ACCESSING EMACS

New User Guide to Accessing eMACS – State Agencies

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# TABLE OF CONTENTS

1. INTRODUCTION .......................................................................................................................... 3

2. RESOURCES .............................................................................................................................. 3

3. REQUESTING USER ACCESS TO EMACS .............................................................................. 4
   3.1 New Users ............................................................................................................................... 4
   3.2 Inactivating Users .................................................................................................................. 4

4. ROLES ........................................................................................................................................ 5
   4.1 Role Descriptions .................................................................................................................... 5

5. ACCESSING EMACS – PRODUCTION ENVIRONMENT ............................................................ 6
   5.1 State Users Within State of Montana Network ...................................................................... 6
   5.2 State Users Outside State of Montana Network .................................................................... 7

6. ACCESSING EMACS – TEST ENVIRONMENT ......................................................................... 8
   6.1 State Users Within State of Montana Network ...................................................................... 8
   6.2 State Users Outside State of Montana Network .................................................................... 9

7. ACCESSING EMACS – IMPORTED USERS ........................................................................... 11

8. USER PROFILES ....................................................................................................................... 12
   8.1 Completing a New User Profile ............................................................................................ 12
   8.2 Updating a User Profile ......................................................................................................... 13

9. STAKEHOLDERS ....................................................................................................................... 14
   9.1 Search for Events – Sourcing Director ............................................................................... 14
   9.2 Search for Contracts – Total Contract Manager ................................................................. 14
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.

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<th>ROLE DESCRIPTIONS</th>
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<tbody>
<tr>
<td>Module</td>
</tr>
<tr>
<td>--------</td>
</tr>
<tr>
<td><strong>Sourcing Director</strong></td>
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<td></td>
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<tr>
<td></td>
</tr>
<tr>
<td></td>
</tr>
<tr>
<td><strong>Total Contract Manager</strong></td>
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<tr>
<td></td>
</tr>
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<tr>
<td><strong>Shopping</strong></td>
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5. ACCESSING EMACS – PRODUCTION ENVIRONMENT

5.1 State Users Within State of Montana Network


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 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.
5.2 State Users Outside State of Montana Network


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.


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.

   ![Application Error](image)

   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

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

![Image of login page](image)

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.

![Image of error message](image)

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


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.


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 is that 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

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.
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.

c. 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.
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:
     o Sourcing Event Identification - Search by event number or event title.
     o 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.

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.