Creating a Sourcing Project

Introduction

A Sourcing Project (SP) is a container for all information and documents pertaining to a formal solicitation for bids on goods or services. The process begins when the user clicks on the **Guided Sourcing Project** link. By default, the user who initiates the SP becomes the Project Owner. Once a SP has been initiated, the user populates the **Create guided sourcing project** fields, which trigger the appearance of either a **State of North Carolina Sourcing Process – Guided Sourcing** template or an **NCDIT Sourcing Template – Guided Sourcing** depending on the nature of the solicitation. These templates guide the remainder of the users steps in the SP creation and management process, based on the P&C or NCDIT prescribed procurement process (e.g., Phases and Tasks).

Learning **Objectives**

At the end of this job aid, **you will be able to**:

- Initiate a Sourcing Project and complete the **Create guided sourcing project** page.
- Answer the template questions.
- Understand the different aspects of a Sourcing Project, including the **Documents** and **Tasks** sections.

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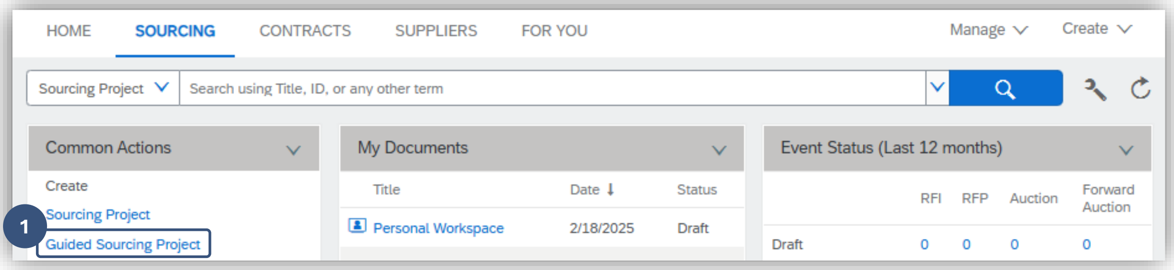
Initiate Sourcing Project and Complete the Create guided sourcing project page

1. In the **Common Actions** portlet on the left side of the screen, click the **Guided Sourcing Project** link.



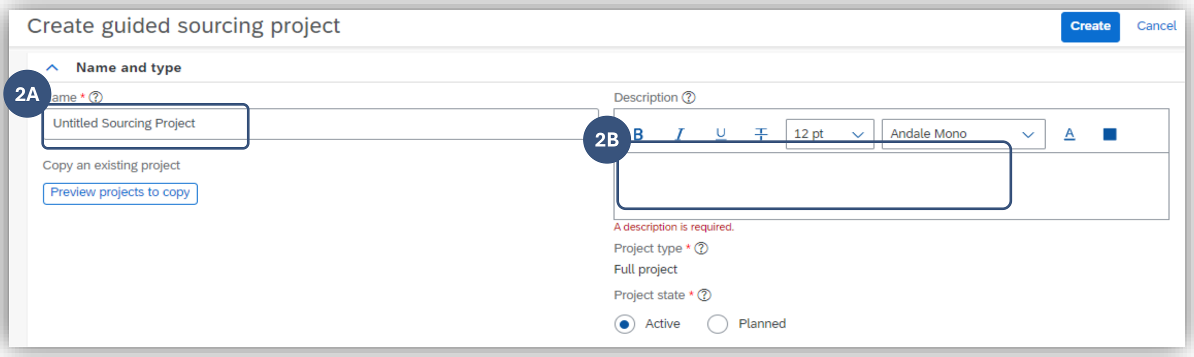
2. The **Create guided sourcing project** page will display. Populate all relevant fields, including the required fields, as noted by a red asterisk (*). Some fields are conditional, and information entered in this portion of the SP determine later options.

   A. **Name***: In the **Name and type** section, enter a title for the SP. This is an internal field that vendors will not see. It is recommended to include the word "Project" at the end of the **Name** to help differentiate the SP from the Sourcing Event.

   B. **Description**: Describe the SP being created. This is a required field even though there is no red asterisk.

> Leave the **Project type** and **Project state** fields as defaulted.

> There is an informational tool-tip icon (question mark within a circle) next to some of the fields. To display further explanation for the associated field, left-click on the icon.



