



Montana Acquisition & Contracting System (eMACS)

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.

There are two types of registration processes for providing first-time State users access to eMACS. One process is for State users within State of Montana's network, 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.

If in doubt as to which registration process to use, contact the eMACS Support Unit.

2. RESOURCES

eMACS Resources website: <http://emacs.mt.gov/emacsresources>

eMACS Support Unit email: emacs@mt.gov

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 email to emacs@mt.gov.
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.
4. Sourcing Director / Total Contract Manager (TCM) Roles/Access:

New users will be set up in both eMACS environments (Test and Production) as follows. Using this process allows eMACS Support Unit to keep errors to a minimum and provide a truly accurate system.

- a. **Test:** access will be given to the requested Sourcing Director/TCM roles. New users can access the eMACS Test environment through this link, <https://tst.mt.gov/epass/Authn/selectIDP.html>. This link is also in the document, [eMACS Test Site Links](#), found on the eMACS Resources website.
- b. **Production:** temporary view-only access will be given. The new user can view vendors, events, and contracts.

Highly 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, <http://emacs.mt.gov/ProcurementTraining>). 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.
 - b. **Test** No additional testing in the Test environment is required.

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 email to emacs@mt.gov.
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 in *italics font*. User names in *italic font* indicate inactivated users.

4. ROLES

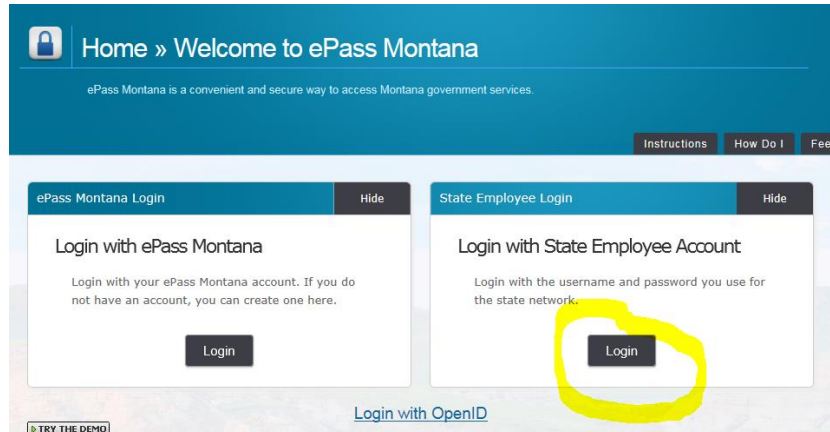
eMACS requires users be assigned a **role**. Multiple roles can be assigned to a user.

ROLE DESCRIPTIONS		
Module	Role	Role Description
Sourcing Director	Project Administrator	This role is assigned to the agency's procurement official only. Contact Tom Hastings (thastings@mt.gov) for further information.
	Sourcing Specialist	A Sourcing Specialist can create, view, and edit all events created within the project.
	Stakeholder	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.
	Library Template Manager	A Library Template Manager is an event manager with the ability to create and manage the library and templates for the project.
Total Contract Manager	Contract Administrator	This role is assigned to the agency's procurement official only. Contact Tom Hastings (thastings@mt.gov) for further information.
	Contract Manager	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.
	Stakeholder	Stakeholders have view-only access to contracts and receive contract notifications. Users can be set up for view-only access to all agency contracts or to specific ones.
Shopping	Shopper	Shoppers are typically allowed to shop, but cannot place an order, and instead assign a cart to a Buyer.
	Buyer	Buyers can shop and submit their own cart which requires a State ProCard as well as reject or approve carts assigned to them.

