Montana Acquisition & Contracting System (eMACS)

eMACS Handbook

Agency Sourcing Director Administration and Management

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Welcome

The purpose of this **eMACS Handbook for Agency Sourcing Director Administration and Management** is to provide agencies with instructions on how to perform the key activities associated with administering and managing users, solicitations, and vendors in the eMACS Sourcing Director Module.

Objectives

The purpose of this handbook is to give guidance to agency project administrators in the utilization of eMACS Sourcing Director. It can be used for the following tasks:

- **Setting up agency users and assigning roles**. This includes adding users, assisting with the logon process, and assigning users roles for the project and for events.
- **Creating events**. Information is provided on how to set up individual events – structure of events, roles, and the posting of events.
- **Monitoring responses and conducting evaluations**. Project administrators can view instructions on how to monitor vendor responses to event, as well as evaluate bids to determine award.

Support Contact Information

If you need additional help or assistance, please contact eMACS@mt.gov.

Definitions

Close Date – Date/time when bidding period ends and vendors can no longer submit responses
Contacts –Users who a vendor may contact for additional information; the vendor will see the contact information when viewing the event
Event – Individual solicitations that vendors can respond to
Event Creator – User who can create new events for a project and assign users to the event; cannot edit or view events created by other Event Creators of the project (unless the user is also an Event Manager). The user must have either Create/Own Events permissions or Manage Project Events permission to be assigned as an Event Creator.
Event Manager – User who can create, view, and edit all events created within the project; must have the Manage Project Events permissions to be assigned as an Event Manager
Event Owner – User who has full control over the event; can be inherited as an Event Manager on a project, or can be explicitly set for the event
Event Type – Type of sourcing method (RFI, RFP, IFB)
Open Date – Date/time when the vendors can begin responding to the sourcing event
Project – Another name for agency; used in the hierarchical structure to segregate event content
Project Administrator – Designated person in agency who acts as administrator of agency's activity in eMACS Sourcing Director Module; set by State Procurement Bureau (for information or changes, contact SPB)
Proxy Bid – When an agency user enters a bid response on behalf of a vendor using responses provided by the vendor via mail, email, or phone (See Entering Proxy Bids)
Stakeholder – User who has view access to all events in the project. The user must have one of the following sourcing permissions related to events to be assigned as a stakeholder: View Events, Create/Own Events, Manage Project Events, Approve/Reject Sourcing Event, or Finalize Award Scenario.

Getting Started

Assigning Project Administrators

Project administrators for each agency are established in the system by the State Procurement Bureau (SPB). Your agency should already have a project administrator assigned at this time. If you have questions about whom your agency project administrator is or changes need to be made to this position, please contact eMACS@mt.gov.

Obtaining Basic Roles for Users

Users need to be added at the top level and given basic rights. This is done by the SPB. Project Administrators need to do the following:

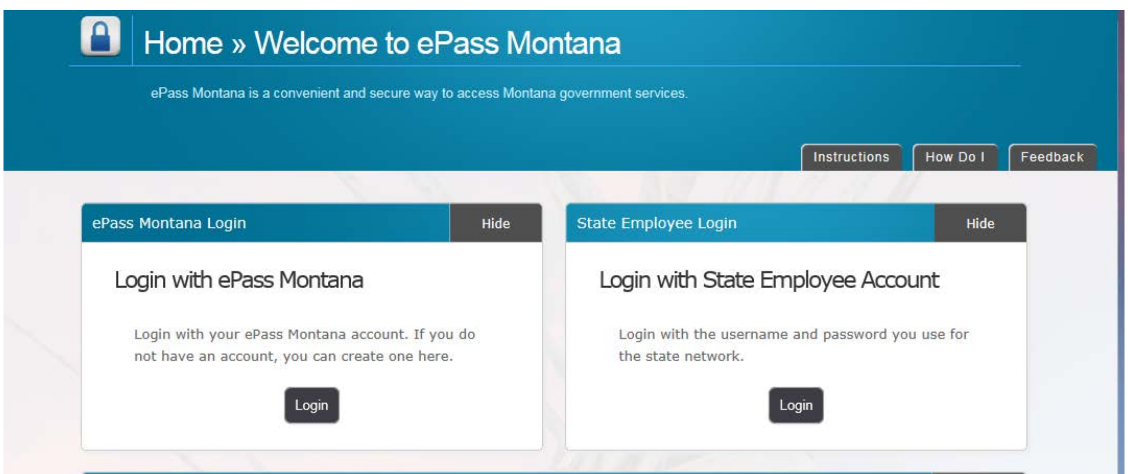
1. List the names of agency users and determine which role each user needs to be assigned to. The options for roles and a description of the related permissions for users in eMACS are listed below:
   - **Project Administrator** – This should be the head purchasing person within each project (agency). This role has full control of the project and can add users to the project and events within their project. There can be more than one project administrator per agency if required by that agency.
   - **TSM(Vendor Management) Specialist and Sourcing Specialist** - These are the basics roles needed to view, create and make changes to vendor profiles and events.
   - **TSM(Vendor Management) Base and Sourcing Stakeholder** – These roles are “view only” for the user that is assigned this role.

2. Contact the SPB at eMACS@mt.gov with the list of users and roles.
3. SPB will then set up user and roles based on this list (see Login Confirmation instructions).

Users

ePass Login

Users have to use ePass to gain access to the eMACS system. The link to ePass is https://app.mt.gov/epass/Authn/selectIDP.html.

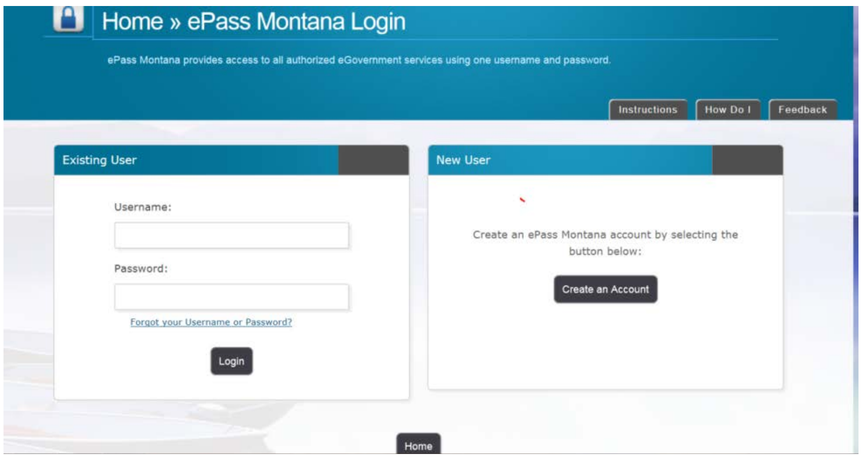


If you have a State Employee Account:

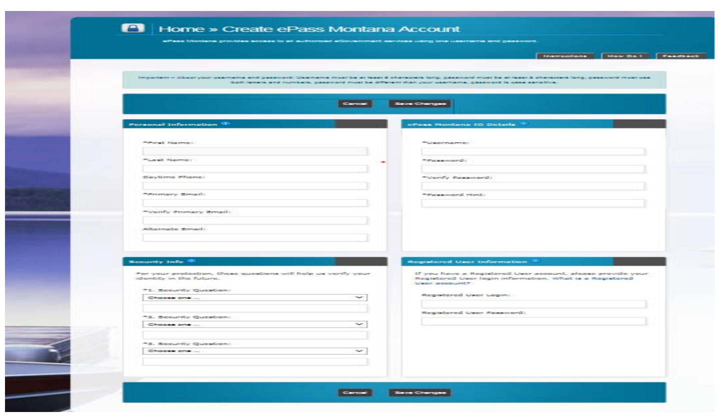
1. Navigate to the ePass home page.
2. Click on the **Login** button under **Login with State Employee Account**.
3. Enter your assigned "C" number and the password associated with that number (same used to access your desktop computer).

If you are a user OUTSIDE of the State of Montana Network:

1. Navigate to the ePass home page.
2. Click on the **Login** button under **Login with ePass Montana**. You will be directed to the following screen.



3. Click on the **Create Account** button under the **New User** section. The informational page below will be displayed.



4. Once all of the required fields are complete, the account is created.
5. Return to the ePass home page and login.

Login Confirmation

1. After logging in, scroll to **"Add a Service" section** to find the eMACS link and click on it.
2. As a first time user, you will receive the error listed below. This will only happen the first time a user tries to gain access. This error triggers the registration process for the SPB.

Application Error

You are not authorized to access the action you selected. Contact your application administrator if you believe you have received this message in error.

Please reference the following information if you contact support

Request Id: leela 1431980913419232
Error Code: 403
Error Message: Authentication Failed

Click here to return to the application.

3. SPB will review the registration request and assign the roles that were instructed by the Project Administrator (see Obtaining Basic Roles for Users).
4. Users will receive an email once the registration is approved and completed. See example email below.

StateOfMontana - cm0527: Your Registration has been Approved !!

support@sciquest.com
Sent: Thu 5/28/2015 3:39 PM
To: Nelson, Brittney

Re: NEW REGISTRATION APPROVED FOR USER ID: cm0527

Dear Brittney Nelson,

Your registration has been approved. You now have access to the SelectSite application for StateOfMontana.

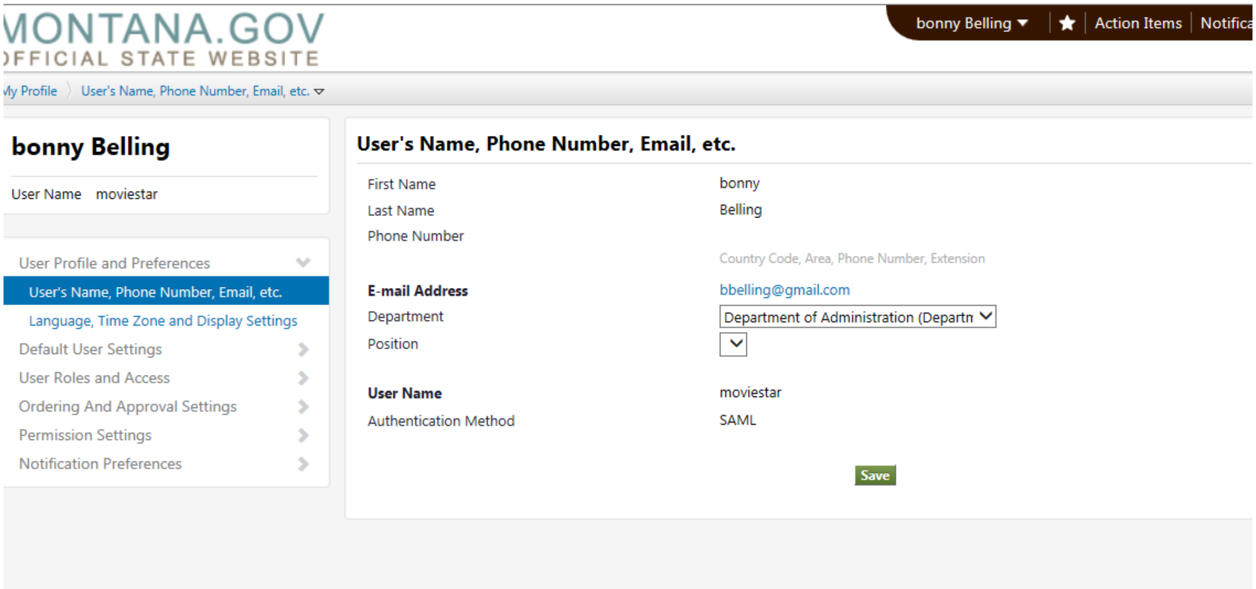
You can access the SelectSite application at https://usertest.sciquest.com/apps/Router/Start?AuthUser=2511127&Tmstmp=1432849125479106.