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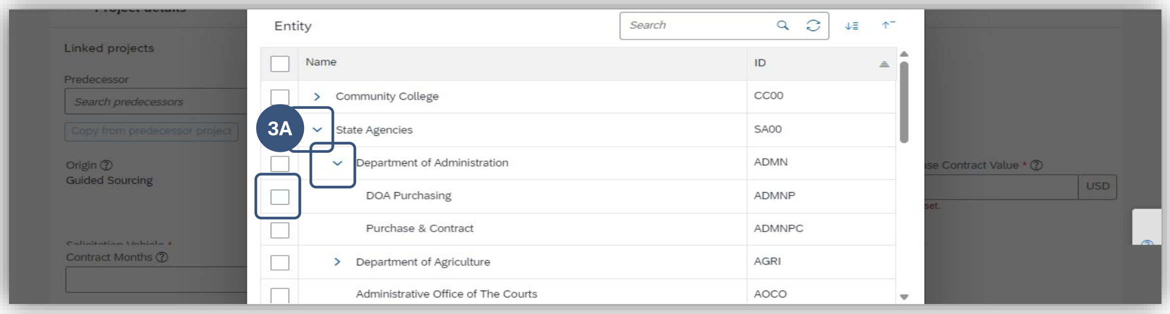
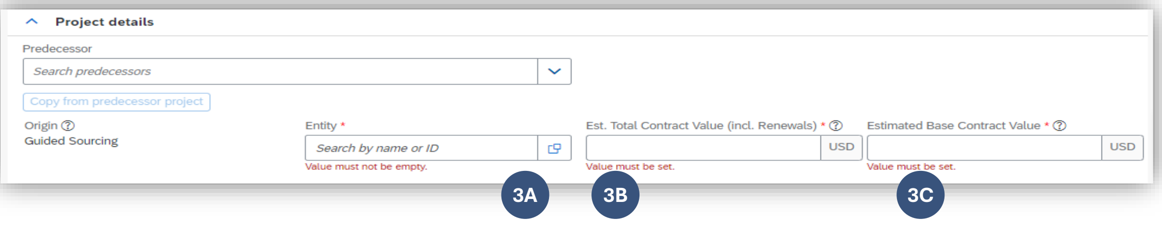
3 Scroll down to the **Project details** section and fill out the following fields in the order listed below (changing the order may cause issues in the system behavior).

A. Entity*: Select the entity that will be issuing the solicitation. Click the pop-out icon at the right of the box and then click the blue arrow next to **State Agencies** to access the list of entities. Users may search by **Name** or **ID**. For entities with sub-agencies, it will be necessary to drill down further by clicking on the blue arrow next to the entity name. Once the correct entity has been identified, check the box next to it and click **Done** to add it.



B. Est. Total Contract Value (incl. Renewals)*: This is a money field that is an estimated value of the expected contract over its entire lifetime, including possible renewal options and extensions. If the value entered in this field exceeds the delegation, approval from P&C or DIT may be required.

C. Estimated Base Contract Value*: This is a money field that is an estimated value of the contract over its base lifetime, excluding possible extensions.



D. Solicitation Vehicle*: Click the dropdown arrow to the right of the box and select one of the following options based on the nature of the solicitation:

- **1. Non-IT: Solicitation**
- **2. IT: RFP**
- **3. IT: IFB**
- **4. IT: RFQ**
- **5. IT: SOW**
- **6. IT: RFI**
- **7. IT: Exception Request Only**

This selection will activate three more fields for the Project Owner to complete when **Non-IT: Solicitation** is chosen: **Execution Strategy, Approval Scenario,** and **Special Circumstances**. These will not be applicable for any IT Sourcing Projects.

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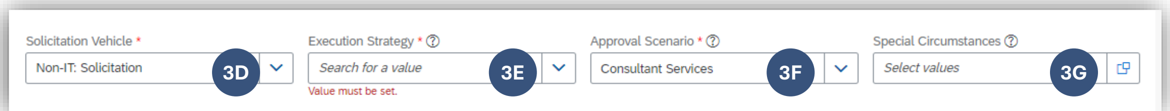
E. Execution Strategy*: Click the dropdown arrow to the right of the box and select **Lite Sourcing**.

F. Approval Scenario*: Click the dropdown arrow to the right of the box and select an option between **Consultant Services**, **Goods**, and **Services** based on the nature of the solicitation.

G. Special Circumstances: If there are special circumstances with regards to the solicitation, click the pop-out icon at the right of the box and select from the below options. Check the box next to any applicable option and click **OK**. Please see the Procurement Exceptions and RFI (Non-IT) Job Aid for further guidance.

