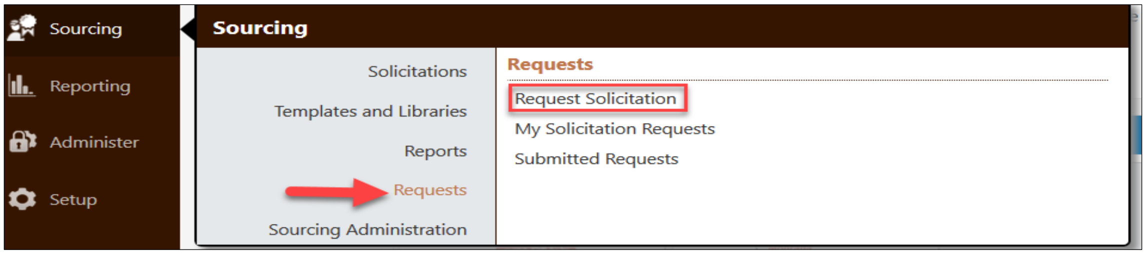
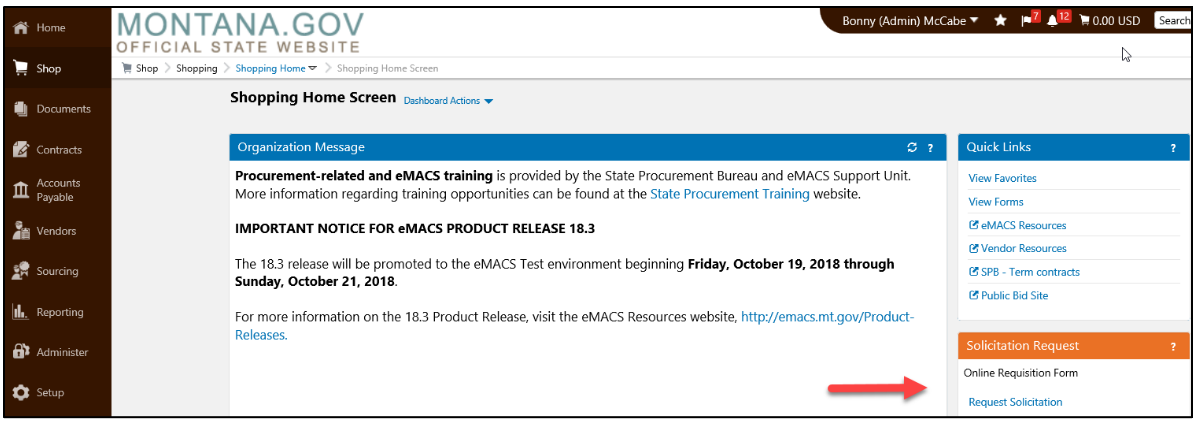
Creating and Submitting a Solicitation Request Form (Requisition Form) in eMACS

NOTE: The **Sourcing Event Requester** permission is required for users to submit sourcing event requests.

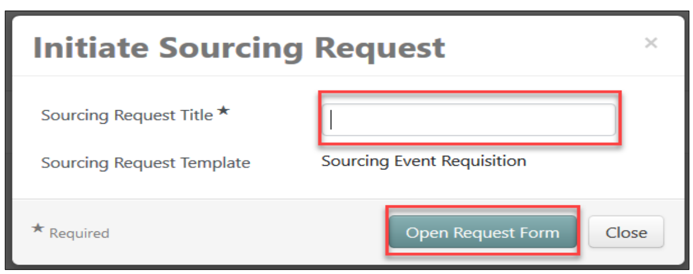
1. Access the Solicitation Request Form. The form can be accessed in two ways in eMACS:
   - Navigate to Sourcing > Requests > Request Solicitation, or



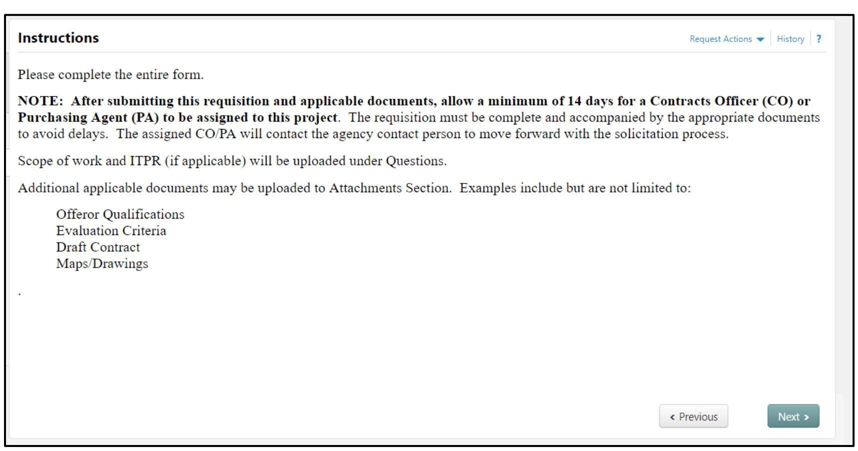
   - By accessing the Solicitation Request Form from the eMACS home page.



2. Enter a Sourcing Request Title. The Sourcing Request Template field auto-populates. Click Open Request Form.

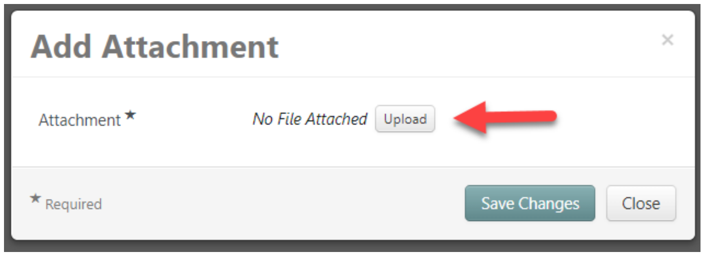


3. Review the Instructions section. Updates to the form will be posted to this section.

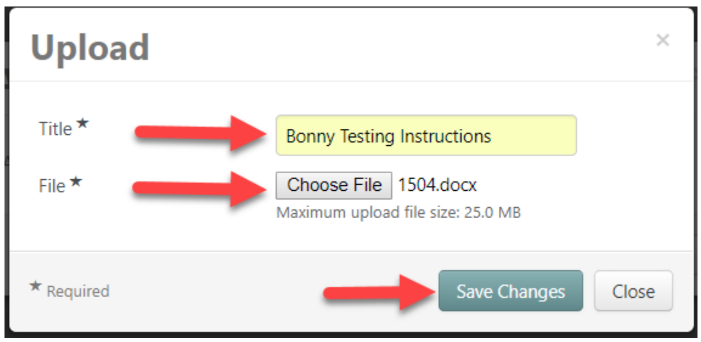


4. In the Attachments section, add attachments by clicking on Add Attachment.

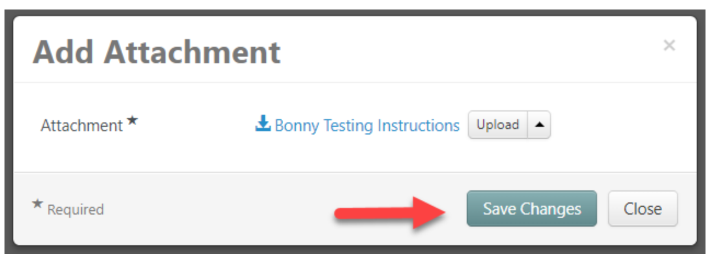
Next, click Upload.