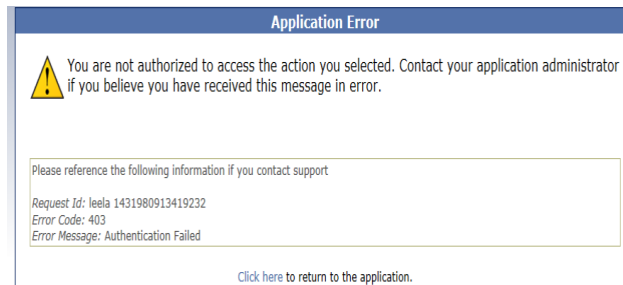
5. ACCESSING EMACS – PRODUCTION ENVIRONMENT

5.1 State Users Within State of Montana Network

- a. Access ePass Montana's Production environment: <https://app.mt.gov/epass/Authn/selectIDP.html>
2. Click the **Login** button under **Login with State Employee Account**.



3. Enter your **"C" number** and **password** associated with that number (same info used to access your desktop computer).
4. Scroll down to **Add a Service?**; click on **eMACS (ePass)**. **NOTE:** after the initial login, **eMACS (ePass)** 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 Scquest.com** stating approval or denial of your registration.

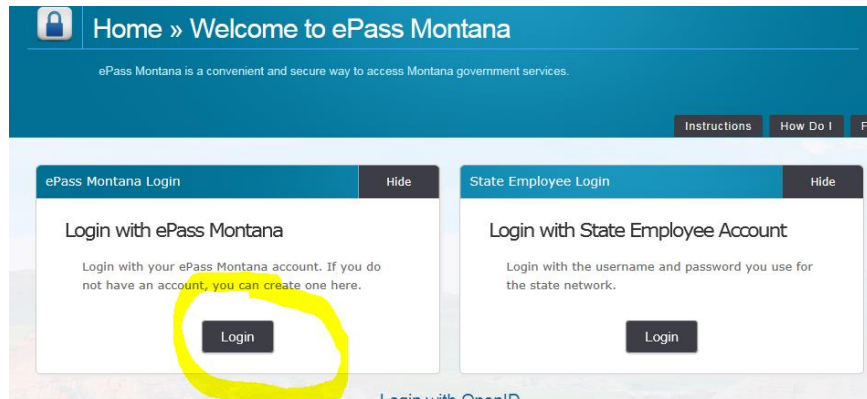


If your registration is denied and you have questions contact the eMACS Support Unit.

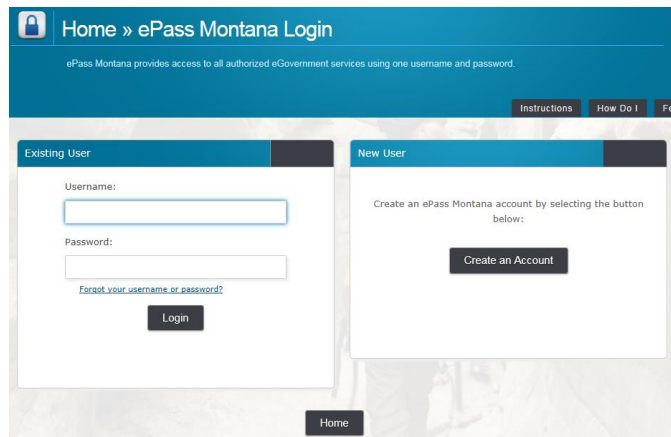
6. If your registration is approved, log in to eMACS and complete your User Profile **prior** to doing any shopping or work. Follow the steps listed in **Section 8.1, Completing a New User Profile**.

5.2 State Users Outside State of Montana Network

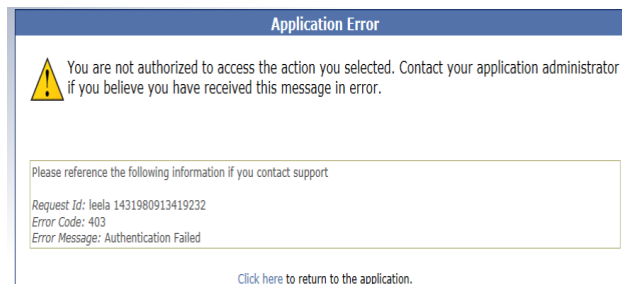
1. Access ePass Montana's Production environment: <https://app.mt.gov/epass/Authn/selectIDP.html>
2. Click the **Login** button under **Login with ePass Montana**.



