

Navigating ESM Solutions to Respond to UT Solicitations

The UT Offices of Procurement Services have provided this document for informational purposes to help vendors navigate UT's electronic sourcing system. UT's sourcing system is supplied and managed by ESM Solutions. This document highlights the main steps for using ESM Solutions to respond to UT solicitations, and is not intended to cover all possible scenarios.

**Vendors are responsible for seeking clarification, technical assistance,
and additional information as needed.**

UT is not responsible for vendors' errors or failure to submit responses.

For questions about a specific UT solicitation:

- Contact the buyer responsible for the solicitation.

For questions or technical assistance with the ESM platform:

- Visit ESM's support webpage, <https://support.esmsolutions.com/hc/en-us>.
- Call the ESM Solutions support line, (877) 969-7246, ext. 3.
- Email the ESM Solutions support team at support@esmsolutions.com.

Navigating ESM Solutions to Respond to UT Solicitations

Getting Started

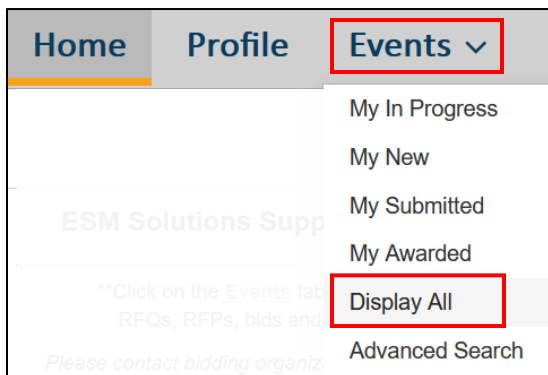
If you have not already registered in ESM Solutions, refer to separate instructions on how to register, <https://procurement.tennessee.edu/bid-registration/>.

Log in to ESM:

- Click on the link in the email notification or click here: <https://eprocurement.esmsolutions.com/>.
- Enter your email address and ESM password.
- If you need to reset your password, click “Forgot Password” and follow the instructions.

Search for the solicitation:

- The site will open to the “Home” page. For easier searching, hover over the “Events” drop-down and select “Display All.”



- Enter a key word to search for the solicitation and click “Search.” Or, simply scroll through the list.

selection: search:

Open the solicitation:

- Click on any of the hyperlinks to open the solicitation.

<u>Event Number</u>	<u>Event ID</u>	<u>Event Name</u>	<u>Customer Name</u>	<u>Due By</u>	<u>Publication Date</u> ▼	<u>Status</u>
5730	2372046-04/22/2021 11:30-McCarter	Request for Quotation:Gym Floor Covers	University of Tennessee	05/11/2021	04/26/2021	New

Header Section

Review the event header section:

- Locate the “Due by Date.” IMPORTANT - note whether the time is listed as Eastern Time or Central Time as UT has procurement offices in both time zones.

Due By Date: 05/17/2021 2:00 PM **ET**

- Locate “Attachments” and click on the link to download the solicitation document(s).
- Save the attachments to your desktop. Later, you will enter your responses on the attachments and then upload them back in the system.

Attachments: [attachments \(1\)](#)

IMPORTANT: read all solicitation documents carefully and make sure you respond to all items.

- Locate “Terms and Conditions” and click “view.”

Terms and Conditions: [view](#)

Some of UT’s solicitations include the Terms and Conditions here and other solicitations include the Terms and Conditions in the solicitation document. Find and read the Terms and Conditions. If you have questions about the terms and conditions, contact the buyer responsible for the solicitation.

- After reading the Terms and Conditions, scroll to the bottom of the Terms and Conditions box and check “I accept the customer’s terms and conditions.”
- Click “Update.”

Response Terms and Conditions
University of Tennessee is not accepting response terms and conditions for this event.

I accept the customer's terms and conditions

[Print](#) [Update](#) [Cancel](#)

- Look for any addendums to the solicitation. If there are addendums, there will be an “Addendum History” link in the right-hand column of the header section. If the link is visible, click on it to read the addendums.