- **Procurement Exception – Waiver of Competition**
- **Procurement Exception – Brand Specific Request**
- **Procurement Exception – Contract Duration Beyond 3 Years**
- **Special Delegation**

Selecting **Consultant Services** will add an extra task and document to the **Solicitation Document and Sourcing Event Folder** for review by P&C during the approval process.



H. Owner: The user who is the principal owner of this SP. By default, this field is populated by the user who initially clicked the **Sourcing Project** link. Additional users or groups can be added to this field in the **Team** section after the **Create** button is clicked.

I. Currency: This field defaults to **US Dollar** and should be left as is.

J. Commodity*: Select the Commodity Code that best describes the nature of the sourced item(s). Click the pop-out icon at the right of the box to access the Commodity search page. Users may search by **Name** or numerical **ID** in the search box. After identifying the correct code, check the box to its left and click **Done** to add it to the SP. More than one Commodity Code can be selected, although only the first code will appear in eVP.

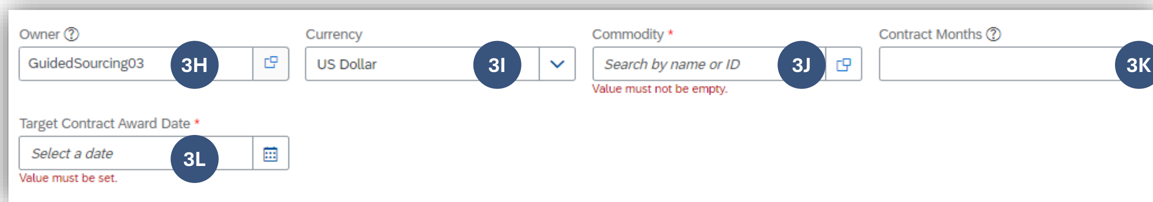
Notes:

- The Commodity Codes listed are part of the United Nations Standard Products and Services Code (UNSPSC) commodity code structure. Codes beginning with **7**, **8**, or **9** are for Services.
- UNSPSC codes are organized in groupings of two, four, and six digits, with six-digit codes providing the most detailed description of the item(s).
- Choosing a four-digit code will notify all vendors registered with any six-digit code within that family. For example, selecting the commodity code **'5610'** will cover codes **'561015'** through **'561019'**.
- The NC eProcurement guide to selecting commodity codes can be found here: https://eprocurement.nc.gov/training/selecting-commodity-codes.

Vendor contacts registered with the commodity code selected will receive an email notification about the procurement opportunity on the evening the Sourcing Event for this SP is published.

K. Contract Months: This field designates the total number of months for the contract, including Optional Extension possibilities.

L. Target Contract Award Date*: This field designates the date that the agency would like for the contract award to be approved by P&C or NCDIT to help support tracking of progress towards this key milestone during the procurement process. Click the calendar icon in the right side of the text box to select the appropriate date.

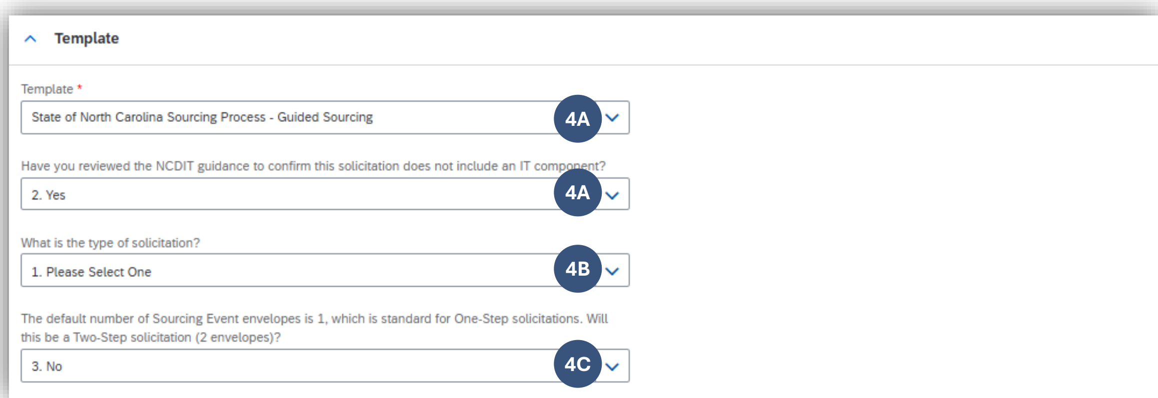


4 After filling out the **Project Details** fields, scroll down the screen to the **Template** section. Based on the selection made in the **Solicitation Vehicle** field above, either the **State of North Carolina Sourcing Process – Guided Sourcing** or the **NCDIT Sourcing Template – Guided Sourcing** template will populate, and the Project Owner will be required to answer a few questions.