If you have any questions on accessing the SelectSite application or its use, please contact your SelectSite Support Team.

Support Team Contact Information:

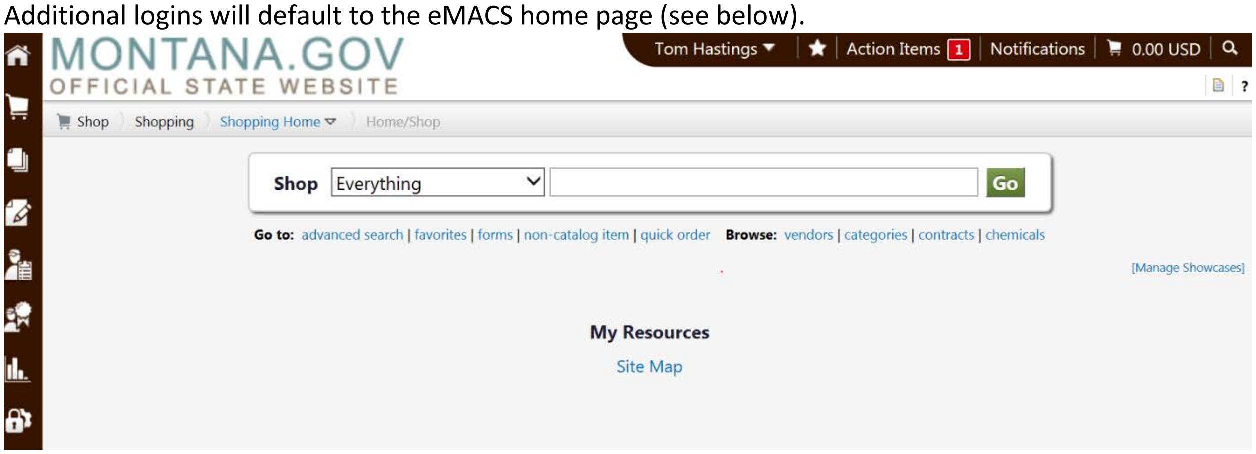
Thank you,
StateOfMontana

5. After the registration is approved, user login will default to profile page.



Additional Logins

Additional logins will default to the eMACS home page (see below).



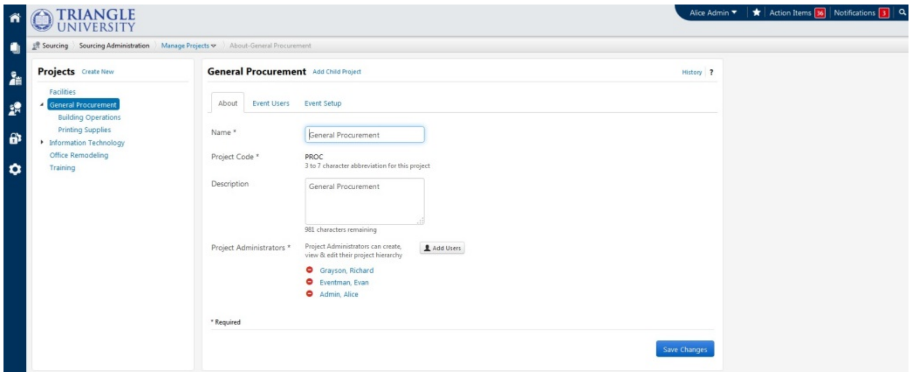
Projects (Adapted from SciQuest's Sourcing Director Handbook)

Overview

Projects are designed around a hierarchical structure: parent, child, grandchild, etc.. Each agency is represented by a project. There is no limit to the number of sub-levels you can add beneath a parent project. Examples of sub-projects include separation by the type of purchase (office supplies, chemicals, etc..) or by procurement group within an organization.

Every event created in the system must be associated with a project or sub-project at the time of creation, and users are given access to these same project access groups. If you create a new event, such as a Request for Information to purchase fax machines, you might associate that event with the Office Supplies project, thereby giving access to your event to all users in the Office Supplies project group. This would determine who can view and update your event. What functions users can perform for any given event are also dictated by their assigned permissions. The person creating or updating an event has the ability to open access to the event to other users.

Note that a user who has access to a particular project also has access to all sub-projects beneath that project by default, but a user assigned access only to a sub-project does NOT have access to parent projects above it.
The following images show an existing Project configuration, consisting of information about the project, Event Users, and Event Setup configurations that will be used by default when creating events for the selected project. Note: Some options, such as Respond by Proxy, Sealed Bid and Public Site, will only show if your organization and project are configured to allow them on events.

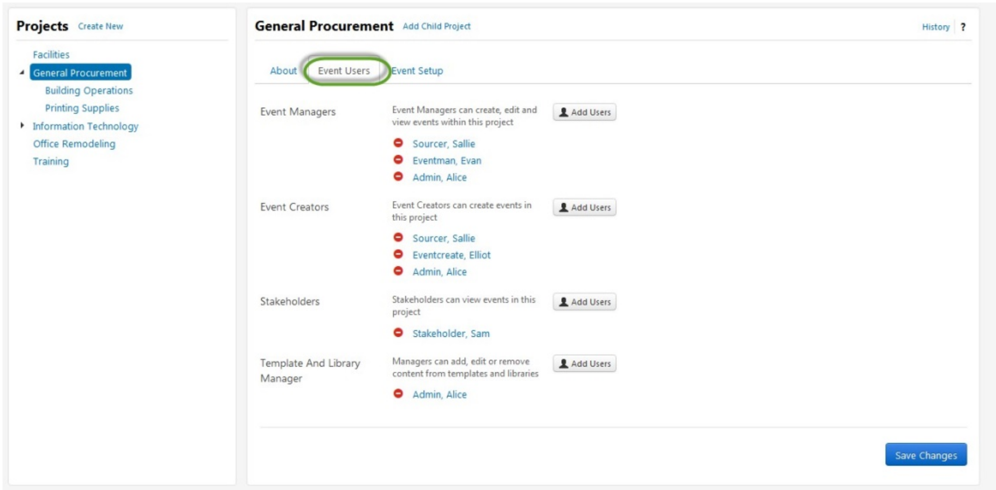


Basic Information

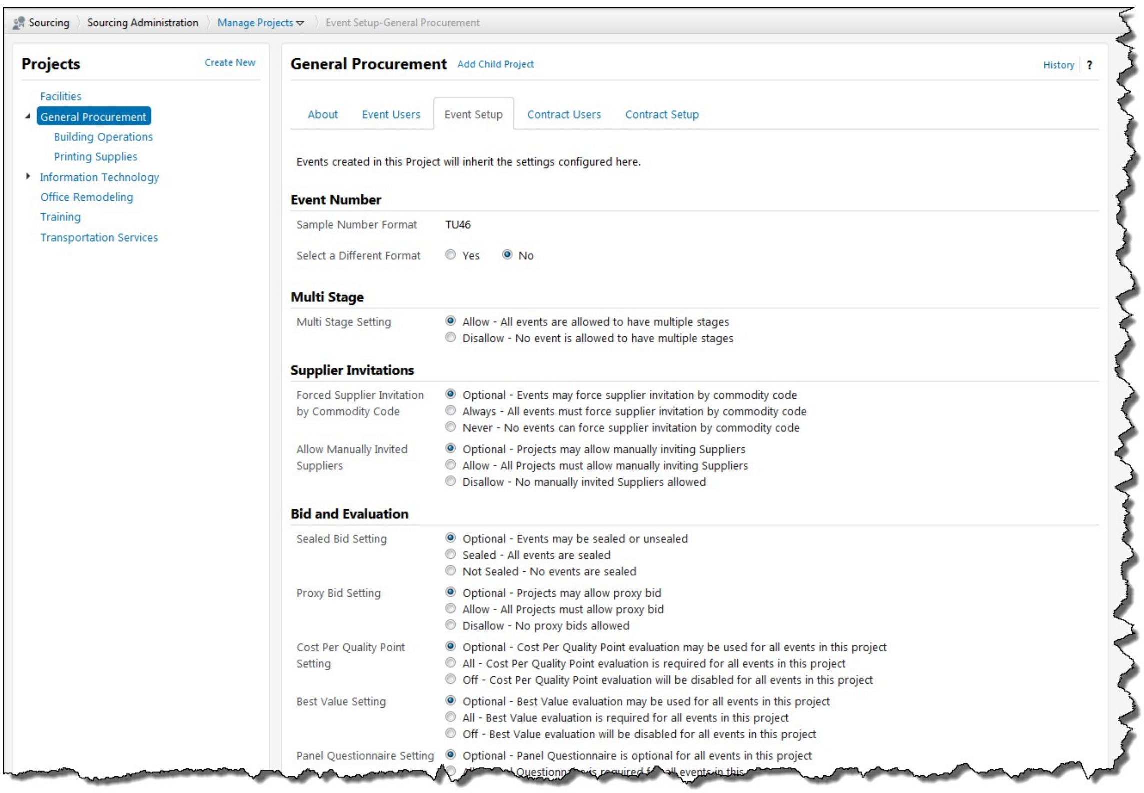
The **About** tab contains the basic information about the project, including:

- **Name**: The name of the agency. This may be edited at any time.
- **Project Code**: The project code is provided at the time of project creation, and cannot be edited. If the project code is no longer valid, you must delete the project and create a new one with the appropriate code.
- **Description**: You may enter an optional description for the agency.
- **Project Administrators**: You may select users to be project administrators for the selected agency. Administrators for a agency can create child projects and edit the project settings.

The **Event** Users tab is where you will enter the users who should be Event Managers, Event creators, Stakeholders, and Template and Library managers for the project. Users may be added to individual events; however, any users designated at the project level cannot be removed for events within the project.



The **Event Setup** tab is used to configure the default settings for the event. Many of the settings that dis play on this page are determined by your organization settings. Depending on the options selected for the project, additional configuration may be allowed at the event level.



