

NOTE: This document describes the process of creating a Limited Solicitation in eMACS' Sourcing Director module. Questions on this process or limited solicitations, contact the State Procurement Bureau, 444-2575. Questions on the functionality of Sourcing Director, contact eMACS Support Unit, emacs@mt.gov.

Creating a Limited Solicitation Event in eMACS

Note: Templates can assist with streamlining the event creation process. Instead of creating the same event for the same product or service from scratch each time, create a template that contains predefined information. Just select the applicable template and update text, information specific to the event. Contact eMACS Support Unit for assistance and information on templates.

Procedures:

1. Navigate to **Sourcing > Solicitations > Create New Event...:** Create Solicitation wizard appears.

- a. Event Title: enter an Event Title.
- b. Project: agency name auto-populates the Project field. Click Next.
- c. Event Type: click on the Search icon, select Limited Solicitation.
 - If no Limited Solicitation template is available, click Create Solicitation.
 - If a template is available, click on the Search icon next to Create from Template and select the template. Click Create Solicitation.

NOTE: If you are using a template to create a limited solicitation, the following steps may not be applicable depending on how the template has been created.

2. Setup:

- a. Event Title, Event Type, and Project auto-populate from information input in the Create Solicitation wizard. Event Title can be edited at this time if needed.
- b. Event Number auto-populates based on agency's numbering wheel. Event Number can be edited by clicking on the pencil icon.
- c. Skip Stage Title.
- d. **Commodity Codes:**
 - **Reporting Commodity Code:** only one Reporting Commodity Code can be selected. Code should match or closely match service/product being procured. System will send notices of event to all vendors registered within the selected Reporting Commodity Code.
 - **Additional Commodity Codes:** can be selected if desired. Additional Commodity Codes add more vendors to the event. System will send notices of event to all vendors registered within selected Commodity Codes.
 - **Forced Vendor Invitation by Commodity Code:**
 - Choose Yes to have the system send out event invitations to vendors.
 - Choose No to not send out event invitations and add your own vendors.
- e. **Payment:**
 - **Estimated Value (Required):** enter the procurement's estimated Total Contract Value. Leaving this field blank results in event failing the Approval workflow and being sent back to Event Creator for input. This information is not available to the vendors.
 - Select the available Payment Term or leave field blank.

f. **Bid and Evaluation:** With the exception of Alternate Items and Allow Split Item Quantity in Evaluations, remaining questions are not normally used in a Limited Solicitation. Contact eMACS Support Unit for information on this section.

g. **Display and Communication:**

- **Visible to Public:** select Yes to post event to the public bid site or No to not post event to public bid site. Only vendors added to event can access it. Public Bid website: <https://bids.scquest.com/apps/Router/PublicEvent?CustomerOrg=StateOfMontana>.
- **(optional) Public Event Short Description:** enter a short description of the event. One or two sentences should be sufficient as description field is limited to 200 characters.

h. **Dates:**

NOTE: Dates cannot be changed after being saved. It is suggested to wait to enter these dates as the very last step in building the event.

- Time zone defaults to Mountain Time.
- **Release Date:** optional for an event, and is the date event invitations are sent to vendors. Vendors can view the event in their portal, but cannot submit responses until event is Open.
- **Open Date:** date/time vendors can begin responding to event.
- **Close Date:** date/time sealed responses are due.
- **Sealed Bid Open Date:** leave checked if date/time sealed bids are opened is the same as Close Date. If not, uncheck and select different date. Leave checked to Show Sealed Bid Open Date to Vendor.
- **Q&A Submission Close Date:** select date/time to prevent vendors from submitting questions in the Q&A section of the event. You may select Same as Close Date to allow questions up to the event Close Date.

NOTE: This date should be set at least a week before the event Close Date so vendors have an opportunity to incorporate any changes to the event into their responses.

i. Click on Save Progress or Next. Clicking on Next saves information and moves to the next section.