A. The first question when **Non-IT: Solicitation** is selected as the **Solicitation Vehicle** will ask the Project Owner **Have you reviewed the NCDIT guidance to confirm this solicitation does not include an IT component?**. If the answer is **No**, up to five additional IT-related questions will display. If the answer to any of the questions is **Yes**, a question will display indicating **Based on your response to the previous question, this appears to be an IT procurement. Please update the Solicitation Vehicle to the appropriate IT option. Have you reviewed your selection?**. At this point, the Project Owner should change the selection in the **Solicitation Vehicle** field to an IT option and begin answering questions in the NCDIT Template per the instructions in **Step D** below.

B. If the answer to the NCDIT guidance question is **Yes**, two additional questions will display. The first question **is What is the type of solicitation?**. The choices are **IFB**, **RFP**, or **RFI**. The answer will inform the system, along with the selection made in the **Approval Scenario** field, which type of solicitation document template to populate in the SP.

C. The second question will ask **The default number of Sourcing Envelopes is 1, which is standard for One-Step solicitations. Will this be a Two-Step solicitation (2 envelopes)?**. The choices are **Yes** and **No**. For most solicitations, users should select **No** (the default value) so that all vendor responses are contained in one envelope. If a user needs to conduct a "Two-Step" solicitation, they should select **Yes**. Please see the [Multi-Envelope Events Job Aid] for further guidance.



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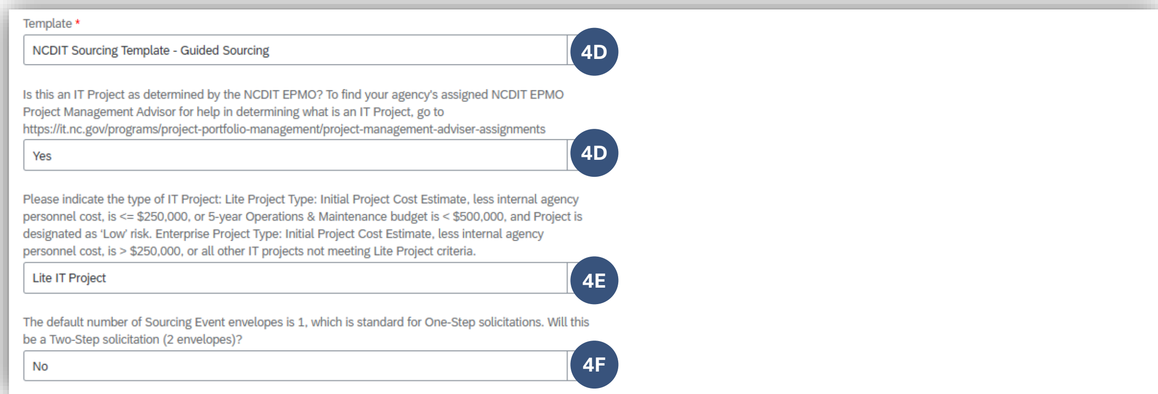
D. The first question when one of the IT options is selected as the **Solicitation Vehicle** is **Is this an IT Project as determined by the NCDIT EPMO? To find your agency's assigned NCDIT EPMO Project Management Advisor for help in determining what is an IT Project, go to https://it.nc.gov/programs/project-portfolio-management/project-management-adviser-assignments**.

E. If **Yes** is selected, the user will be asked to select the type of IT Project, with the options being **Enterprise IT Project** or **Lite IT Project**. Descriptions of each are included in the question to help make an accurate selection. If **No** is selected, skip to the final question.