You will be directed to the following screen.



3. Click on **Create an Account** under the **New User** section. Complete all required fields to create your ePass account.
4. Return to the ePass home page and login: <https://app.mt.gov/epass/Authn/selectIDP.html>.
5. Scroll down to **Add a Service?**; click on **eMACS (ePass)**. **NOTE:** after the initial login, **eMACS (ePass)** will be found under **Your Services**.
6. 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.



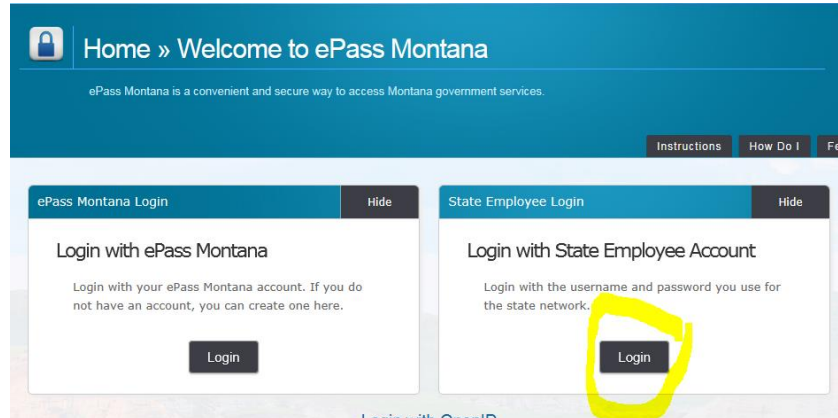
If your registration is denied and you have questions contact the eMACS Support Unit.

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 8.1, Completing a New User Profile**.

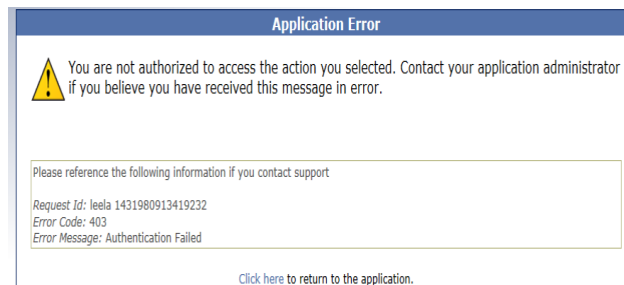
6. ACCESSING EMACS – TEST ENVIRONMENT

6.1 State Users Within State of Montana Network

1. Access ePass Montana's Test environment: <https://tst.mt.gov/epass/Authn/selectIDP.html>
2. Click the **Login** button under **Login with State Employee Account**.



3. Enter your **"C" number** and **password** associated with that number (same info used to access your desktop computer).
4. Scroll down to **Add a Service?**; click on **eMACS TEST (ePass)**. **NOTE:** after the initial login, **eMACS TEST (ePass)** 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.

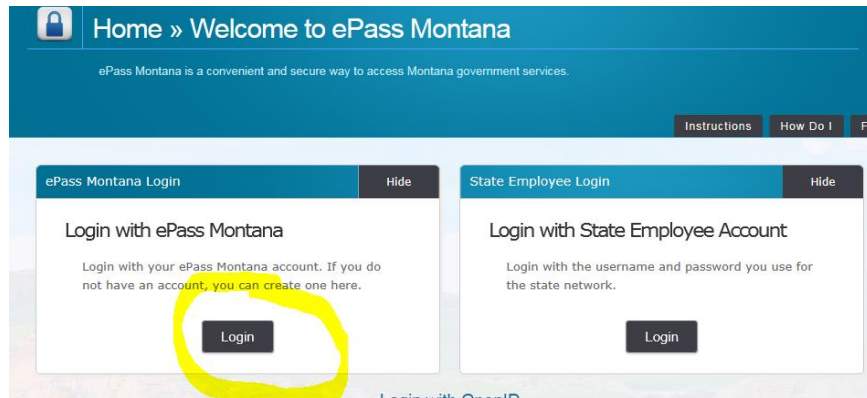


If your registration is denied and you have questions contact the eMACS Support Unit.