Enter Title. Click Choose File to select file. Click Save Changes.



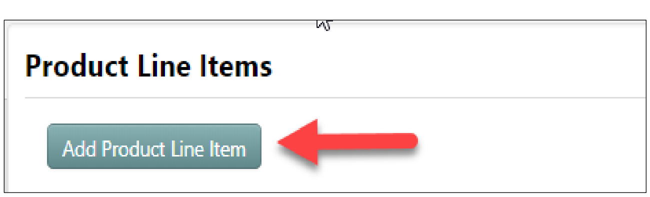
Finally, click Save Changes. After all attachments have been added, at bottom of Attachments section, click Previous, Save Progress, or Next.

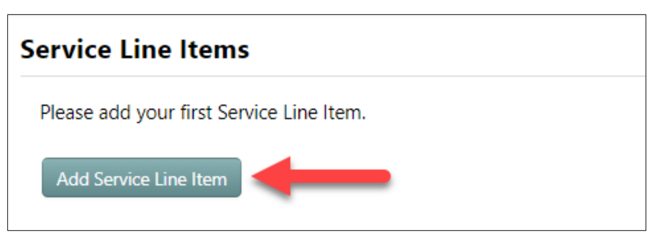


5. Complete the Questions section. Questions with a ★ next to it require a response or form cannot be submitted. After completing the Questions section, click Previous, Save Progress, or Next.

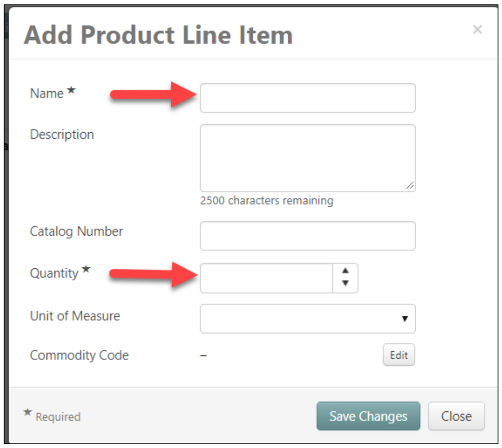
6. In the Product and Service Line Items sections line items are added in the same way. Product Line Items section auto-populates with “Lump Sum” option to help complete the form.

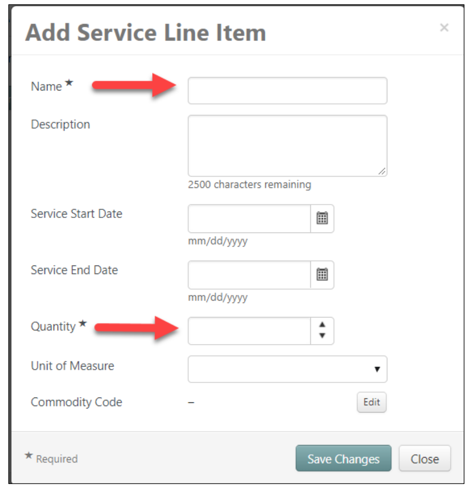
   Add a line item by clicking on Add Product or Service Line Item.





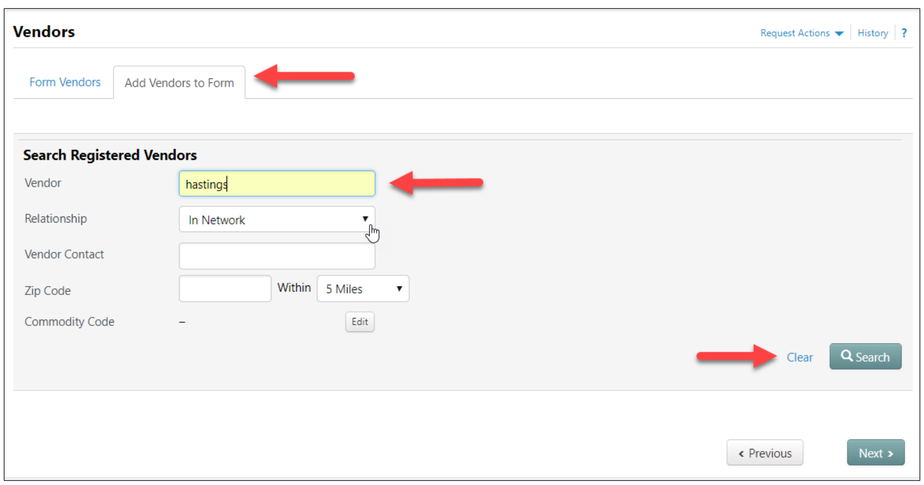
Complete, at a minimum, all required fields for each line item. Click Save Changes. After all line items have been added, click Previous, Save Progress, or Next.



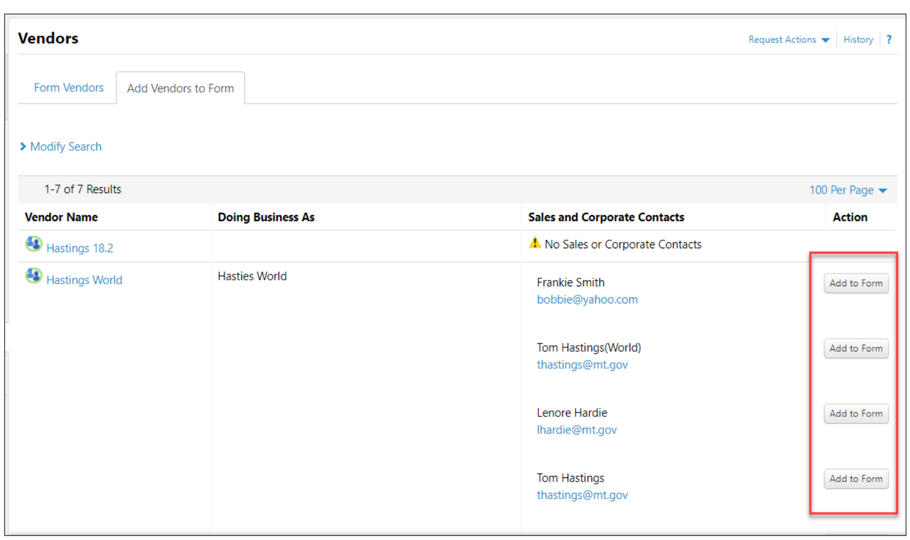


7. Vendors can be added in the Vendors section or added to the pertaining question in the Questions section. For assistance with vendors, contact the eMACS Support Unit, 444-2575 or emacs@mt.gov.