- **Event Number:** Select the number format from your configured event number wheels. For existing projects, you will be shown a sample number format, and given the option to select a different format.
- **Multi Stage:** Select to allow or not allow events in the project to have multiple stages.
- **Vendor Invitations**

    - **Forced Vendor Invitation by Commodity Code:** If your organization utilizes commodity codes for sourcing events or items in a sourcing event, you may choose to force vendor invitations based on the event's commodity codes. For more information on this feature.
    - **Allow Manually Invited Vendor:** If your organization is configured to optionally allow Manually Invited Vendors, you may select if you want to allow users to have this option for all events in the project, always allow the option for all events in the project, or never allow the option for any events in the project. If the organization setting is to always or never allow, you will see the appropriate setting as read-only for the project. (see Manually Inviting Vendors).
- **Bid and Evaluation**
    - **Sealed Bid Setting:** If your organization is configured to optionally allow Sealed Bids, you may select if you want to allow users to have the option for events in the project to allow sealed bids or not, require that all events in the project use sealed bids, or never allow events in the project to use sealed bids. If the organization setting is to always or never allow, you will see the appropriate setting as read-only for the project
    - **Proxy Bid Setting:** If your organization is configured to optionally allow Proxy Bids, you may select if you want to allow users to have the option for events in the project to allow proxy bids or not, require that all events in the project allow proxy bids, or never allow proxy bids for events in the project. If the organization setting is to always or never allow, you will see the appropriate setting as read-only for the project.
    - **Cost Per Quality Point Setting (CPQP):** If your organization is configured to optionally allow Cost Per Quality Point analysis, you may select if you want to allow users to have the option to allow this analysis for events in the project, to require that CPQP is used on all events on the project, or to disable CPQP for all events in the project. If the organization setting is to always allow or never allow, you will see the appropriate setting as read-only for the project.
- **Best Value Setting**
    - **Panel Questionnaire Setting:** You will select if you want to make panel questionnaires an option for all events in the project, always available for events in the project, or never allowed for events in the project. The Panel Questionnaire must still be configured at the event level in order to be utilized.
    - **Auto Score Setting:** You will select if you want to make auto scoring an option for all events in the project, always available for events in the project, or never allowed for events in the project. The Auto Scoring criteria must still be configured at the event level in order to be utilized.
    - **Cost Analysis Setting:** You will select if you want to make cost analysis an option for all events in the project, always available for events in the project, or never allowed for events in the project. The Cost Analysis criteria must still be configured at the event level in order to be utilized.
    - **Alternate Items Setting:** Select if you would like alternate items to be optional for all events in the project, always allowed for events in the project, or never allowed for events in the project. If optional or allowed for events in the project, the items must be individually configured to accept alternates.
    - **Split Item Quantity Setting:** Select if you will allow an item to be awarded to multiple vendors or split between. You may select that split item awards are optional for events in the project, always allowed for events in the project, or

never allowed for events in the project. For more information about split item quantity awards, see Split Award Options.

- **Display and Communication**
    - o **Public Site Setting:** If your organization is configured to optionally allow events to be available on the Public Site, you may select if you want to allow users to have the option to make a project event public or not, require that all events in the project be available on the public site, or never allow events in the project to be public. If the organization setting is to always or never allow, you will see the appropriate setting as read-only for the project
    - o **Award Notification Emails:** If your organization has enabled Award Notifications, you will see them selected for the project, and therefore will be available to send for all events in the project.

Users who are **assigned as Project Administrators** to a project **may change the project settings.**

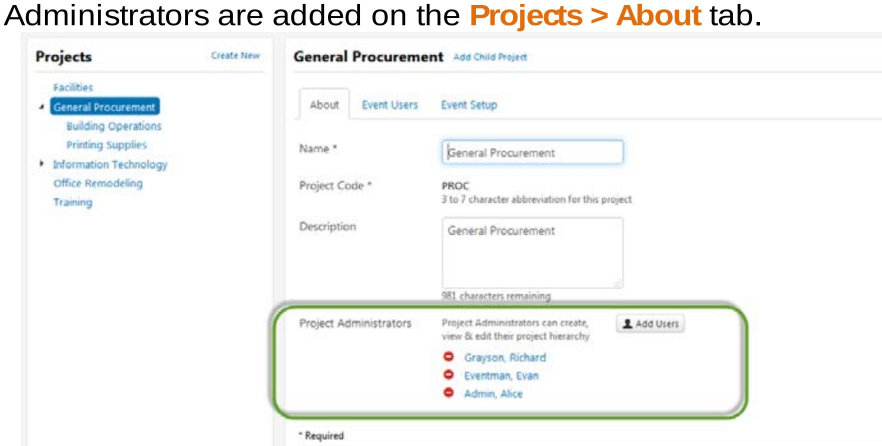
Adding/Managing Project Users

Users are assigned to different roles within a Project. Project Users include:

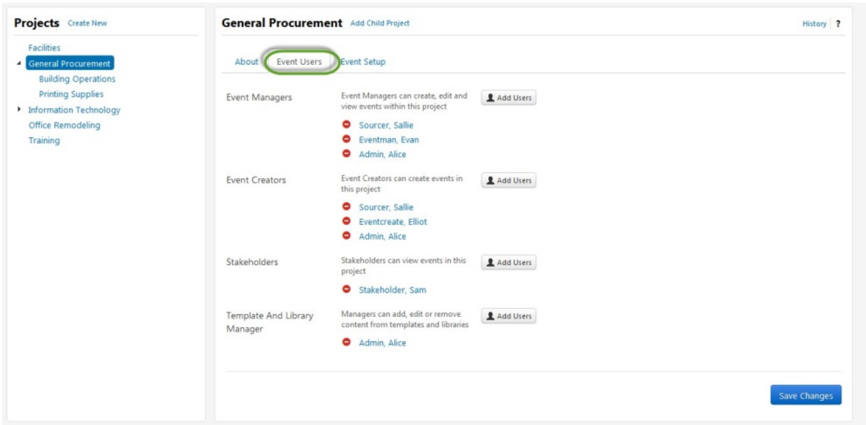
- **Project Administrators** can create, view and edit their project hierarchy.
- **Event Managers** can create, edit and view events within the project.
- **Event Creators** can create events within the project.
- **Stakeholders** can view events in the project.
- **Template and Library Managers** can add, edit or remove collateral in this project.

Project users can be modified by a Project Administrator. Events inherit the users assigned to the event Project, but the user list can be modified on the event by users with the appropriate permissions. Only those users with appropriate access to the project can view or edit events for the project.

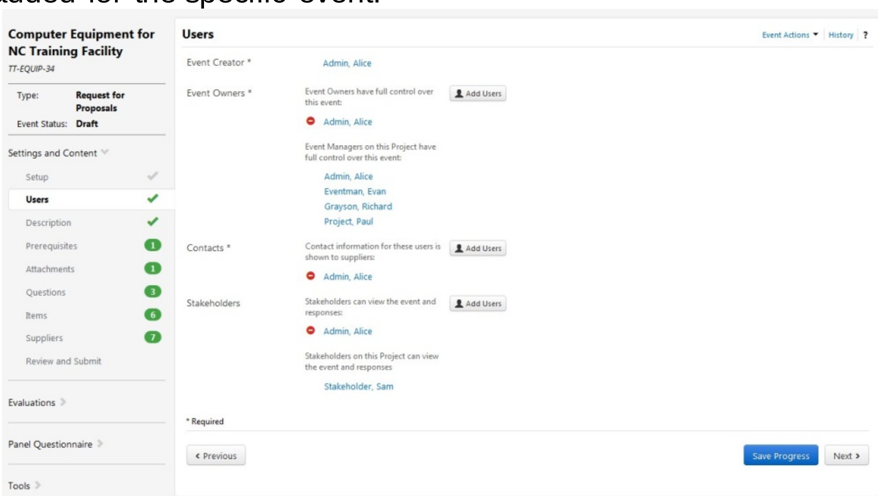
Project Administrators are added on the **Projects > About** tab.



Project Event Users (which inherit to the event) are managed on the **Projects > Event Users** tab.



Event users from the project level inherit to the Event Users page. Additional users may be added for the specific event.

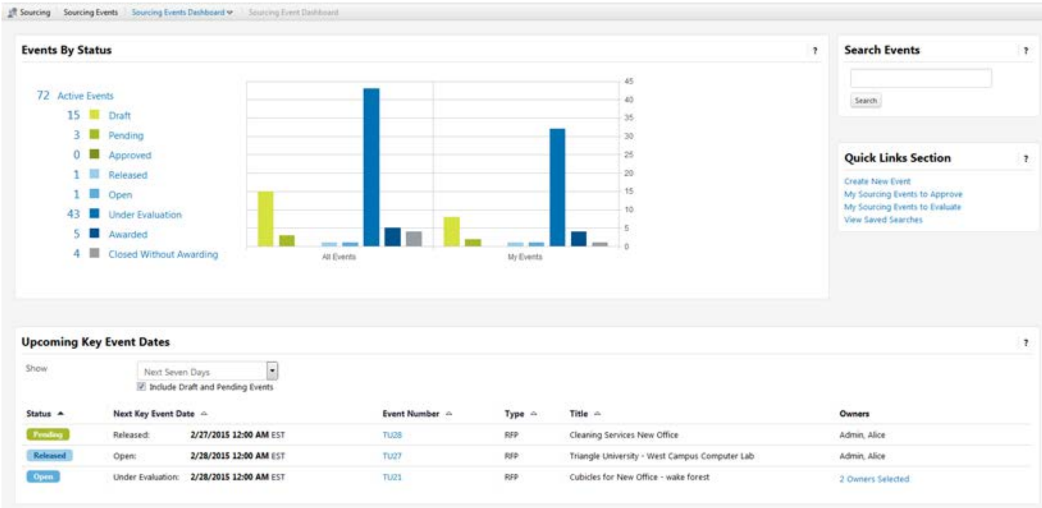


Events (Adapted from SciQuest's Sourcing Director Handbook)

Overview

Depending on your access, you create, view, update, copy, and delete existing events in this area. You can also add attachments to events and invite vendors to participate in events.

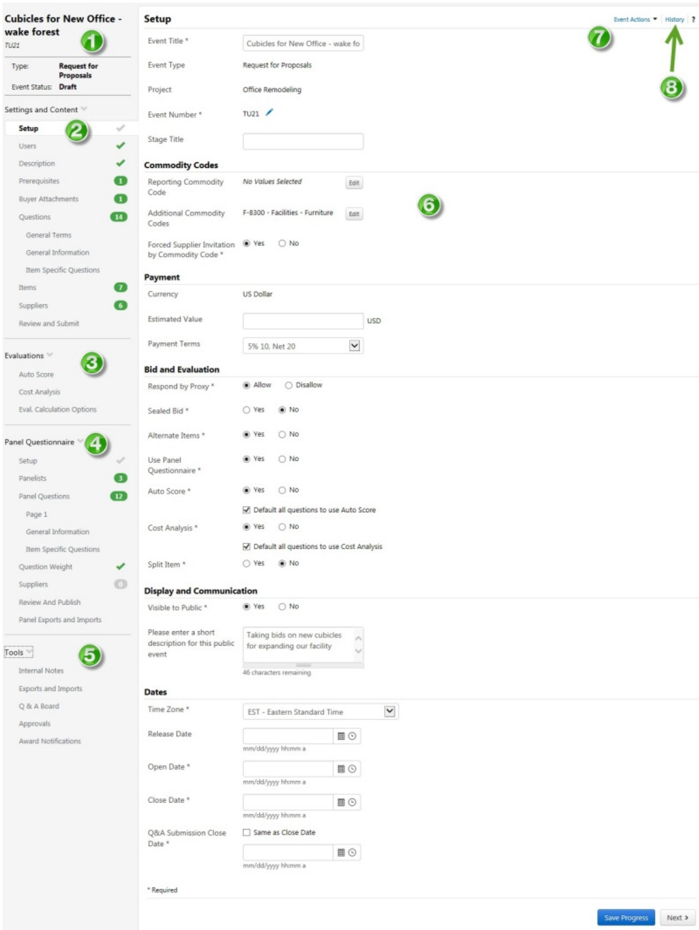
The Sourcing Events Dashboard allows users to have quick access to events to which they can edit or view. There are also quick links to upcoming or recent events, a link to create new events and searches, and other common tasks according to the user's permissions.