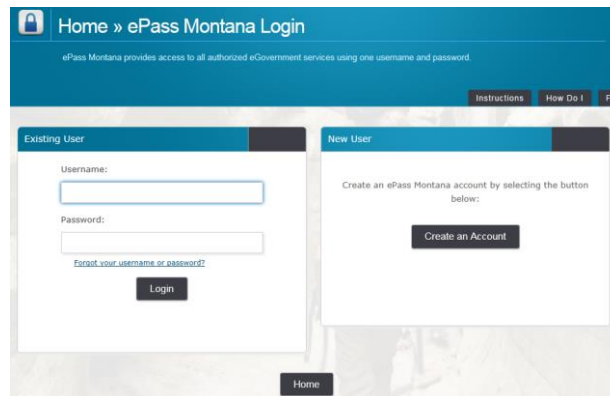
6. If your registration is approved, log in to eMACS and complete your User Profile **prior** to doing any shopping or work. Follow the steps listed in **Section 8.1, Completing a New User Profile**.

6.2 State Users Outside State of Montana Network

1. Access ePass Montana's Test environment: <https://tst.mt.gov/epass/Authn/selectIDP.html>
2. Click the **Login** button under **Login with ePass Montana**.



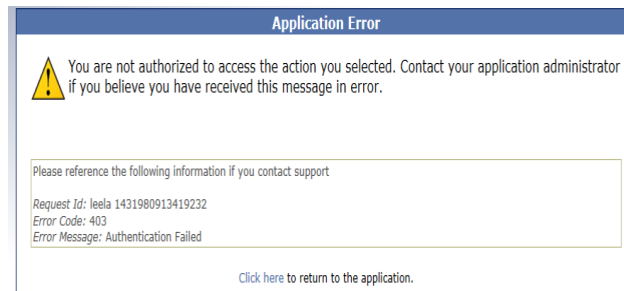
You will be directed to the following screen:



3. Click on **Create an Account** under the **New User** section. Complete all required fields to create your ePass account.

4. Return to the Test ePass home page and login: <https://tst.mt.gov/epass/Authn/selectIDP.html>.
5. Scroll down to **Add a Service?**; click on **eMACS TEST (ePass)**. **NOTE:** after the initial login, **eMACS TEST (ePass)** will be found under **Your Services**.

6. 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.



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 8.1, Completing a New User Profile**.

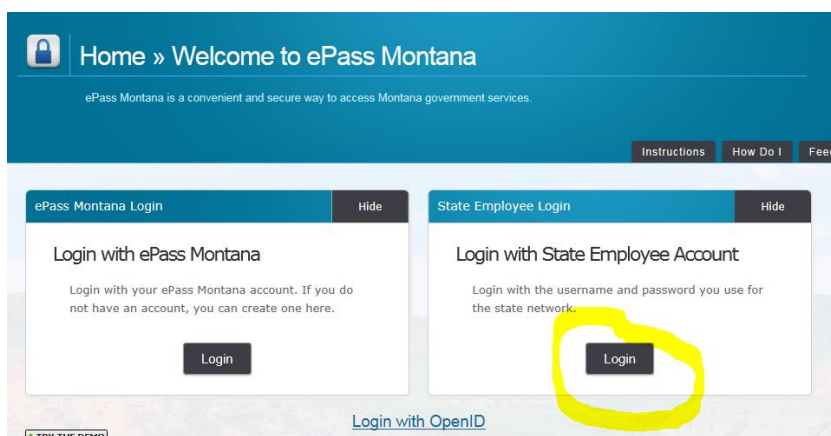
7. ACCESSING EMACS – IMPORTED USERS

Agency user information can be added to the system via a bulk import file. This import can be used when there are many users needing access all at once or during a module implementation. The difference between imported access and others are imported users will not receive the error message when trying to access eMACS and will be taken directly into eMACS when clicking on the eMACS(ePass) link in ePass.