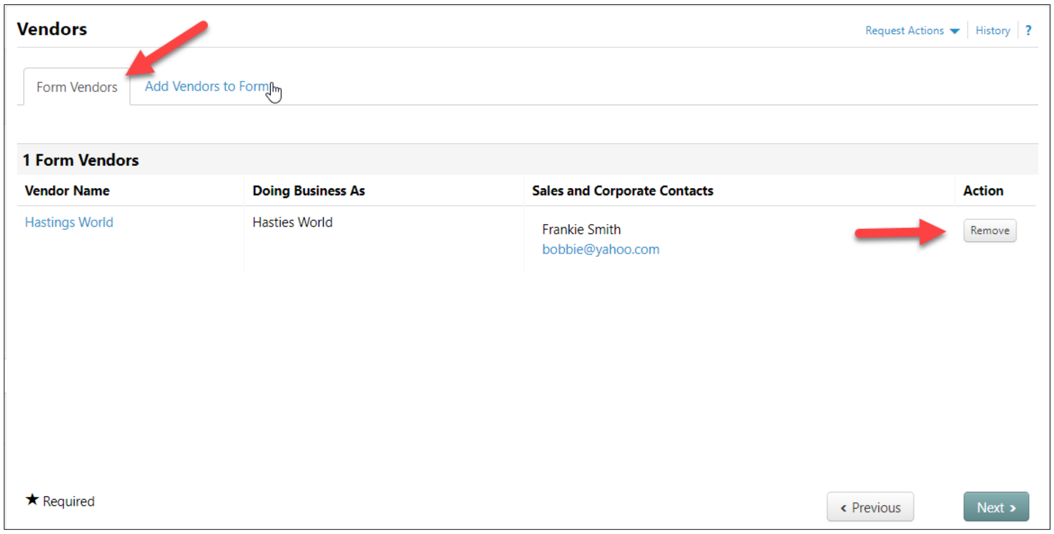
   To add a vendor in the Vendors section, click on the Add Vendors to Form tab. Search for vendor by entering Vendor name and clicking Search.



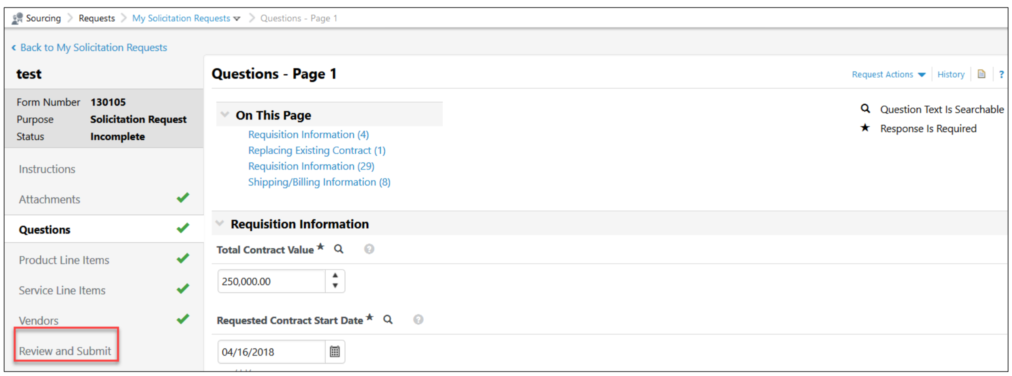
   Review search results. If vendor is in search results, click Add to Form next to applicable contact name for that vendor.



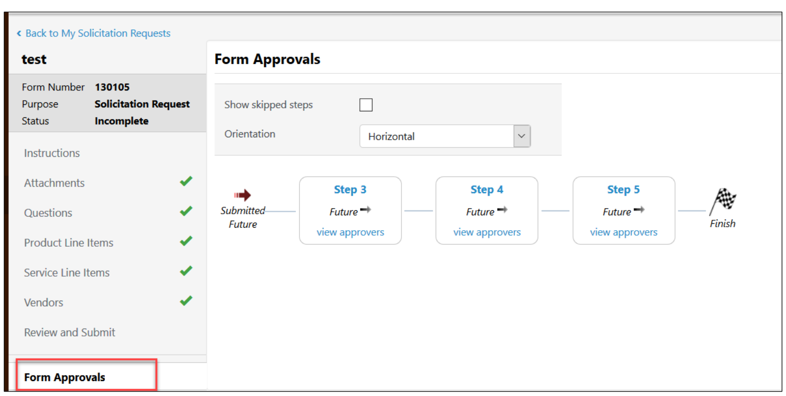
Vendors added to the form can be viewed in the Form Vendors tab. Remove vendor by clicking on Remove. After all vendors have been added, click Previous or Next.



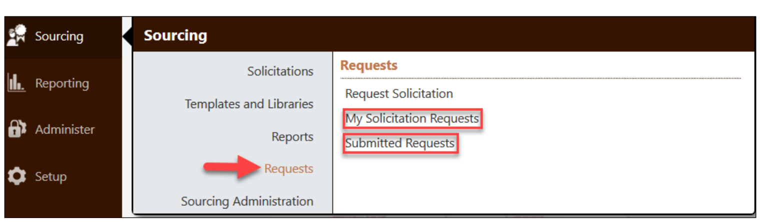
4. When the request form is completed, and all required fields have been answered, navigate to Review and Submit. Click Submit. A request form cannot be submitted until all wizard steps are complete.



Once the request form has been submitted, it enters workflow, where appropriate review and approvals are obtained.



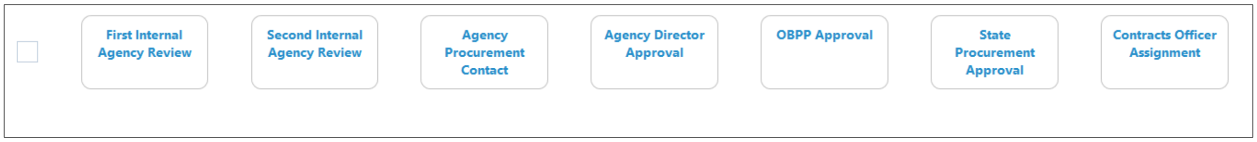
5. To view submitted requests, navigate to Sourcing > Requests > My Solicitation Requests or Submitted Requests.