Basic Information

The pages and options that show for an event depend on the associated project and Event Type. Options will also depend on your organization's configuration for the components that are allowed as part of each event, such as being available on a Public Site, or allowing for auto scoring options.

The following image shows an event in Draft status on the Event Setup page. Note: Some options, such as Respond by Proxy, Sealed Bid and Public Site, will only show if your organization and project are configured to allow them on events.



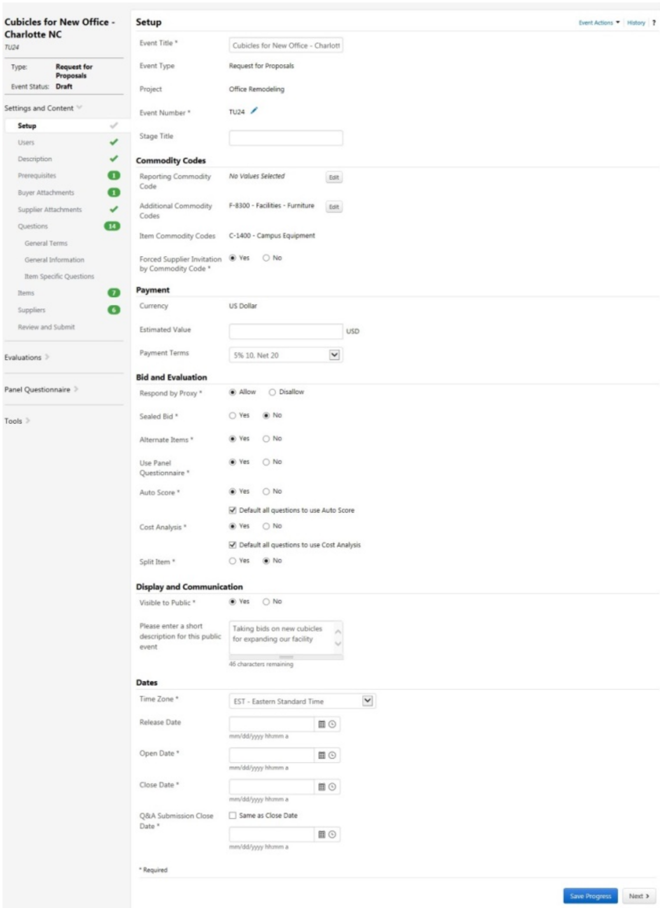
Set Up

From the Sourcing menu navigation, you can select **Sourcing Events > Create New Event** to open the Add Sourcing Event wizard that will guide you through the process of creating a new sourcing event. Through the event wizard you will give the event a title, select a template (if appropriate), select an event type, and select the project for the event.

You will then complete all the appropriate event details for that type of event. These options allow you to add or manage other elements of the event. You may configure the different elements directly for the event, or use elements that are available in Libraries to which you have access. The options displayed will depend on your permissions.

On the **Event Setup Page**:

- You will define the basics of the event such as Event Title, Event Number, Commodity Codes, Payment Terms, Dates, and more.
- Configure the Event Setup when you Create an Event, or you may edit the Event Setup page while the Event is in Draft status. Some fields, such as Estimated Value and Payment Terms, may be hidden by an administrator via Field Management. Required fields are indicated with an asterisk (*). Note that not all settings show or are configurable for the event, depending on the organization and project settings.



Event information - You may edit the Event title at any time. The event type and Project cannot be changed once the event is created, and are shown as read-only. Select to edit the event number, if appropriate. If your organization/project is configured to allow multi-stage events, you may enter a Stage title. You may also select to associate Commodity Codes with the Sourcing Event by selecting the Edit button and choosing from your organization's configured commodity codes.

Commodity Codes - You may associate commodity codes with the event for reporting, workflow and evaluation purposes. If you would have additions to the Commodity Codes list, please contact SPB eMACS@mt.gov.

- Select Edit to enter a Reporting Commodity Code and Additional Commodity Codes, as appropriate. If any items have commodity codes associated, you will see them displayed as Item Commodity Codes.
- Select if you would like Forced Vendor Invitation by Commodity Code enabled, which will automatically add vendors to the event if their vendor profile commodity code matches any of the commodity codes on the event.

Payment information - The selected currency will show as the currency for items. You may option ally list an estimated value for the event, and select from your organization's sourcing payment terms. If you do not utilize Estimated Value or Payment Terms, the fields may be hidden for all events via field management.

Bid and Evaluation settings - Depending on the organization and project settings, you may see some configurations as read-only. For settings that are Optional for the project, you may select whether or not to allow the feature for the event:

- **Respond by Proxy:** Indicates if proxy bids will be allowed for the event.
- **Sealed Bid:** Indicates if the event will use sealed bids.
- **Alternate Items:** Indicate if alternate items will be allowed. If Yes, additional configuration is available upon adding items.
- **Use Panel Questionnaire:** Indicates if a panel questionnaire should be configured for the event, as a tool for evaluating vendor responses. If enabled, a Panel Questionnaire section will show in the event navigation.
- **Auto Score:** Indicates if auto scoring should be used for the event, as a tool for evaluating vendor responses. If enabled, an Auto Score sub-section will show under the Evaluations section of the event navigation. You will also have the option to Default all questions to use Auto Score.
- **Cost Analysis:** Indicates if cost analysis should be used for the event, as a tool for evaluating vendor responses. If enabled, a Cost Analysis sub-section will show under the Evaluations section of the event navigation. You will also have the option to Default all questions to use Cost Analysis.
- **Allow Split Item Quantity in Evaluations:** Select if you would like the option to split the item quantity awarded among different vendors on the event. See Split Award Options for additional details.
- **Enforce Minimum Price:** Indicates if minimum prices will be set for items on the event. If enabled, a Minimum Price field will appear on the Add Item pop-up to set the minimum price for the item.
- **Enforce Maximum Price:** Indicates if maximum prices will be set for items on the event. If enabled, a Maximum Price field will appear on the Add Item pop-up to set the maximum price for the item.

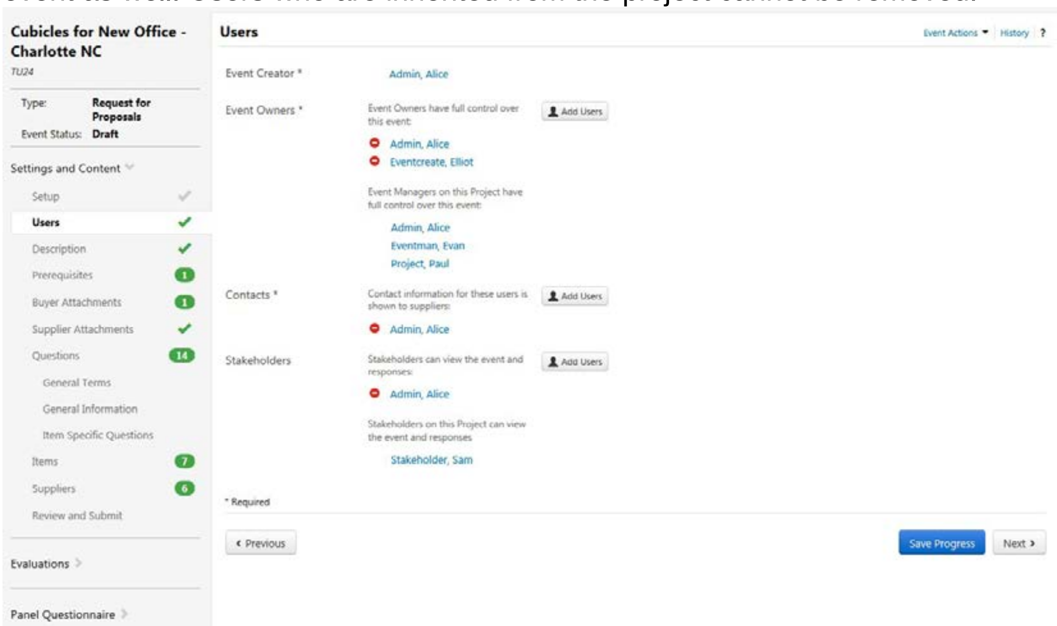
Display and communication settings -If the organization is configured to use a Public Site to dis play sourcing events, this setting will show. Depending on the project setting, you may see the configuration as read only, or you may have the option to select Yes or No. If enabled, the event will show on the organization's public site for sourcing events.

Dates - Select from the available time zones for your organization, then select the dates and times for the event.

- **Time Zone** - Select the appropriate time zone for the event.
- **Release Date** - the date/time that vendors can view some information about the event. They cannot yet view details or respond to the event.
- **Open Date** - the date/time the vendors can begin responding to the event.
- **Close Date** - the date/time the event closes for responses.
- **Sealed Bid Open Date** - if the event is configured to use Sealed Bids, select if the date/time that you may open sealed bids is the same as close date. If not, select a different date. You may also select if you want to show the sealed bid open date to the vendor.
- **Q&A Submission Close Date** - Select the date/time that you would like to prevent vendors from submitting questions in the Q&A section for the event. You may select the date to be the same as the event close date.

Assigning Users to Events

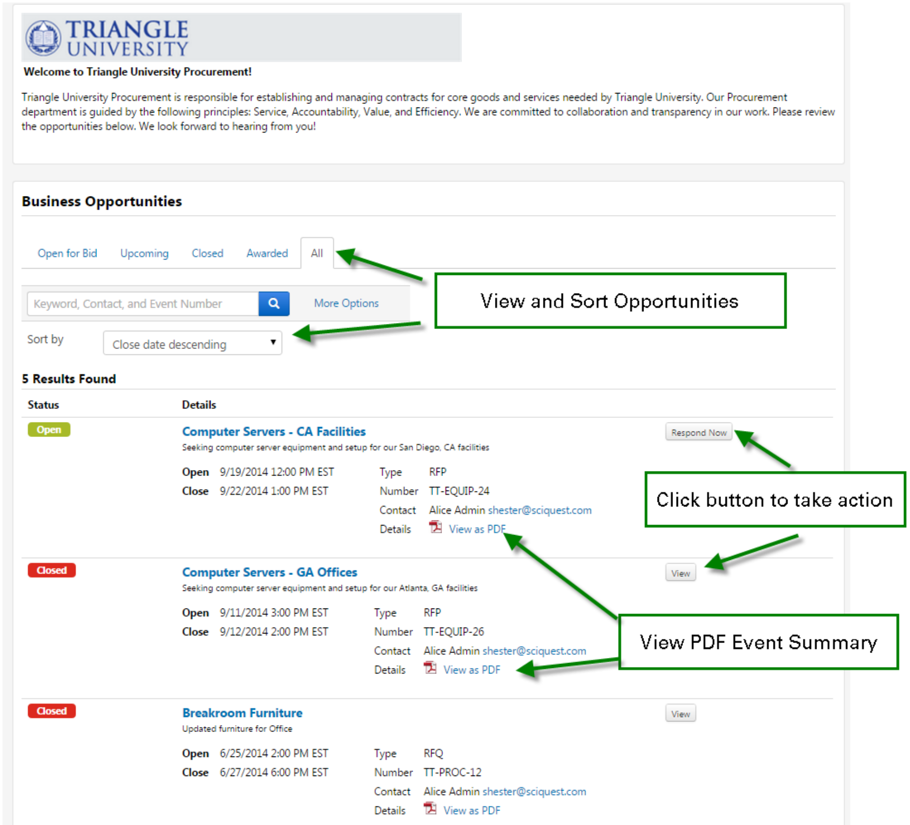
After the initial Event Setup, you will configure what users will have what type of access for the event. Some Event Users are inherited from the project, but users can be added to the specific event as well. Users who are inherited from the project cannot be removed.



