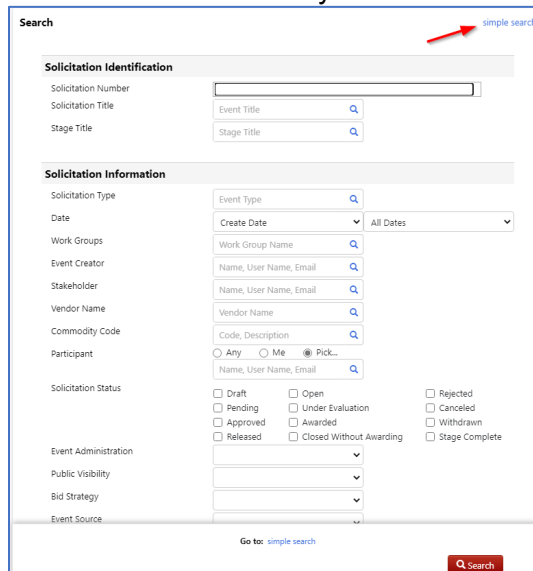
The contract officer/manager will need to add the person to the event or contract in order for the Sourcing Team member to view the record.

7.1 - SEARCH FOR EVENTS – SOURCING DIRECTOR

1. Access eMACS.
2. Click on **Sourcing > Solicitations > Search Event**



3. Search for an event.
 - Use the **Simple Search** to find events by an Event Number or Event Title.



- Select the **Advanced Search** options to see additional criteria for finding a sourcing event:
 - Sourcing Event Identification - Search by event number or event title.
 - Sourcing Event Information - Search by Event Type, a specific date type and criteria, Supplier Name, commodity codes, event status and more.
4. Click on the event title. The system will open the event to display **Vendor Responses**.
5. View vendor response by clicking on **View Response**.

20.1 Testing 1234
DOA-IFB-2020-0111-LJH

Type: **Invitation For Bid**
Event Status: **Under Evaluation**

Settings and Content >

Evaluations ▾

Vendor Responses

Tools >

Vendor Responses Event Actions History ?

Evaluation Actions ▾

6 Invited Vendors Evaluate Selected Responses

1-6 of 6 Results 50 Per Page ▾

Progress ▲	Response % Complete ▲	Vendor Name ▲	Total Bid ▲	
Submitted	100%	Justin's Foots	0.00 USD	<input type="checkbox"/> View Response ▾
Submitted	100%	Tom SABHRS 1	0.00 USD	<input type="checkbox"/> View Response ▾
Event Not Viewed	-	Tom Hastings 1	-	<input type="checkbox"/>
Event Not Viewed	-	Tom Hastings 2	-	<input type="checkbox"/>
Event Not Viewed	-	Tom Hastings 3	-	<input type="checkbox"/>
Event Not Viewed	-	Tom's Distributing	-	<input type="checkbox"/>

1-6 of 6 Results 50 Per Page ▾

Save Progress

7.2 - SEARCH FOR CONTRACTS – TOTAL CONTRACT MANAGER

1. Access eMACS.
2. Click on **Contracts > Contracts > Search Contracts**.
3. Search for a contract.
 - Use **Simple Search** when you may not have all the information you need and want to search based on partial information. The system will search all contract fields for each keyword entered, providing you with a broad result set.
 - Use **Advanced Search** when you have exact data or a complex set of values that you want to search for, e.g., you have a contract number, or want to apply multiple search filters to limit the number of search results. The system only returns results that are an exact match to the values entered.
 - Results and access will vary depending on how the contract was set up.