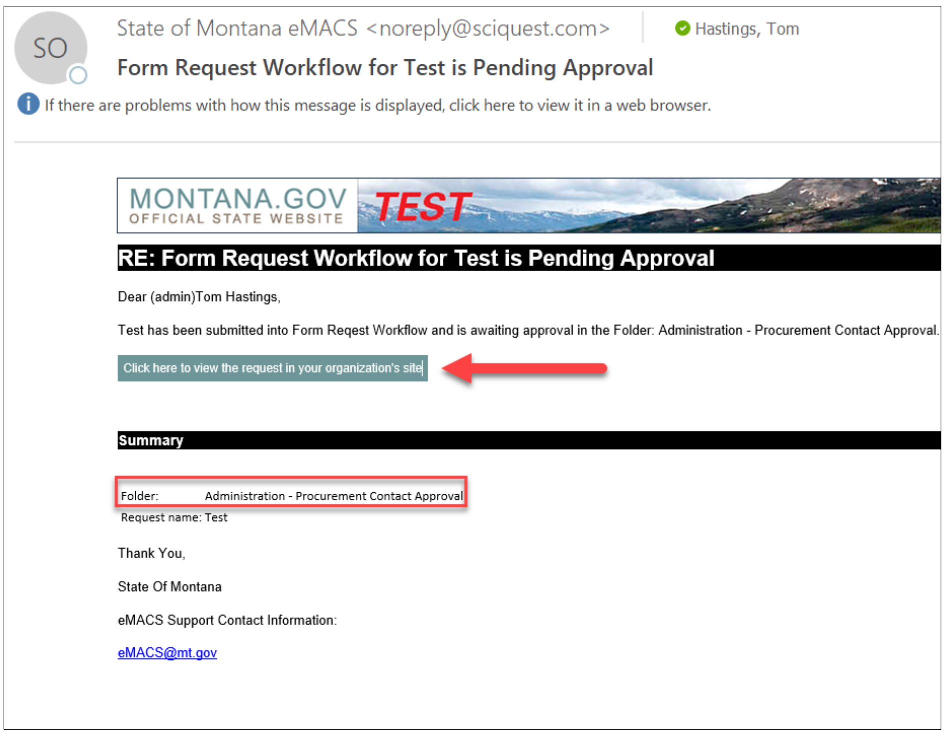
Processing a Solicitation Request Form

Once the Solicitation Request Form has been submitted by the user, it will go through the workflow process. This process provides the necessary reviews and approvals required prior to the creation of a solicitation or contract. The screen shot below shows all available workflow steps for this form. Data entered in the form drives the workflow steps for approvals.

NOTE: This form will ALWAYS stop at the “Agency Procurement Contact” step listed below no matter what users submits the form.



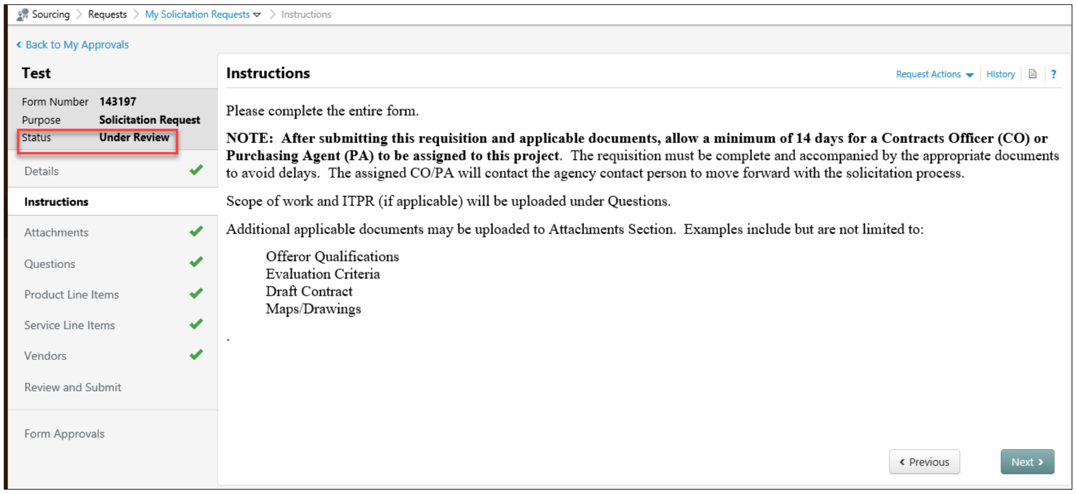
An authorized approver will receive an email notification (as shown below) once the form has reached the workflow step associated with that approver. The name of the workflow step is shown. The approver clicks on the link within the email to access the form and approve it.



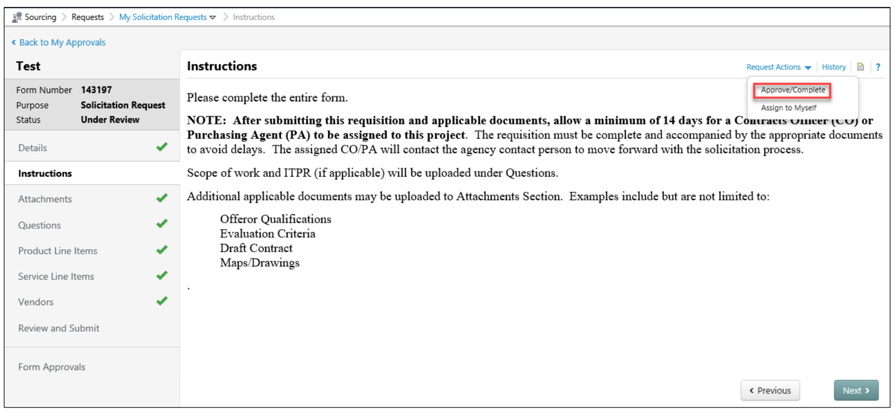
After clicking on the link and entering access information, the approver will arrive in the “My Approvals” section which will display any forms pending approval.

User can also navigate to Documents > Approvals > My Approvals.

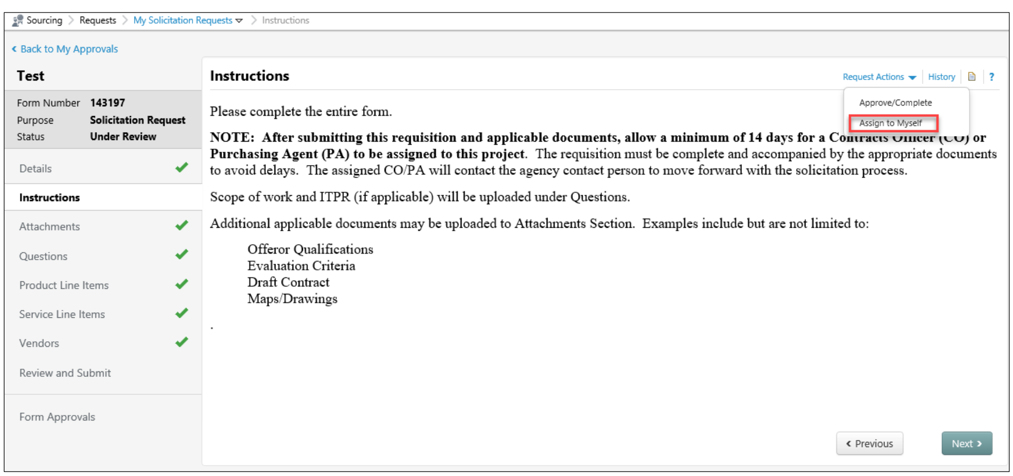
The approver will click on the form Name to access the form. The status of the form will now be “Under Review”.



The approver can access all sections of the form to review data entered for approval. If the form meets all requirements, the approver can “Approve/Complete” this form by selecting that option under “Request Actions” located in upper right-hand corner of screen.



If the approver must deny the form, the form can be sent back to the form creator with a reason why the form was denied. The approver must select the option “Assign to Myself” under “Request Actions” in the upper right-hand area of screen.

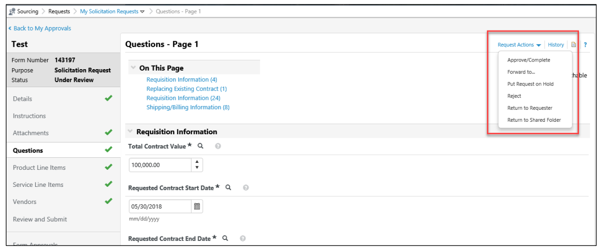


With the screen refreshed, the approver now has new options for this form located under “Request Actions”.