To add users to the specific event, select the **Add Users button** for the appropriate access group, and choose from users with appropriate permissions for the role.

Posting/Viewing Events

A Public Site is a branded site where customers can publicly display sourcing bid opportunities without specifically inviting vendors through the application. Following is a configured Public Site home page.



The page displays events organized into 4 tabs. For the events in each tab, click on the button to navigate to the event in the portal or to complete a registration for the customer prior to viewing the event. You may also click to open or download a PDF file of the event information by selecting the **View as PDF** hyperlink.

- **Open for Bid** - this is the default page displayed, and shows events that are in an Open status.
- **Upcoming** - displays released events that are not yet open.
- **Closed** - displays events that have been closed or canceled. A More Options hyperlink is available to filter result by a specific status.
- **Awarded** - displays events that have been awarded, if you have configured your site to display awarded event information.
- **All** - displays all sourcing events available to the public site, in all statuses. A **More Options** hyperlink is available to filter results by a specific status. If an event has been Withdrawn, the PDF will not be generated on the Public Site.

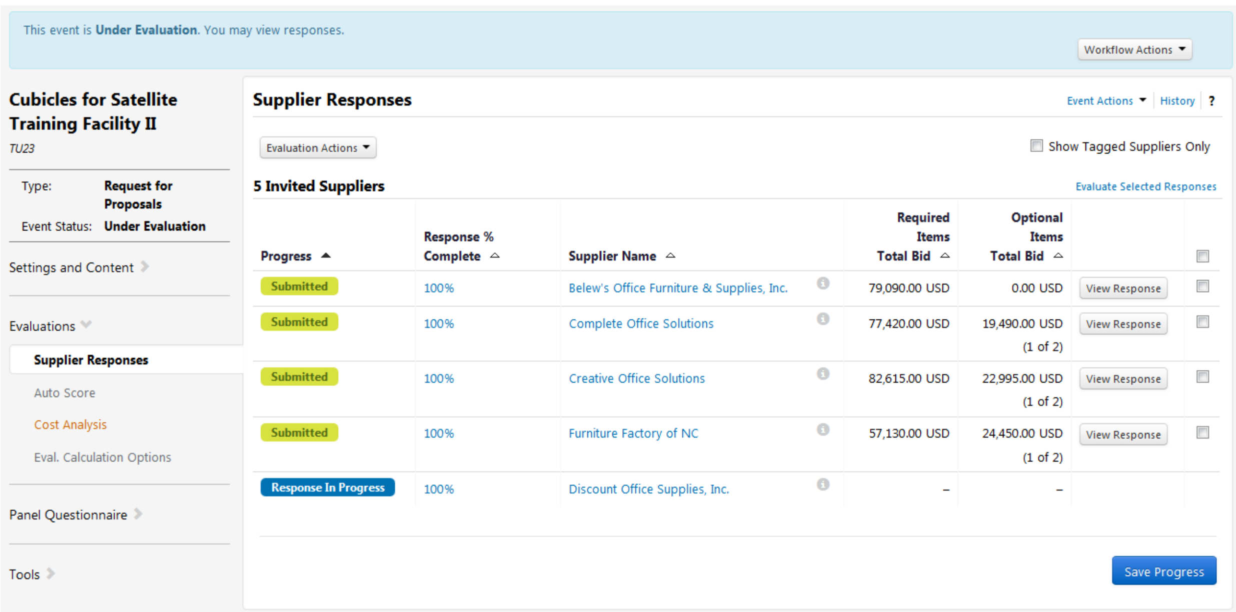
When selecting the action button (Respond Now, View, Preview):

- If a vendor is already logged into their portal, the user will be directed to the requested Sourcing Event in the portal.
- If a vendor has a portal but is not logged into their portal, the user will be directed to the Portal Login page. Upon login, they will be directed to the requested Sourcing Event.

- If the vendor does not yet have a portal, they can register on the Portal Login page by selecting Create Account. Upon confirmation of account creation, the user can log in and be directed to the requested Sourcing Event.

Vendor Response (Adapted from SciQuest's Sourcing Director Handbook)

Vendors may begin responding to an event upon the event Released date. As a user with permission to see the event, you may review vendor responses at any time. Once the Close date for the event passes (or it is closed early), the event enters Evaluation workflow. You may then evaluate responses in comparison to each other using evaluation tools, and a response may be awarded.
Vendor Response Page: Once an event is released to vendors, they can begin responding. A **Vendor Responses** page will display in the Event Navigation under the **Evaluations** section.



All invited vendors are shown on the page with information about the vendor's response status:

Progress - An indication if the vendor has viewed the event, declared an intent to bid, in the process of responding or has submitted a response. You may select to sort responses on this field.

Response % Complete - Displays how much of the required information for the event the vendor has completed. A number displays once a vendor has viewed the event. Select the number to see details of the required information completed. A value is NOT shown if the event is sealed and still in the Open status. The sealed date must have passed to see a value.
Vendor Name - The vendor who submitted the response. Clicking on the name will allow you to navigate to the Vendor's profile.

- Select the icon next to the Vendor Name so see the Vendor's DBA name, if applicable, as well at the invited contact names and email addresses.

- Icons indicate if the vendor responded via the public site, and if the vendor is included on the Panel Questionnaire (if configured)

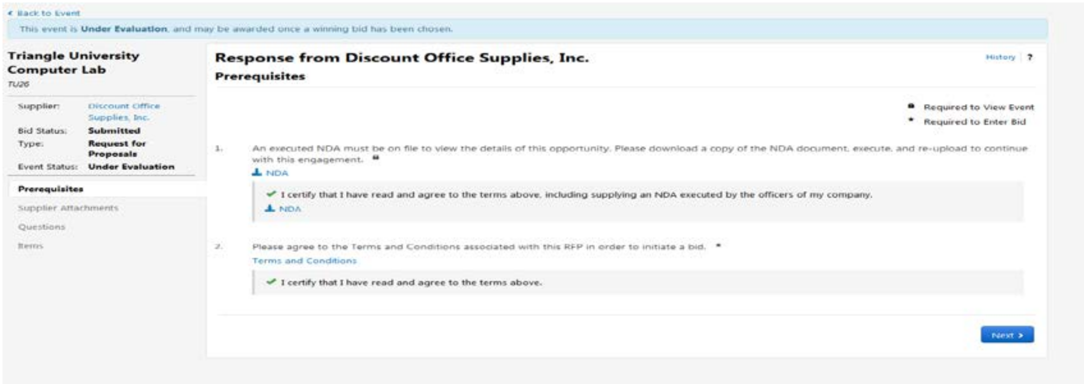
Total Bid - The total bid from the vendor for the event (if applicable). Some event responses do not include bids. If the event has both required and optional items for bid, two columns are displayed: Required Items Total Bid and Optional Items Total Bid, with the appropriate values showing for each.
View Response - Click on this button to view the details of the vendor's response.
Evaluate Selected Responses - If you do not want to evaluate all responses from the Evaluations Actions drop-down, you can select specific Vendor responses and click this hyperlink to include only those vendors in the evaluation.
Resend Vendor Invite - If the vendor has not responded to the invitation, you may select to resend it to the appropriate vendor contacts.
A drop-down of **Evaluations Actions** is available that allows you to configure the vendors to include in your evaluation:

- **Evaluate All Responses**- to navigate to a summary page of all responses and take further actions on each response, make recommendations, or select to award.
- **Evaluate Selected Responses** - this option shows only if you have selected one or more responses on the page. Selecting this option after selecting specific vendor responses will take you to the side-by-side navigation with only the selected vendors.
- **Export All Responses** - to export the information to an Excel file for further analysis.
- Add Selected to Panel Questionnaire - This option is only available if you have selected one or more of the vendor responses and you have a panel questionnaire configured for the event. Select to add the vendors to the panel questionnaire.
- **Tag Vendor(s) for next stage** - If you are creating another stage for the event, you may select vendors that will be added to the next stage.
- **Untag Vendor(s) for next stage** - If you have tagged vendors for the next stage of an event, you may select vendors to untag so they will not be moved to the new stage.

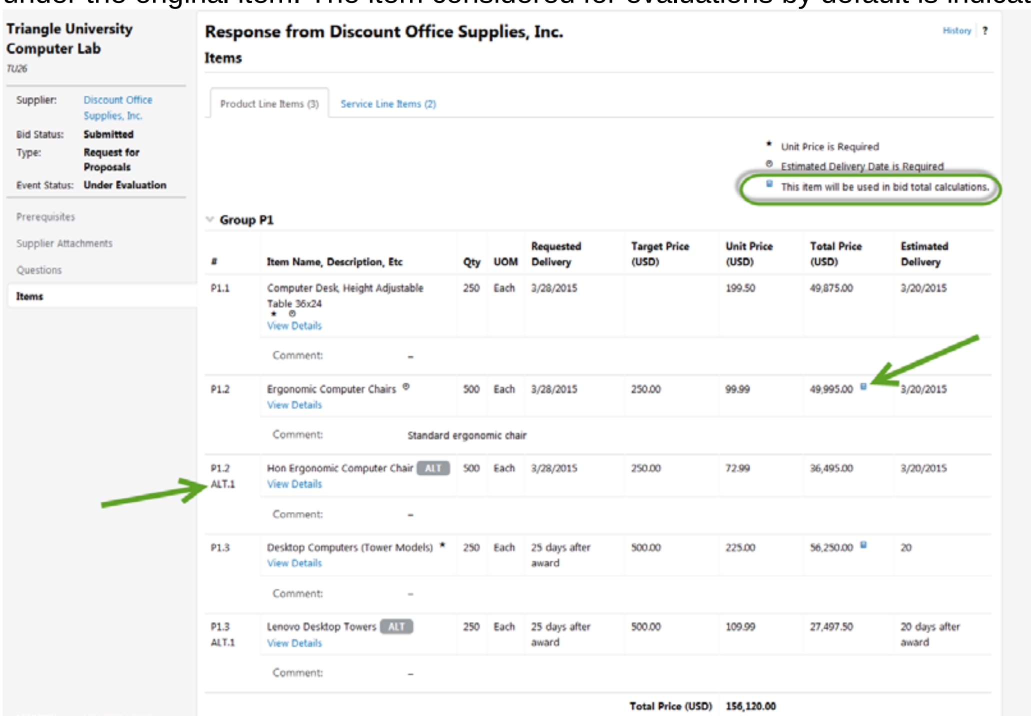
If you have saved any evaluation scenarios, a Load Saved Scenario button displays. Select and choose which scenario you would like to view. Event Actions are available to copy or export the event. If the event is configured to allow proxy bids, you will also see the option to Designate Vendors for Proxy Bidding in the Event Actions drop-down. If you are an approver, you will see a drop-down for Workflow Actions where you may choose from options appropriate for your user permissions and status of the event. See Evaluation Workflow for additional information.