Addendum History : [view](#)

If you receive an email stating there is an addendum, log into the solicitation to read the addendum. If you have already submitted your response and need to make changes because of an addendum, click the red “Retract” button at the top of the page to make changes. **Remember to re-submit your response after making changes.**

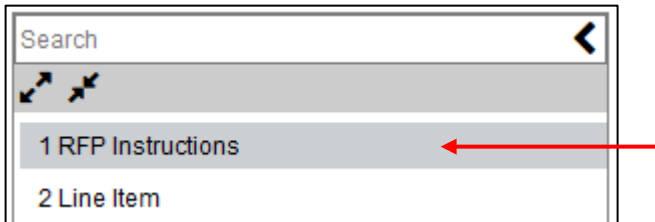
[Retract](#) [Print](#) [Back](#)

Event Sections

The event sections are located under the header section.

Locate the Search box on the left-hand side of the screen:

- Depending on the type of solicitation, there may be one or more sections in the search box.
- Click on the section titles to open sections. Sections will open on the right-hand side of your screen.



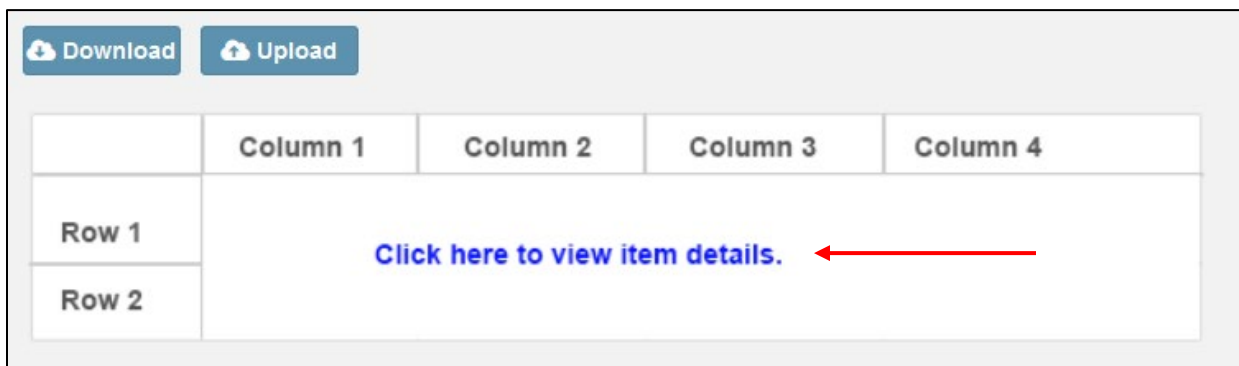
IMPORTANT tips for working in the event sections:

- Scroll all the way through each section and read all instructions carefully. It is important that you respond exactly as instructed.
- **IMPORTANT:** For certain types of solicitations, there may be additional attachments in the event sections. Scroll to the bottom of each event section and look for any additional attachments. If there are additional attachments, download and read them carefully.
- Look for fields and links with a red asterisk and respond as instructed.

Enter unit bid price in the line items table:

***You may need to enable pop ups for your internet browser to perform this step.**

- In the search box on the left-hand side of the screen, click on "Line item."
- For all solicitation types, you must enter a value in the "Unit Bid Price" field in the line items table. The solicitation instructions will tell you what to enter in the field.
 - For some types of solicitations, you will enter the actual unit bid price in the line items table.
 - For other types of solicitations, you will enter your unit bid price in a separate document and enter a place holder (\$1.00 or .01) in the line items table.
- Click on "Click here to view item details" to open the line items table.



Event Sections, *continued*

Enter unit bid price in the line items table, *continued*

- Locate the unit bid price field. You may have to scroll to the right to see it.