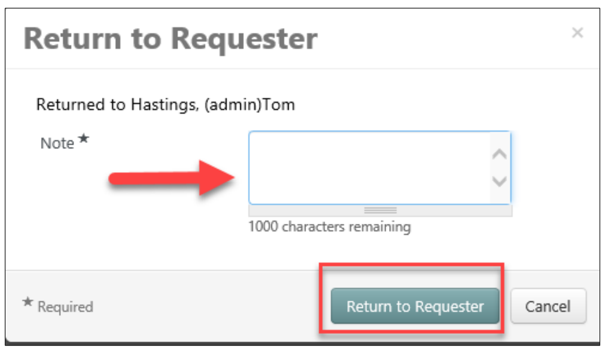
Below are the listed options and reasons for their use:

Note: Options noted with an * are not being used at this time.

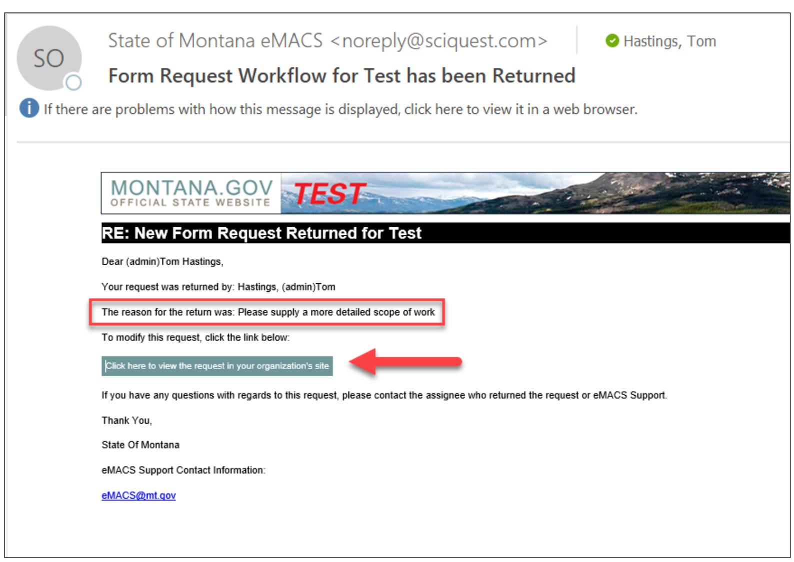
1. Approve/Complete: approves the form and moves it to the next workflow step.
2. Forward to: allows the form to be sent to another approver for their approval.
3. *Put Request on Hold: puts a hold on the form and requires a future approval action.
4. *Reject: rejects the form. The form cannot be reinstated. The form creator will have to start a new form.
5. Return to Requester: sends the form back to the creator. The approver is given an option to enter a reason the form is being returned.
6. Return to Shared Folder: moves the form back to the shared folder and allows an additional approver in that folder to approve the form.

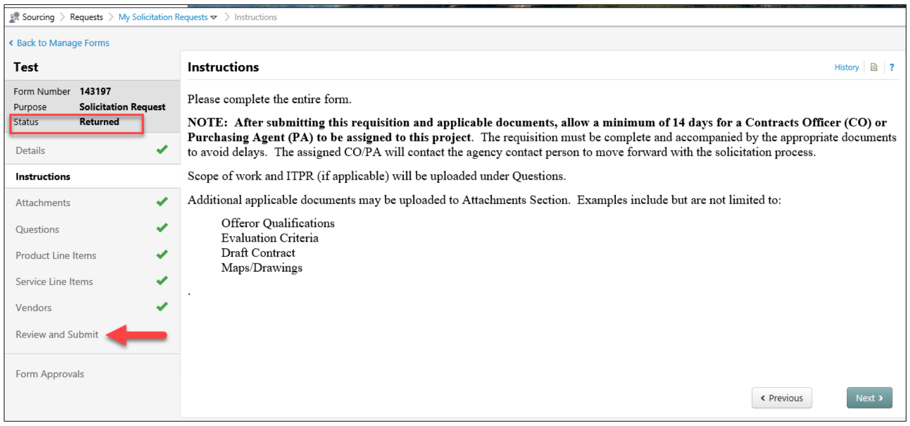


The “Return to Requester” option should be selected to send the form back to the creator. When selecting this option, a wizard window displays asking the approver to enter a note which will appear in an email notification to the form creator. After entering a return reason, click Return to Requester.



Form creator receives an email notification (as shown below) stating the form has been returned to them and the reason for the return. The form creator can click on the link in the email to access the form, make corrections, and resubmit the form.



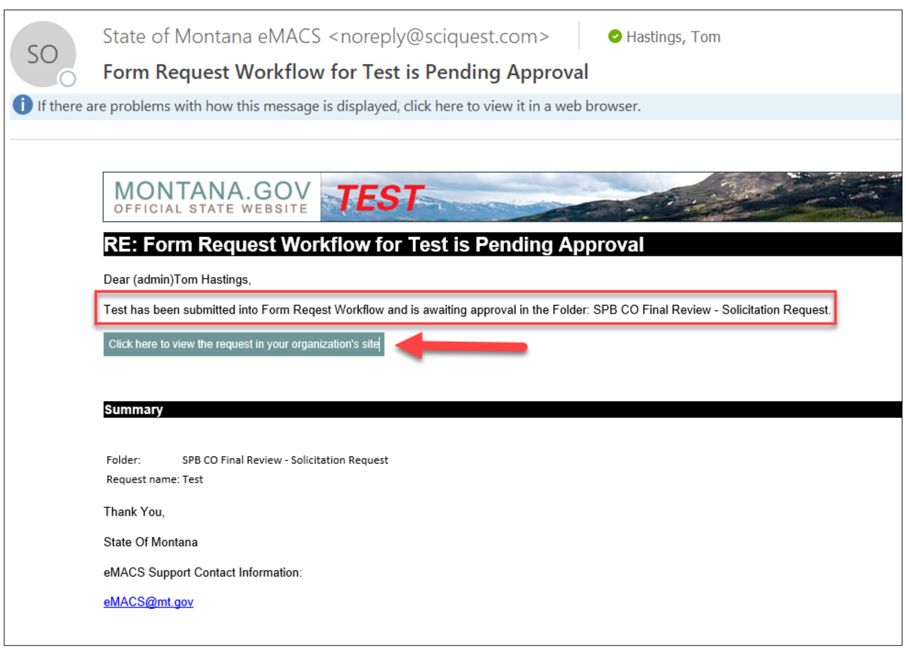


<u>Note:</u> The re-submitted form will start the workflow process with notifications going to each approver in the applicable workflow steps.

Final workflow steps are “State Procurement Approval” and “Contracts Officer Assignment”. Listed below are explanations for these workflow steps:

1. <u>State Procurement Approval</u>: This workflow step allows approvers within the State Procurement Bureau (SPB) to review and approve the form. SPB approvers can return the form to the creator or approve the form prior to assigning it to a Contracts Officer (CO) in SPB.
2. <u>Contracts Officer Assignment</u>: This workflow step allows SPB approvers to assign the form to a Contracts Officer who will create a solicitation.