Specific Vendor Response Pages

When you have selected the **View Response** button from the **Vendor Responses** page, you may see the responses provided by the specific vendor. Select any of the pages to see details for the vendor's response. You may view and download attachments provided by the vendor.



On the **Items** page, if alternate items were submitted, they are indicated with ALT numbering under the original item. The item considered for evaluations by default is indicated with an icon.



Panel Questionnaire Responses

Once an event is closed and the questionnaire has been configured and published, panelists will receive an email and an in-application notification indicating they have a questionnaire to complete. Panelists may navigate to the event from the email or within the application, and begin completing the requested information. The **Panel Questionnaire** page will be available to any user who has been designated as a panelist, even if that user is not specifically assigned to the project or event. A user with only view event permissions will see a limited view of the event, allowing them to only respond to the questionnaire. Those users will only see the **Panel Questionnaire** page when accessing the event. The panelist must complete their response by the Questionnaire Close Date.

On the **Panel Questionnaire** page, a panelist may select to **View Questionnaire** to be taken to the first vendor response, or to a specific vendor by selecting **Go to Vender Questionnaire**. The panelist may also choose to Export or Import the questionnaire. This is helpful if the panelist would like to edit the questionnaire in an Excel file format, and then import the responses back into the application.

- If a panelist is assigned to a group of questions, the panelist will see what questions are optional or required.
- If a panelist is not assigned to specific groups/questions, the panelist is only required to complete one group of panel questions for each vendor before submitting their panel response. However, all questions within a single group must be completed.
- Panelists enter a score for the vendor's responses to the questions according to the rating scale.
- Once the panelist has submitted their response, the panel questionnaire administrator can see the average rating or all the vendors from the panelist.
- A panel administrator can choose to export/import a panelist questionnaire on their behalf.
- The **Average Questionnaire Response** score shows when evaluating event responses.

The following is an example email a panelist receives when a questionnaire is published.

Dear Sam Stakeholder,

A new panel questionnaire is available for the following event:

Project: Office Remodeling
Event Number: TT-ORM-33
Event Title: New Cubicles for Expansion
Questionnaire Close Date: 10/16/2014 at 12:00:00 AM EDT

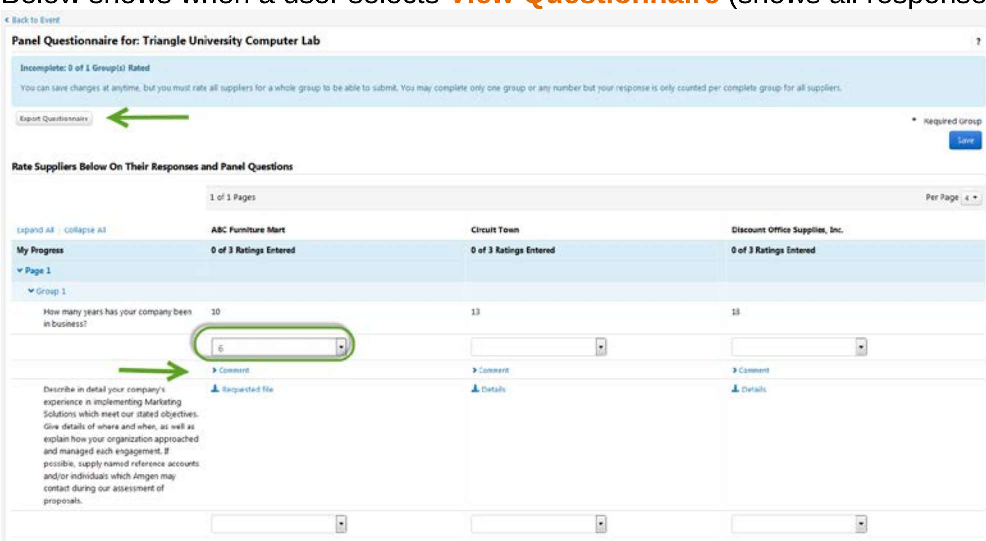
You can access the panel questionnaire here:

Please click the link to view the panel questionnaire

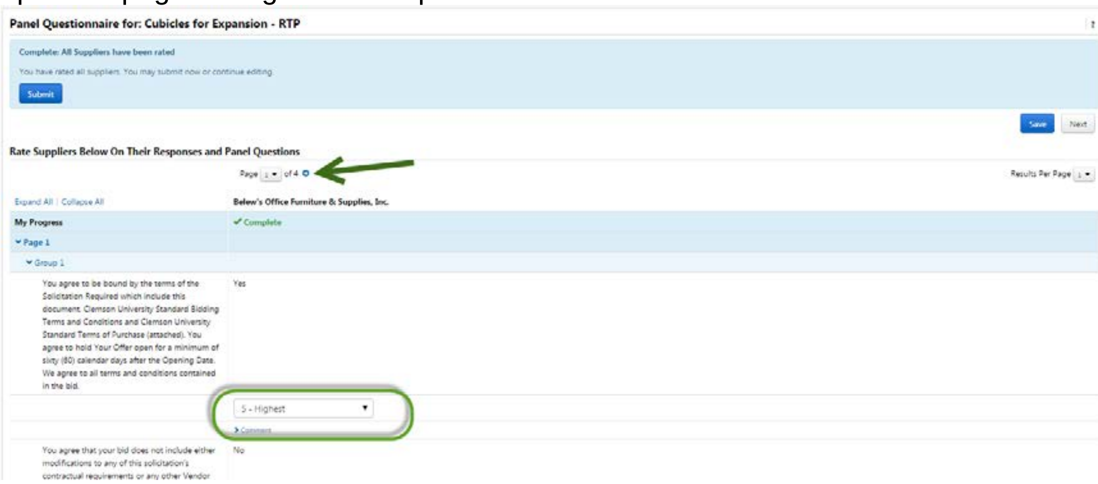
Thank You,

SQ University Sourcing

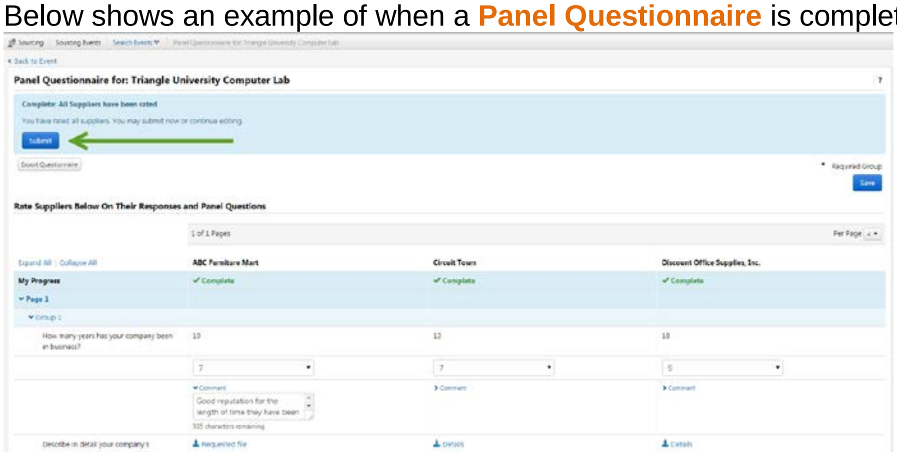
Below shows when a user selects **View Questionnaire** (shows all responses at once).



The following image shows when a user selects to **View a specific vendor**, they have the option to page through other responses.



Below shows an example of when a **Panel Questionnaire** is completed and **Ready to Submit**.



Providing Responses to Panel Questionnaires

1. Navigate to an event for which you are designated as a Panelist:
    a. Respond via the link in an email you received as a Panelist for an event.
    b. Search for an Event using Advanced Search, with the criteria being your role as a Panelist in the Panel Questionnaire section of Advanced Search. Select the appropriate event.
2. Select the **My Response** page from the **Panel Questionnaire** section of event navigation.
3. To view the questionnaire for all vendors at once, select the **View Questionnaire** button. Proceed to step 5.
4. To view the questionnaire for a single vendor, select **Go to Vendor on Questionnaire** for the appropriate vendor. You may navigate to other vendor questionnaires by selecting the **Next** and **Previous** buttons when viewing a single vendor questionnaire. Proceed to next step.

5. To export the questionnaire for completion offline, see the **Export Import My Questionnaire** task.
6. Review the vendor's responses to the questions.
   a. From the drop-down below the vendor's answer, select your score for the vendor's response, based on the organization's configured rating scale for the event.
   b. Enter an optional comment about your score or the vendor's response.
   c. You do not have to provide a score to all questions in the questionnaire, but you must answer all questions within the same group of questions, or within your assigned group of questions.
7. Click **Save** to save your responses.
8. To return to the event, select **Back to Event**.
9. When finished providing scores for all vendor responses, a confirmation shows that all vendors have been rated, and you may submit the panel questionnaire or continue editing. Select **Submit**.
10. You may select to **Withdraw** your panel questionnaire response if you would like to make changes prior to the questionnaire close date.

Export/Import Questionnaires

Export the Questionnaire

1. Navigate to an event for which you are designated as a Panelist:
   a. Respond via the link in an email you received as a Panelist for an event.
   b. Search for an Event using Advanced Search, with the criteria being your role as a Panelist in the Panel Questionnaire section of Advanced Search. Select the appropriate event.
2. Select the **My Response** page from the **Panel Questionnaire** section of event navigation.
3. Select to Export Questionnaire from any of the following locations:
   a. From **My Response** page, select **Export or Import**, then **Export Questionnaire**.
   b. From **My Response** page, select **View Questionnaire** to view the questionnaire in the UI. You may select the **Export Questionnaire** button on that page.
   c. From **My Response** page, select a specific Vendor and click **Go to Vendor on Questionnaire**.
   d. Click **Export Questionnaire** on the page.
4. An overlay displays for **Export Questionnaire**.
   a. A default **Description** is provided. Edit the description of the file, if needed.
   b. Click **Submit**.
   c. A confirmation message displays indicating the export request has been submitted. You may select the message hyperlink to navigate to the **Panel Imports and Exports** page, or select to close the overlay.
5. On the **Panel Imports and Exports** page, note the status of your requested file.
   a. Select the button to **Refresh this Page** until the status for your export request shows as completed.
6. Click the **File** name to open the file in Excel.

Editing the Questionnaire File

1. Click the Enable Editing button in Excel to allow editing of the file.
2. Note the instructions for completion on the first worksheet of the file.

3. If the questionnaire is configured to show a single vendor response per page, you will see each vendor listed on a separate tab. If the questionnaire is configured to show all vendors at once, you will see a tab with your panelist name that contains all Vendors for the questionnaire.
4. Select the appropriate vendor or the panelist name to begin completing the questionnaire responses.
5. Select a rating from the dropdown for each required question/group. You must complete questions/groups according to your group assignment. If a panelist is not assigned to a group, then the questions within a single group must be completed.
6. When finished entering responses, save the file.