3. **Users:** Event Creator, Event Owner, and Contacts are auto-populated by the system. If additional users are needed, click on Edit Users. Users must be registered in the eMACS system to be selected.

4. **Description:** This should be a comprehensive description of the supplies and/or services requested.

5. **Stage Description:** Skip

6. **Prerequisites:** enter any prerequisites to the event. Prerequisites can be added for important information vendors must review regarding the event prior to proceeding with their response (e.g., delivery information, single point of contact, agency terms and conditions, a draft contract). Prerequisites can come preloaded in a template, newly created, or retrieved from an agency's Library.

To create a new Prerequisite, click on Add Prerequisite > Add New Prerequisite:

- a. Enter Instructions to Vendor text.
- b. Enter Prerequisite Content. This can be either text entered directly about the Prerequisite or a file attached.
- c. Type. Select Optional if vendors are not required to view the Prerequisite or Required to Enter Bid if vendors are required to certify they have reviewed the Prerequisite prior to submitting a response.

NOTE: There is a choice to require vendors read and accept a prerequisite before they can view the event, Required to View Event. This option is NOT recommended as it requires acceptance before the vendor knows anything about the event, which may discourage bidding. Also, these prerequisites do not show up in the pdf version of the event when posted to the public bid site.

- d. Certification Text: enter Certification text.
- e. If Prerequisite requires vendors upload a document, check Vendor Must Also Upload a File.
- f. Display Order: set Display Order as needed. Click Save Changes.

7. Buyer Attachments: add any Buyer Attachments. These are usually documents containing information vendors may need to know about the supplies and/or services requested (e.g., floor plans, detailed specifications, pictures, spreadsheets). Attachments may be an uploaded file or a link. Attachments can come preloaded in a template, newly created or retrieved from an agency's Library.

NOTE: Vendors are not required to respond to Buyer Attachments. If a response is required include information in the Prerequisite or Question section.

8. Vendor Attachments: Skip. This section allows vendors to upload accompanying documents to their response. **NOTE:** Vendors are not required to respond to Vendor Attachments.

9. Questions: enter any questions to which vendors should provide responses. Questions can come preloaded in a template, newly created or retrieved from an agency's Library. Questions can be further divided by groups.

To add a new question, click on Add Question > Add New Question:

- a. Enter Question Text.
- b. Select applicable Response Type.
- c. If vendor must respond to the question, check the box Vendor Response is Required.
- d. If a document accompanies the question, Attach File.
- e. Display Order: set Display Order as needed. Click Save Changes.

10. Items: enter line item information under Product Line Items and/or Service Line Items tab(s). Items can come preloaded in a template, newly created or retrieved from an agency's Library. Line items can be further divided by groups.

To create a new line item, click on Add Product or Service Line Item > Add New Item:

- a. Enter Name of line item.
- b. Add a Description.
- c. Enter a Quantity and Unit of Measure.
- d. Requested Delivery: select either Date or Days after award.
- e. Options: select the appropriate option.
- f. If a file accompanies line item, Attach File. Click Save Changes.

11. Vendors: eMACS auto-populates the vendor list based on the Commodity Codes that were chosen in Setup.

- a. Additional vendors can also be added to the event. After verifying vendor is not included in the vendor list:
 - Click on Add Vendors to Event.
 - Click on Manually Invite Vendors > Add Vendor to Event.
 - Enter Vendor Name and Email. Click either Save or Save and Add Another.

- 12. Review and Submit:** prior to submitting, go back to Setup and enter Open, Close, and Question dates. eMACS will indicate all sections that have not yet been completed and will not allow the event to be submitted for approval until everything is complete. Submit for Approval will move the event into workflow where it will be sent to agency approvers, as appropriate. Upon approval, and depending on information provided in Setup, event will post to public bid site.
- 13. Internal Notes:** external documents related to the event should be saved here. This provides a complete record of the event. Examples of related documents are requisition, signed ITPR, email messages, etc. Information/documents are not available for public view.