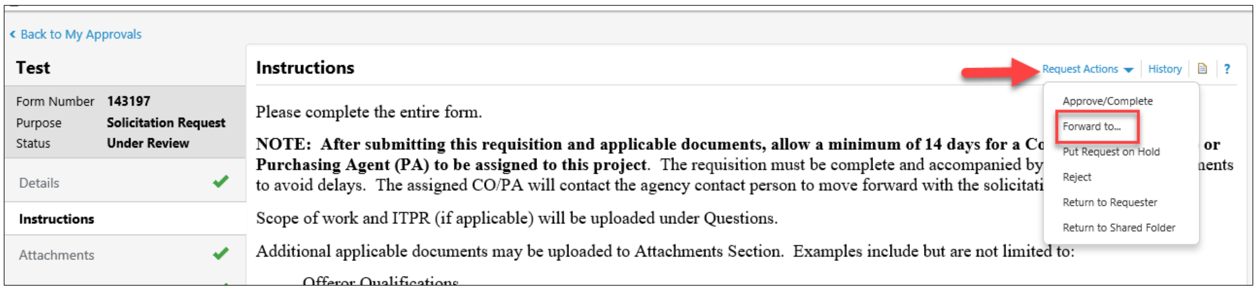
Once this form reaches the Contracts Officer Assignment step in the workflow, an SPB approver receives an email notification as shown below. The SPB approver can do a final review, then assign the form to a Contracts Officer.

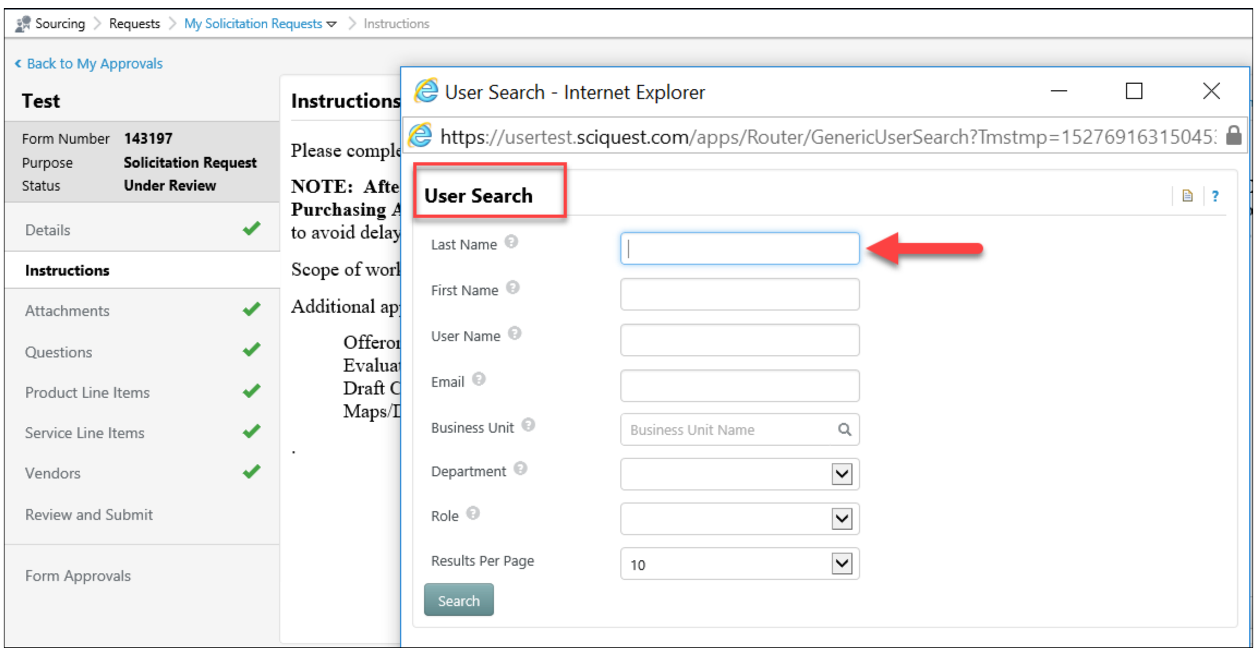


After accessing the form from the email notification, the approver now can assign this form to a Contracts Officer.

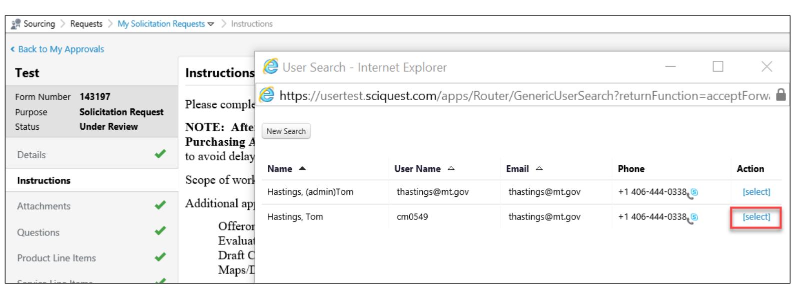
1. Navigate to “Request Actions” in upper right-hand corner. Select Assign to Myself.

2. The screen refreshes and new options appear in this same section. The approver will select Forward to. A User Search wizard appears that can be used to find the Contracts Officer for assignment.

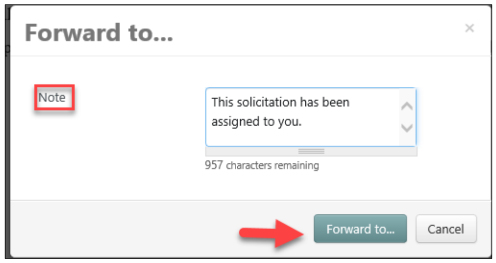




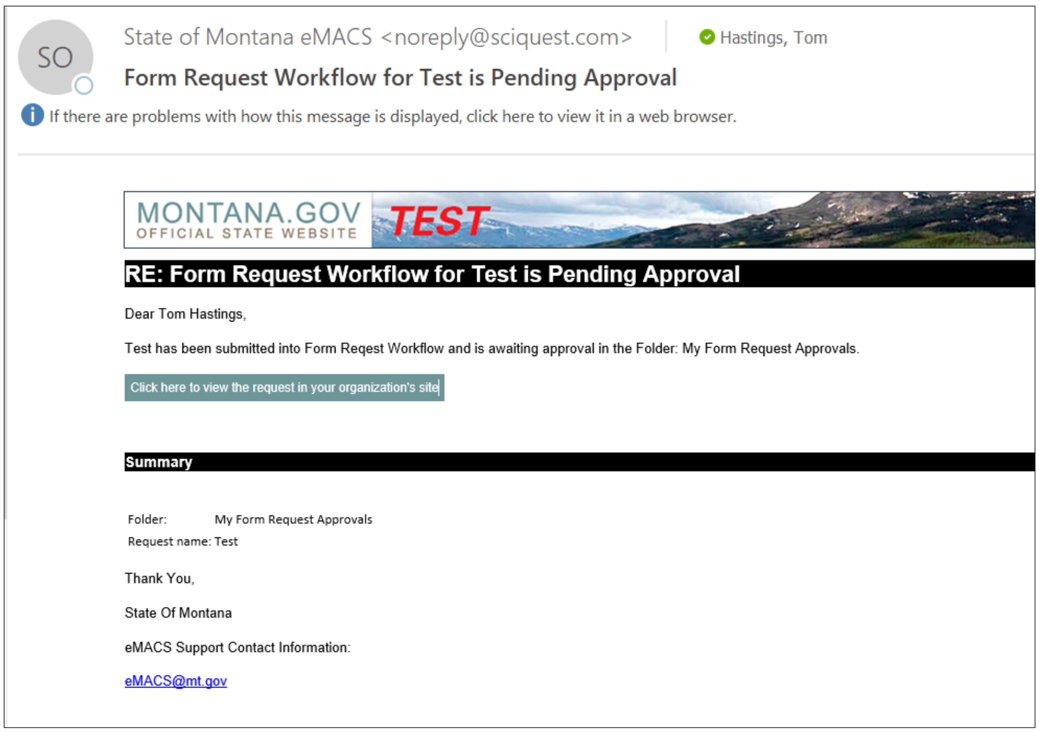
3. After entering search criteria, the approver can select the appropriate user name from the search results.