Import the Questionnaire Responses

1. Navigate to the event, and the **My Response** page from the **Panel Questionnaire** section.
2. Select the **Export or Import** button, then **Import Questionnaire Responses**.
    a. Select **Browse / Choose File**, and select the file to import.
    b. A default **File Description** is provided. Edit if appropriate.
    c. Select if you would like to **Submit questionnaire response when import completes?** (Note: If you select **Yes** but not all required elements of the questionnaire are in the file, the response are imported but the file is not submitted. The panelist will receive an email indicating the questionnaire could not be submitted.)
    d. Click **Submit**.
    e. A confirmation message displays indicating the import request has been submitted. You may select the message hyperlink to navigate to the **Panel Imports and Exports** page, or select to close the overlay.
3. On the **Panel Imports and Exports** page, note the status of your imported file. Select the button to **Refresh this Page** until the status for your import request shows as Completed.

Review Panel Questionnaire Responses

1. Navigate to an event that is **Under Evaluation** and for which the **Questionnaire Close Date** has passed.
2. Select the **Panelists** page from the **Panel Questionnaire** section of event navigation.
    a. Select the button to **View Panelist Response** for each panelist response you want to review.
    b. Scroll through the panelist score and comments for each question. Use the pagination within the questionnaire pages to see all vendors and questions rated. Expand and collapse questions, pages and groups as needed.
    c. Select **Back to Event** to return to the **Panelists** page and select another panelist response to review.
3. Select the **Vendors** page from the **Panel Questionnaire** section of event navigation. Note the Average Rating from Submitted Panelists.
4. Select the **Vendor Responses** page of the **Evaluation** section of event navigation. Refer to **Evaluate Vendor Responses** for information on including panel questionnaire responses as part of the overall evaluation.

Evaluation (Adapted from SciQuest's Sourcing Director Handbook)

View Evaluations Page

1. Search for an Event with a status of **Under Evaluation**.
2. Select the appropriate **event number** you would like to evaluate to open the event details.
3. Select the **Vendor Responses** page for the event.
4. From the **Evaluations Actions** drop-down, select **Evaluate All Responses**. Or, select specific vendor responses, and select **Evaluate Selected Responses** from the **Evaluations Actions** drop-down.
5. Click the **View Scenario** drop-down, and select from one of the common scenario's. View results.
6. Select to **Sort Bids** by various selections.
7. Expand the product or service line items to see individual items.
8. If comments are present, select **See full comment** hyperlink to see the complete text.
9. If you would like to return to the event to see other details of the Vendor's response, select **Back to Event** hyperlink.

Evaluate Vendor Responses

1. Search for an Event with a status of **Under Evaluation**.
2. Select the appropriate **event number** you would like to evaluate to open the event details.
3. From the **Vendor Responses** page, select the **Evaluation Actions** dropdown, and select to **Evaluate All Responses**. Or, you may select specific vendors on the page, and select the link to **Evaluate Selected Responses**.
4. Click the **View Scenario** drop-down, and select from one of the common scenario's. View results.
5. Click to **Reset** the page to have no scenario's.
6. Select to **Sort Bids** by various selections.
7. If a Panel Questionnaire was configured and the Questionnaire Close Date has passed, note the **Average Questionnaire Rating** for each vendor. To view the details for the panelists responses to the questionnaire, see **Review Panel Questionnaire Responses**.
8. Note the **Auto Score** and **Cost Analysis** information, if configured for event. You may see the individual question score and cost adjustments when expanding the question information.
9. Pick one of the Vendors and in the drop-down next to the vendor name, select to **Pin** it to move it to the beginning of the table. You can select to **Unpin** if desired.
10. Expand the product or service line items and evaluate responses on individual items.
11. Expand question information and evaluate responses.
12. Select one or more product and/or service line items, select the **Actions for Selected Items** drop-down, and select one of the options.
    a. The page refreshes with Pending Award noted for the vendor you selected for the items.
    b. The **Award Scenario** column displays the name of the vendor awarded for the items.
    c. The **Scenario Breakdown** tab now shows, where you can see the results of this scenario.

13. Click the **Save As...** button, and enter a name for the Scenario you just created.
14. You may select to **Export** the Scenario, or All Responses.
15. When satisfied with a scenario, click **Finalize Award**.

Export All Responses for an Event

1. Search for an Event with a status of **Under Evaluation**.
2. Select the appropriate **event number** you would like to evaluate to open the event details.
3. Select the **Vendor Responses** page for the event.
4. To export from the **Vendor Responses** page, select **Export All Responses** from the **Evaluations Actions** drop-down. Proceed to step 6.
5. To export from the Evaluations page, select **Evaluate All Responses** from the **Evaluations Actions** dropdown. Then, select the **Export** button, and **Export All Responses.**
6. Enter a **Description** for the Export file, and click **Submit**.
7. A confirmation indicates your export request has been submitted. Click the hyperlink message to navigate to the **Sourcing > Sourcing Events > View Exports > Evaluations** page.
8. Select the file name to open in Excel.

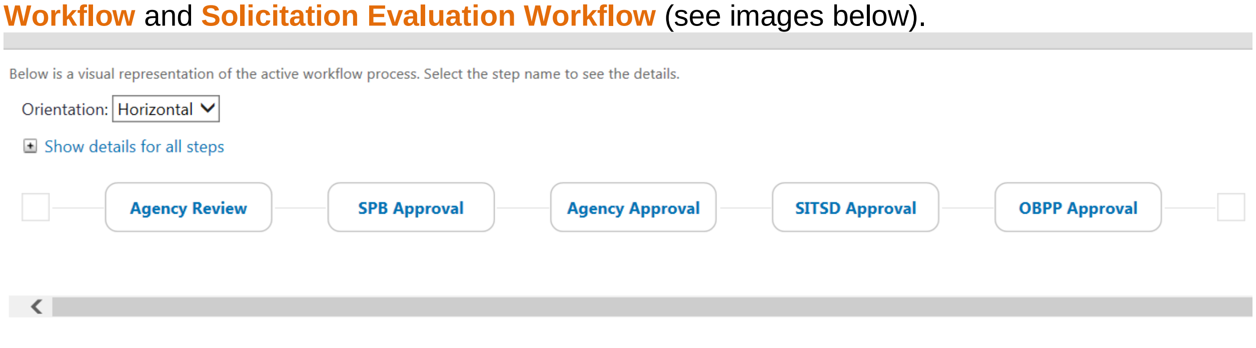
Additional Instructions/Information

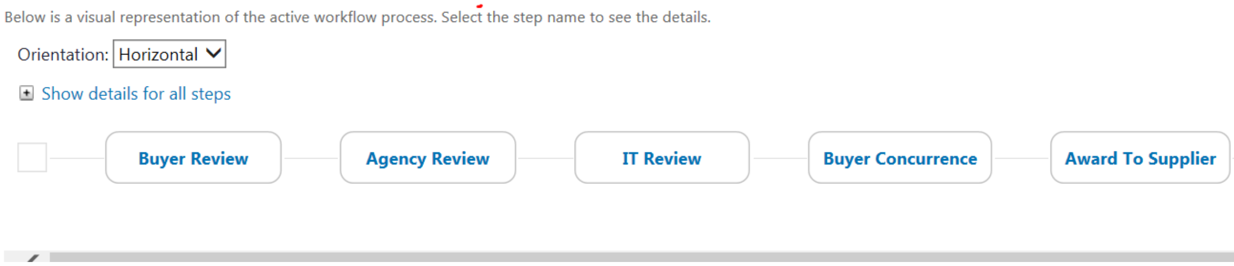
Workflow for eMACS

The workflow for the eMACS system is a two-part process. The workflow is administered and maintained by the SPB. **Each Project Administrator has been added to these workflow steps by the SPB**.
Changes to the workflow can be sent to SPB at [eMACS@mt.gov.](mailto:eMACS@mt.gov)

Workflow Process

The workflow process begins when a sourcing event is submitted and continues through when the event is awarded to a vendor. It is a two-part process: **Solicitation Event (Approval) Workflow** and **Solicitation Evaluation Workflow** (see images below).





The design of an organization's workflow varies from simple to complex depending on the business needs and sourcing practices. The goal of workflow is to make sure that all events sent to vendors, and all events awarded to vendors, are valid. For example, workflow may involve project level approvals. In other cases, it may verify that items on the event with certain commodity codes are taken through a specific approval process.

Rules are events or "things" that trigger a step in the workflow process. For example:

- A specific commodity for a vendor
- An estimated or finalized value for the event
- A specific vendor that has been invited to or has responded to the event
- A specific diversity classification for a vendor

Workflow Steps

There are four different types of workflow steps:

Manual Approval Step – This type of workflow step requires human intervention in order for the step to be completed. One or more approvers must review the event and choose an appropriate action.

Automated Approval and Rejection – This type of step evaluates certain set of criteria and the system determines whether or not the event should be approved or rejected. This step requires no human intervention. For example, an automated step may look to see if the sourcing event value exceeded commodity code criteria and if so, the order is auto-rejected.

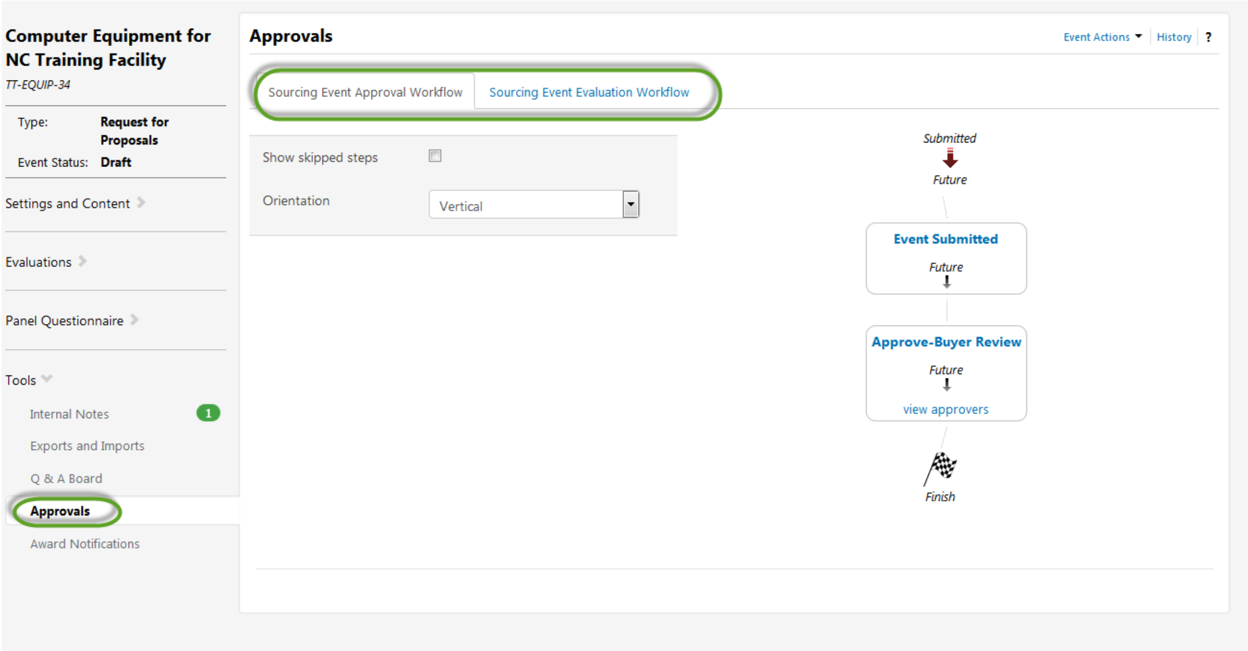
Automated (System) Step – This type of step performs a certain action in the system and requires no human intervention. This type of workflow step is not evaluating criteria for action, but instead is moving the event along in the process. An example is the external vendor check robot that sends vendor profile information to the customer for external validation.