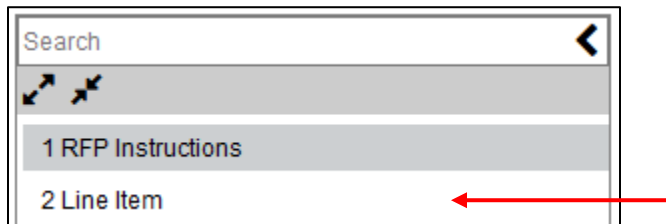
Manufacturer Provider	Manufacturer / Provider Part Number	UOM	Quantity	Unit Bid Price	Extended Bid Price	Supplier Not
		Lot	1			

- Enter the unit bid price **OR**, if the instructions tell you to enter a placeholder of \$1.00 or .01, enter the placeholder amount.
- Click anywhere outside of the field to continue working.
- Complete other applicable fields.
- Click “Update” in the upper or lower right-hand corner of the event section to save changes.
- Click on “Exit full screen” in the top center portion of the screen, to return to the events section.

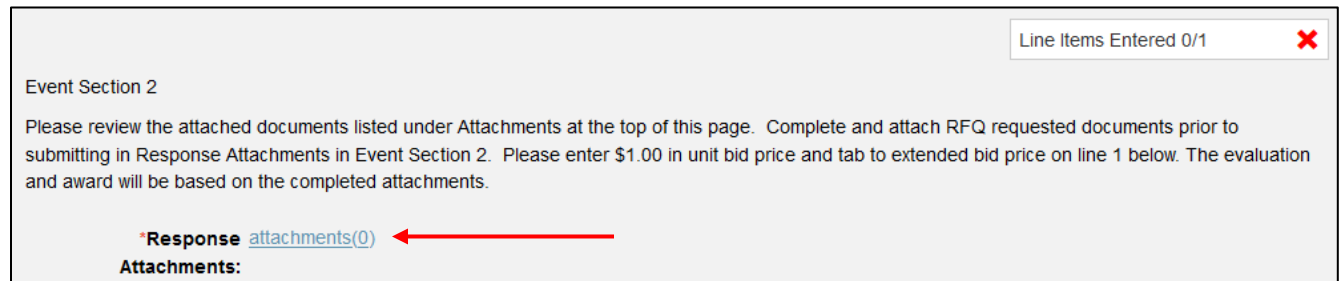
[Exit full screen](#)

Attach response document(s):

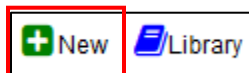
- In the search box on the left-hand side of the screen, click on “Line item.”



- Locate the “Response Attachments” link in the center of the screen and click to open the attachments dialog box.

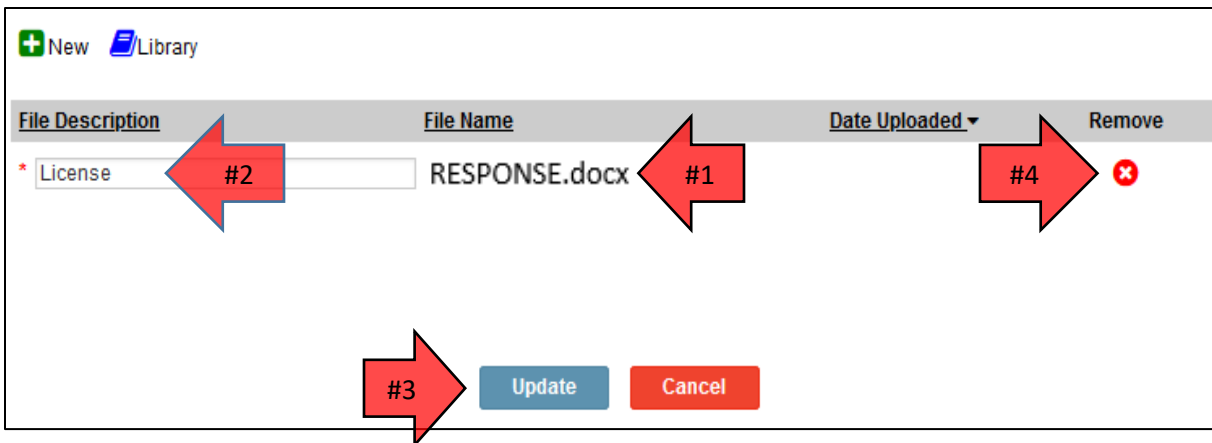


- Click on “New.”