4. An option to enter a note appears, however, this information only appears in the history of the form. Click Forward to.

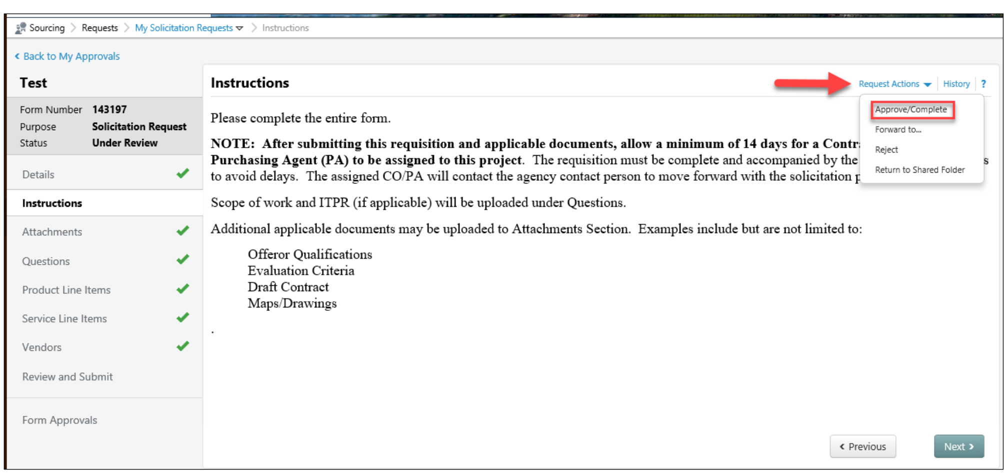


5. Listed below is the email notification the Contracts Officer receives. The form is accessed by clicking on the link supplied.

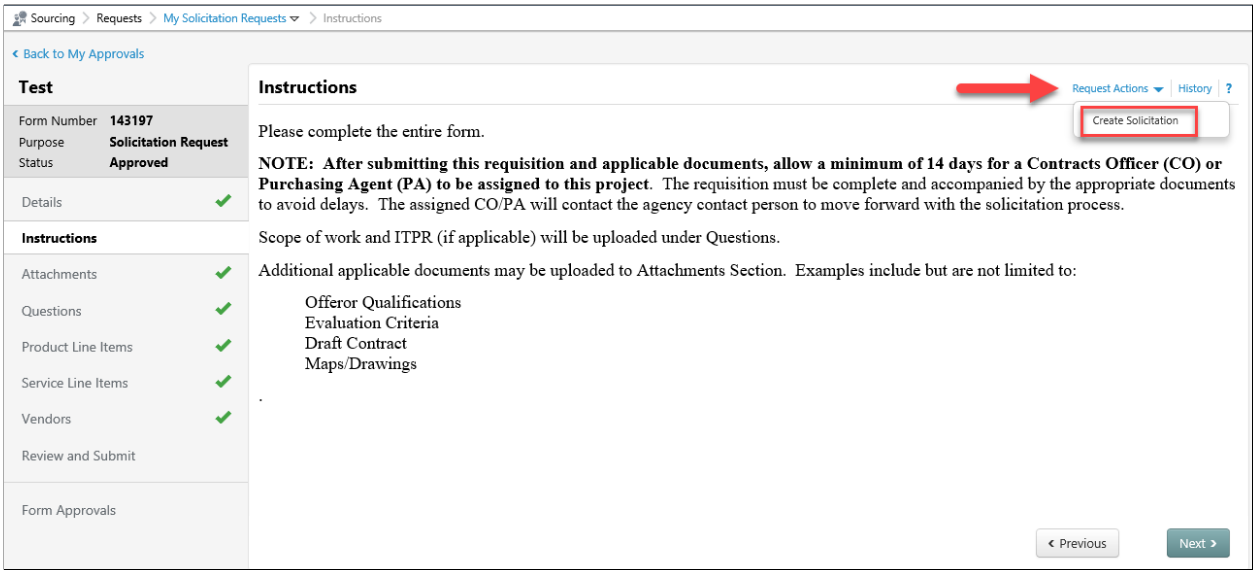


6. After the Contracts Officer accesses the form, a final review should be done on this form for acceptance.

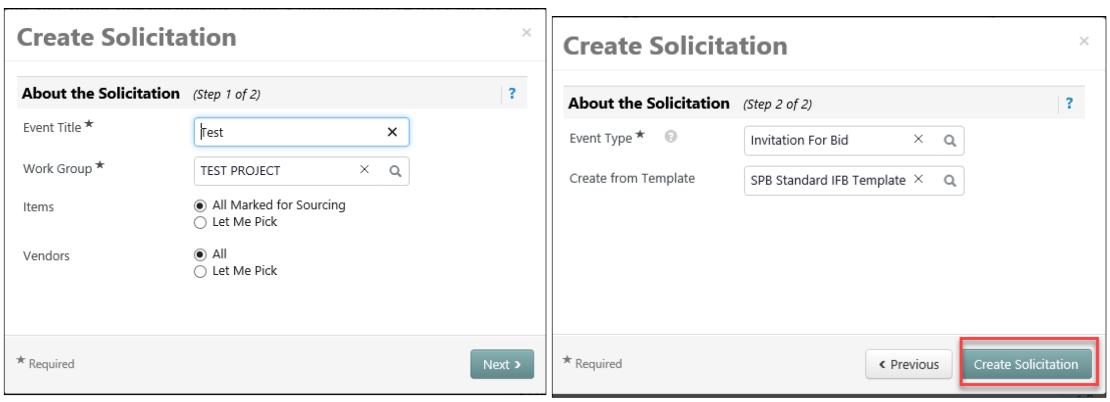
   The CO will approve the form by navigating to Request Actions in upper right corner and clicking on Approve/Complete.