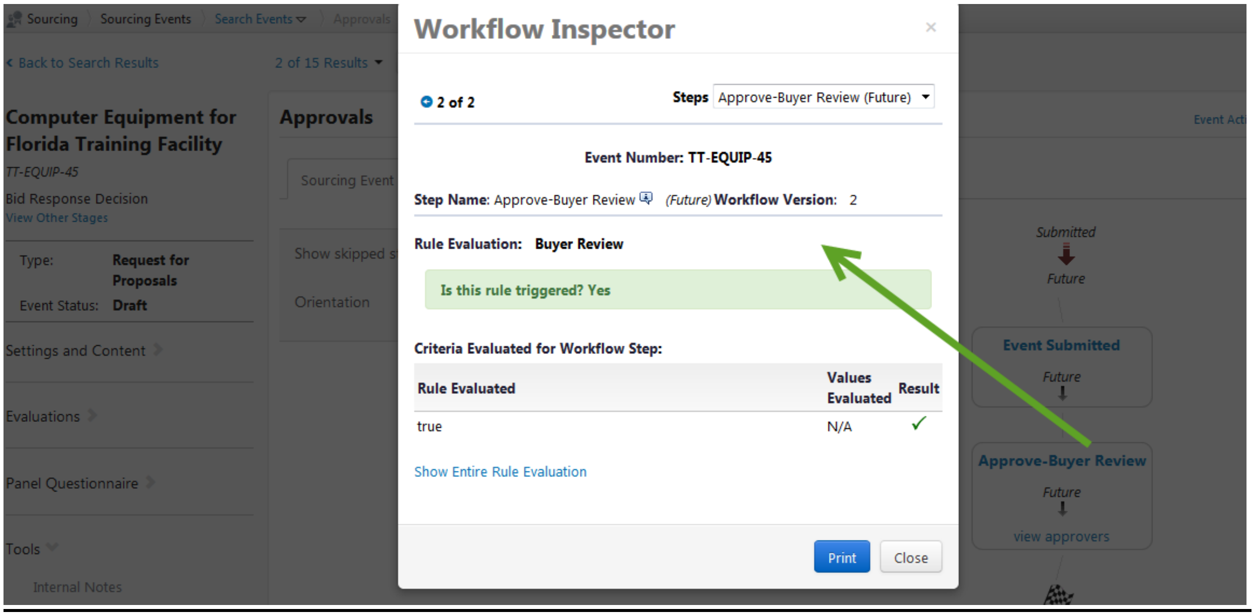
Notifications – This type of workflow step evaluates certain criteria and sends a notification to the users that may be interested in the information. For example, an organization may not require its Diversity team to approve events for/from diverse vendors, but want them to "know" about these events, so a notification is sent. The user can view the information, but they are not required to take action on the event before it moves to the next step in the process. Rules can be written requiring manual approvals, automated approvals, automated rejections, and notifications.

Viewing Workflow Steps

There may be times when you have questions about an event's behavior as it moves through workflow. An event may stop in a particular step and you need to know why. Or, conversely, an event may move through that same step without stopping. The workflow inspector tool allows you to view the data that caused the behavior of document in a workflow step. Workflow steps can be viewed in the system by viewing the sourcing event and looking at the **Approvals** page under the **Tools** section. Two tabs are available for Sourcing Event Approval Workflow and Sourcing Event Evaluation Workflow.

By selecting a workflow rule, the Workflow Inspector displays the details about the step and if the criterion for the step is present in the event. Users with workflow configuration permissions may also view the details of the process on the **Workflow Process** tab when viewing Approval Workflow setup or Evaluation Workflow setup. You may click on a workflow step to see details about the activity, folder and approvers.





Entering Proxy Bids

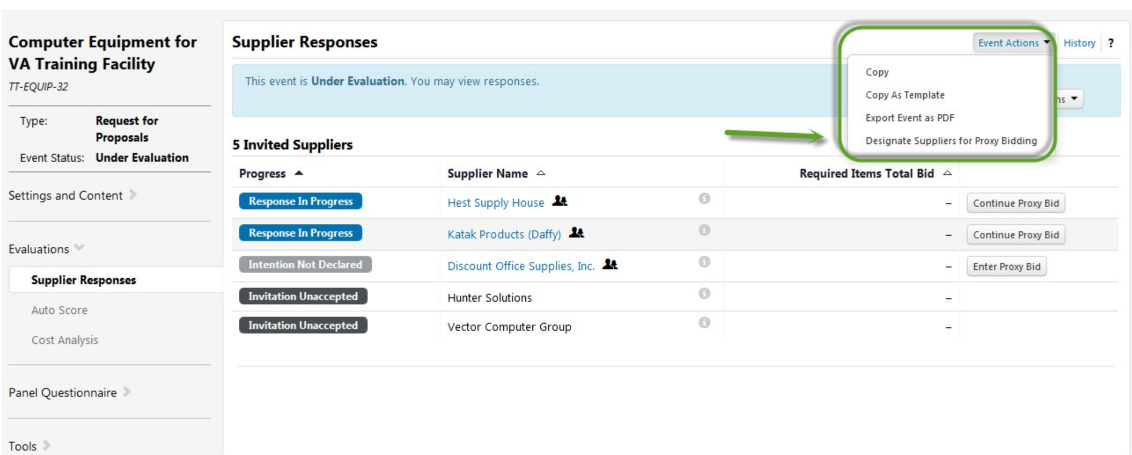
To enter a proxy bid, a vendor must be registered and manually invited to the event PRIOR to the closing date and time. If the vendor is not registered and invited prior to the close date, you will be unable to enter a proxy bid on their behalf.

There will be a prerequisite that the vendor must notify the contracts officer prior to the closing date if they are going to submit a paper bid. Upon notification, the contract officer must manually invite the vendor to the event and to register. If the vendor does not register, the responses must be pulled from the system and the bid tab created manually.

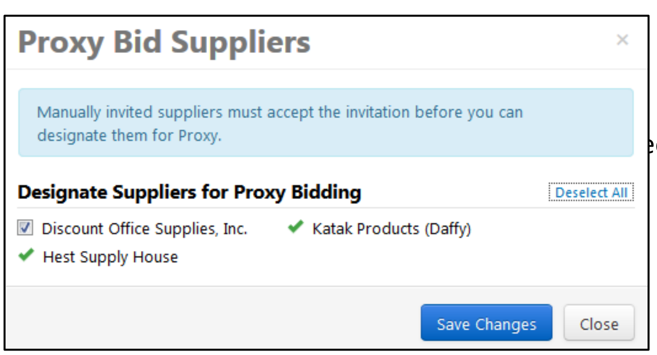
Once the event is Open, a user with the **CreateProxyBid** permission and is an Event Creator or Owner will designate for which suppliers a proxy bid may be provided on the **Supplier Responses** page. If proxy bids are allowed for sealed bid events, suppliers cannot be designated for proxy bid until the sealed bid open date has arrived. Proxy Bids can be designated up until the Event is Awarded. Event suppliers who are available for selection are as follows:

- Event suppliers who have not yet **submitted** a bid are available.
- Manually invited suppliers who have not responded by registering for a supplier portal will not show. If a manually invited supplier has registered and has a supplier portal, they will show.
- If a proxy bid has already been started, the supplier name will show as read-only can the proxy bid designation cannot be removed.

Once designated as a proxy supplier, an icon is displayed next to the supplier name for easy identification. A button displays for **Enter Proxy Bid** or **Continue Proxy Bid**. You can choose to deselect a sup- plier for proxy bid if a response has not been started. Manually invited suppliers who have not registered as a supplier cannot be selected.



Proxy Bid Selection



Manually Inviting Vendors

Customers may invite suppliers who are not currently in the supplier master database to participate in a sourcing event. A supplier record is not created unless a supplier responds to the invitation. Customers may manually add suppliers to the event through the UI, or via an import process.

1. Search for an Event and select the appropriate Event Number from search results.
2. Select the **Vendor** page of the event. Select the **Add Vendor to Event** tab.

Adding a Vendor via Invitation

1. Select the **Manually Invite Vendors** button, then **Add Vendor to Event**. An overlay displays.
2. Enter a **Vendor Name** (required).
3. Enter an optional **Sales or Corporate Contact Name**.
4. Enter a valid **Email** address (required).
5. Select to **Save** to return to the **Add Vendor to Event** page. Select **Save and Add Another** to invite additional suppliers.
6. Manually invited suppliers show on the **Event Vendors** tab without a hyperlink to the supplier profile, since the supplier record is not created unless the supplier responds to the invitation.

Adding a Vendor Via Import

To access the import template:

1. Select the **Manually Invite Vendor** button, then **Get Import Template**. Select to open or save the file.
2. Click the **Enable Editing** button in the spreadsheet.
3. Review the **Instructions** worksheet in the file.
4. Enter the appropriate information in the **Import Data** worksheet.
   a. **Vendor Name** is required.
   b. You may enter an optional **Sales or Corporate Contact Name**.
   c. A valid **Contact Email** address is required.
5. When all suppliers to manually invite are entered, save the spreadsheet in **.xls** or **.xlsx** format.
6. On the **Add Vendors to Event** tab of the **Vendors** page in the event, select **Manually Invite Vendors** button, then select **Import**. An overlay displays.
7. Select an **Import Action**. **Validate** is the default action, which will simply check the file for errors and will not import the file. Select **Import** to import valid supplier rows into the event.
8. Select if you want to receive an **Email When Import Is Ready** or not. Depending on the selection for the **Sourcing - Import** or **Sourcing - Validate Notification Preference** in your user pro file, **Yes** or **No** will be selected for you, but can be changed for this request. Select the **What's This** hyperlink in the overlay for more information.
9. Browse and select a **File Name**.
10. Click **Submit** to import (or validate) the file.
11. A confirmation message display that the suppliers have been submitted.
12. Navigate to the **Exports and Imports** page of the event under the **Tools** section of the event. The requested file status will display. You may select to **Refresh this Page** until the status is **Completed**. If there are any errors, you

may download and open the file to review. Rows without errors are processed. Once the request completes the import process, you may view the updated suppliers on the **Event Vendors** tab on the **Vendors** page. Manually invited suppliers show without a hyper- link to the supplier profile, since the supplier record is not created unless the supplier responds to the invitation.

13. Event **History** captures the suppliers added to the event.