This type of access is recommended for users within the State's network and who log in to ePass using **Login with State Employee Account**. Users who would log in under **Login with ePass Montana** must contact the eMACS Support Unit.

Accessing eMACS – Production Environment

1. Access ePass Montana's Production Environment: <https://app.mt.gov/epass/portal/>.
2. Click the **Login** button under **Login with State Employee Account**.



3. Enter your **"C" number** and **password** associated with that number (same info used to access your desktop computer).
4. Scroll down to the section **Add a Service?**, click on **eMACS (ePass)**. **Note:** after the initial login, **eMACS (ePass)** will be found under **Your Services**.
5. Complete your User Profile prior to doing any shopping or work. Follow the steps listed in **Section 8, User Profiles**.

8. USER PROFILES

The User Profile captures eMACS user information such as name, phone number, e-mail address, Ship To/Bill To addresses, ProCard, 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.

8.1 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 (emacs@mt.gov).
 - 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

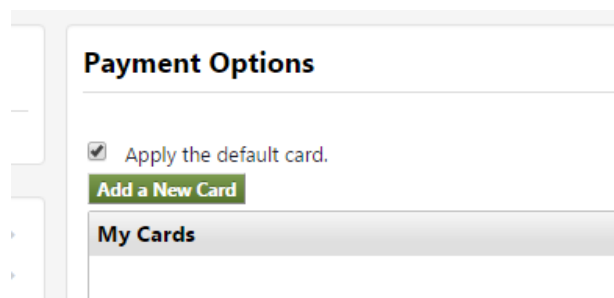
- a. Click on the **Ship To** tab, then on **Select Addresses for Profile**. Search for and select the applicable Ship To address by clicking on the down arrow next to **Select Address Template**. If the correct address is not available, user's Agency Procurement Officer or Single Point of Contact must contact the eMACS Support Unit with a request to add the address (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**.

Bill To Address

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

Billing Information (ProCard Information, if applicable)

- a. 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.



The screenshot shows a web interface for the 'Payment Options' section. At the top, the title 'Payment Options' is displayed. Below the title, there is a checkbox labeled 'Apply the default card.' which is checked. Underneath the checkbox is a green button labeled 'Add a New Card'. At the bottom of the section, there is a grey button labeled 'My Cards'.

8.2 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 (ProCard 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 user name 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: (ProCard 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.

The screenshot shows the 'Payment Options' form in eMACS. At the top left, there is a checkbox labeled 'Apply the default card' which is checked and circled in yellow. Below it is a button labeled 'Add a New Card'. To the right of this is a section titled 'Card Details'. It contains several input fields: 'Name this card (e.g. My Visa)', 'Cardholder Name', and 'Card Number'. Below these is the 'Expiration Date' field, which consists of two dropdown menus for month and year, with '1' and '2017' selected. At the bottom of the 'Card Details' section, there is a checkbox labeled 'Default card' which is checked and circled in yellow, and a 'Save' button below it.

9. 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.

9.1 Search for Events – Sourcing Director

1. Access eMACS.
2. Click on **Sourcing > Solicitations > Search Events**.
3. Search for an event.
 - Use the **Simple Search** to find events by an Event Number or Event Title. You may also use Quick Search by selecting the search icon in the upper right navigation and select to search for Solicitation.



- 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**.

Progress	Response % Complete	Vendor Name	Required Items Total Bid	Optional Items Total Bid	
Pending Award	100%	State of Montana eMACS	41.00 USD	100.00 USD (1 of 1)	<input type="checkbox"/> View Response
Submitted	100%	Garden City Janitorial	10,000.00 USD	10,000.00 USD (1 of 1)	<input type="checkbox"/> View Response
Intend To Bid	86%	TestingInviteVendor	-	-	<input type="checkbox"/>
Intention Not Declared	0%	Bonny B	-	-	<input type="checkbox"/>
Event Not Viewed	-	Justinls Company	-	-	<input type="checkbox"/>

9.2 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.
4. Results and access will vary depending on how the contract was set up.