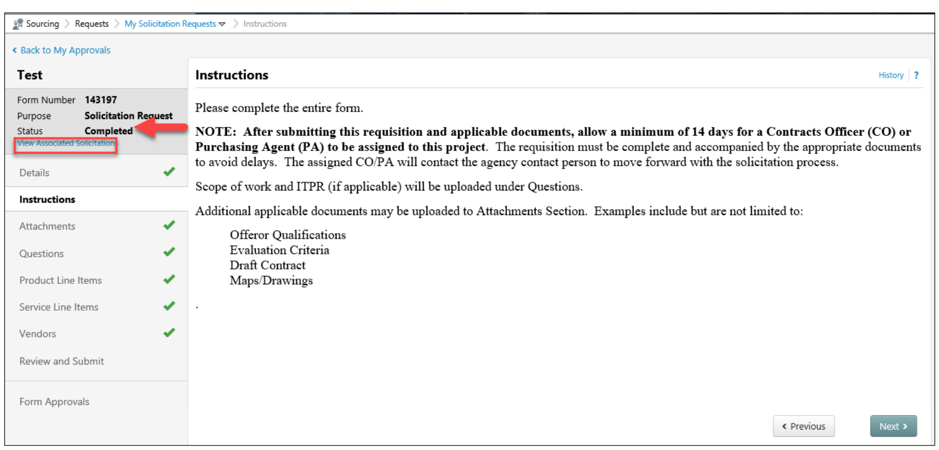
7. After the screen refreshes, the final step is to create the solicitation. Under Request Actions, the CO will select Create Solicitation.



8. A Create Solicitation wizard appears which will be completed by the Contracts Officer.



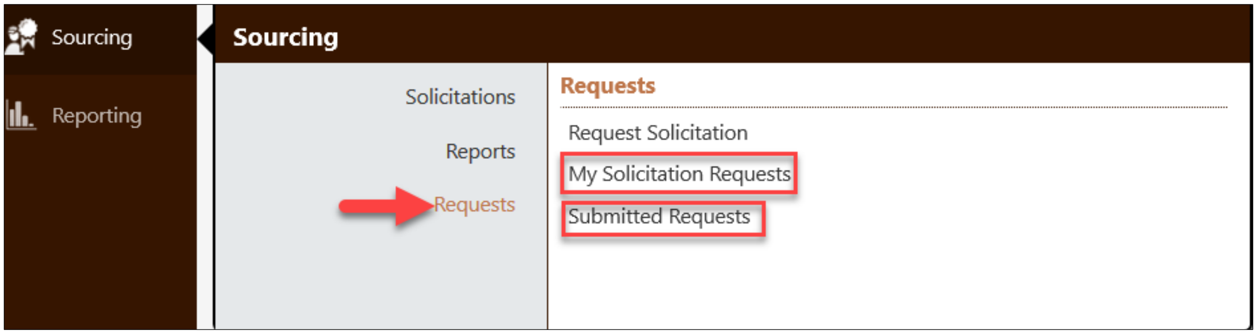
9. The form is now in Completed status. It contains a link to the Solicitation Event. The solicitation event created from the form contains a link back to the form.



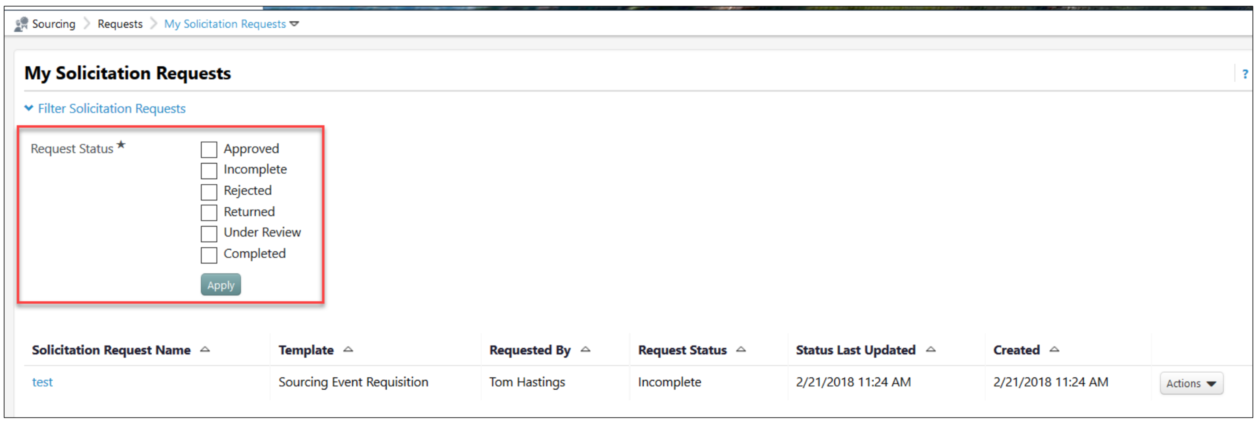
Searching Solicitation Request Form

Users have the ability to search for the Solicitation Request Form after the form has been submitted. This process can be done in the following ways:

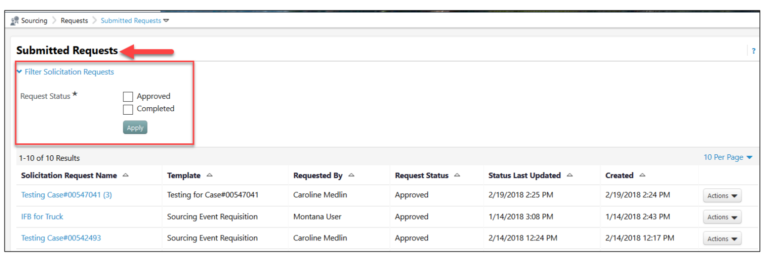
1. Navigate to Sourcing > Requests > My Solicitation Requests: Displays only the user's requests.
2. Navigate to Sourcing > Requests > Submitted Requests: Shows all submitted requests with View access only.



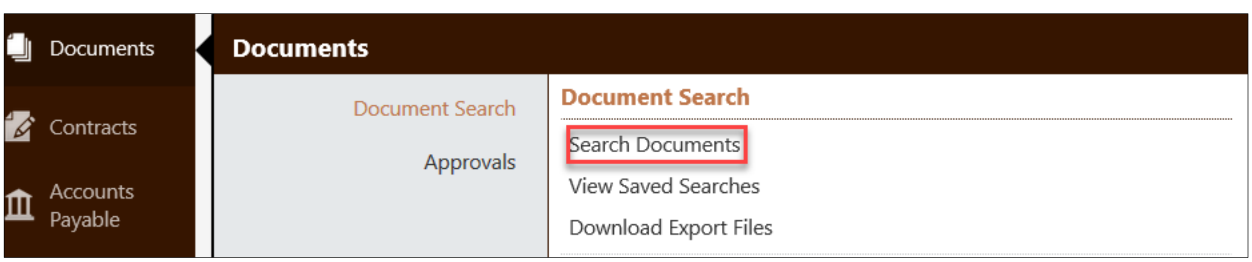
My Solicitation Requests option can be displayed by choosing one or all filtering options.



Submitted Requests option will show all submitted requests in View access only with some filtering options.



3. Navigate to Documents > Document Search > Search Documents.



The Advanced Search screen appears. The user can select the “Form Request” option in the search field and enter any other applicable data to search for a particular form.