Event Sections, *continued*

- Navigate to your response document on your computer and select it. The name of the document will appear in the “File Name” field (see #1 below).
- Type a short description for the document in the “File Description” box (see #2 below). Some solicitations will specify how you should describe the documents.
- Click the “Update” button located *inside* the attachments dialog box (see #3 below).
- Repeat these steps for each document that you need to upload.



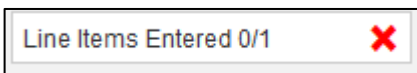
- If you upload the wrong document, click the “Remove” button (see #4 above).
- When you have finished uploading all of your response documents, click one of the “Update” buttons located *outside* of the attachments dialog box. The buttons are located in the upper and lower right-hand corners of the event section.



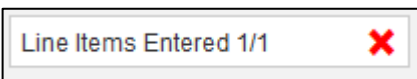
Final Steps

Check your work:

- Re-read all solicitation documents and instructions. Make sure you have responded to all items.
- Check the status boxes on the right-hand side of your screen.



This message indicates that you need to enter cost(s) in the unit bid price field(s) and you *may* need to upload documents.



This message indicates that you need to upload documents.



This message indicates that you have entered cost and have uploaded at least one document. Only you will know if you have uploaded all required documents so please check carefully.

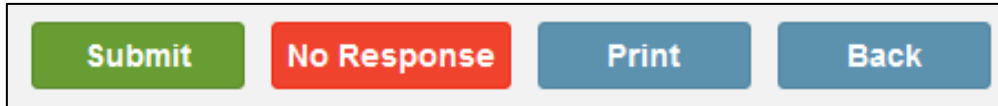
- In the events section of the screen:
 - Make sure the correct number of response attachments are listed.
 - Make sure the “Bid Price Total” is correct (actual price or placeholder price).



Final Steps, *continued*

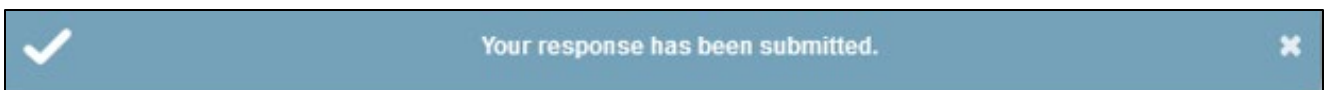
Submit response:

- If you would like to print a copy of your response, click the blue “Print” button.
- When you are ready to submit your response, click the green “Submit” button.

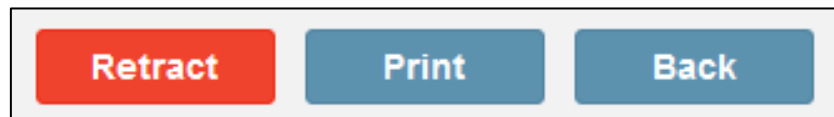


How do I know if my response was submitted?

- After clicking “Submit,” look for a blue bar near the top of our screen that says “Your response has been submitted.” The message will be visible for approximately thirty seconds.



- Another way to check your response status is to check the buttons in the upper right-hand corner of the screen. If “Submit” is no longer visible, the response was submitted.



- Vendors may contact the buyer before the response deadline to make sure the response was submitted.

What do I do if I have questions about the solicitation?

- Contact the buyer. **7/5/23 - see highlighted note below.**
 - Go to the event header and locate “Customer Name.”
 - Click on “University of Tennessee” to see the buyer’s name, phone number, and email address.



System Note 7/5/23 – *There is an issue with ESM’s customer name field. Our buyers’ contact information is not currently visible in the field. We have made ESM aware of the issue. In the meantime, you can find the buyer’s contact information in the solicitation document for each specific RFQ, RFQ-S, or RFP.*

What do I do if I have technical questions or need technical help with the ESM platform?

- Contact ESM Solutions.
 - Submit a customer service request ticket, <https://support.esmsolutions.com/>.
 - Call (877) 969-7246, ext. 3
 - Email support@esmsolutions.com.