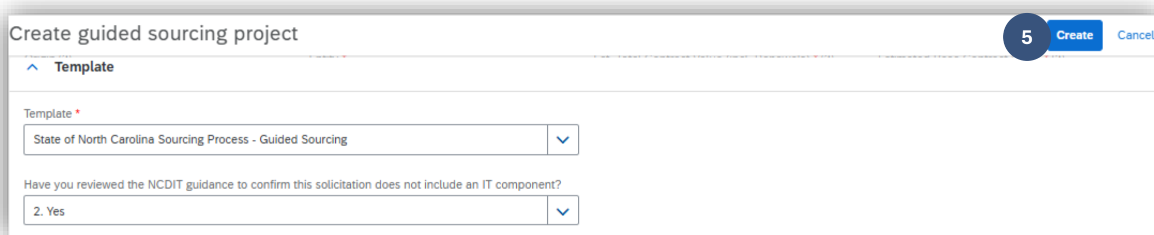
F. The final question will ask **The default number of Sourcing Envelopes is 1, which is standard for One-Step solicitations. Will this be a Two-Step solicitation (2 envelopes)?**. The choices are **Yes** and **No**. For most solicitations, users should select **No** (the default value) so that all vendor responses are contained in one envelope. If a user needs to conduct a "Two-Step" solicitation, they should select Yes. Please see the [Multi-Envelope Events Job Aid]() for further guidance.

No questions display if **IT: Exception Request Only** is selected in the **Solicitation Vehicle** field.



5 When all fields have been completed and the template questions have been answered, click the **Create** button in the top or bottom right of the screen. If any required fields are missing or there are any other issues, the system will alert the user to the missing or incorrect information by highlighting those fields with a red border accompanied by an informative error message.

Users cannot save a SP before clicking **Create**. If a SP is not completed in one session, the SP will have to be re-entered from the beginning. Once the user clicks **Create**, the SP will be saved in the system and assigned a system-generated ID # beginning with "WS".



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Sourcing Project Overview

1 After clicking **Create** on the **Create guided sourcing project** page, the Sourcing Project (SP) is saved and given a workspace number beginning with “WS”.

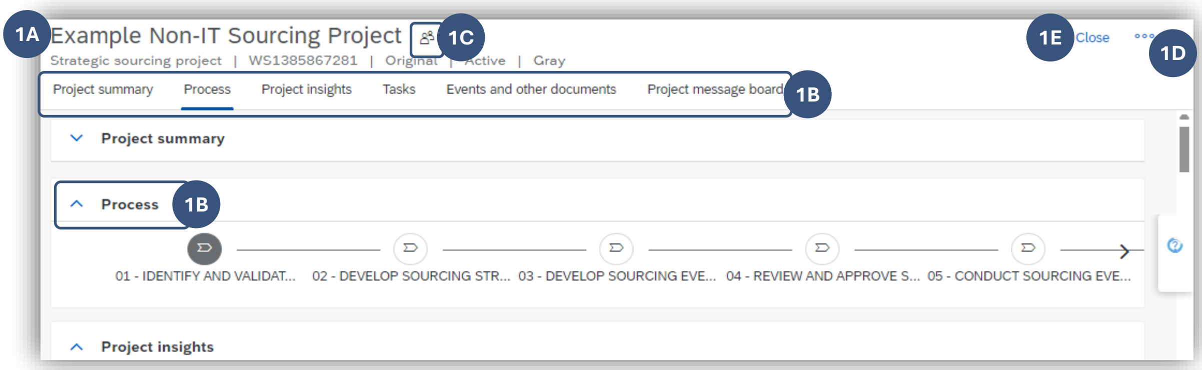
A. The SP title will display at the top of the screen along with general information about the state of the SP. Click on the title to change the SP name.

B. Below that, a horizontal listing of six project sections will display: **Project Summary**, **Process**, **Project Insights**, **Tasks**, **Events and other documents**, and **Project message board.** Below the section listings at the top of the screen, the user can scroll down the screen to find each section arranged vertically in the order in which they appear at the top of the screen. Alternatively, clicking on any of these sections across the top bar will move the screen directly to that part of the SP.

C. A two-person icon will appear to the right of the title. Clicking on this icon will open the **Team** section up in a pop-out screen.

D. Clicking on the three horizontal dots in the top of the screen will display a dropdown menu from which the user can, among other options, cancel or mark the SP complete, view the project history, create a follow-on project, or delete the project if no tasks have been actioned on to that point.

E. Clicking **Close** in the top right will send the user back to the **Sourcing** tab.



A down arrow to the left of any section title in the vertical part of the SP will minimize the section, while an up arrow will display the entirety of the sections content. Clicking the arrow will change its direction.

Throughout the SP, a **Sourcing Resources** link will display. Clicking the link will reveal a dropdown menu linking to **Sourcing Job Aids** or **eVP** for additional resources. If either page does not display within Ariba after being selected, click the pop-out icon to open it up in a different tab.

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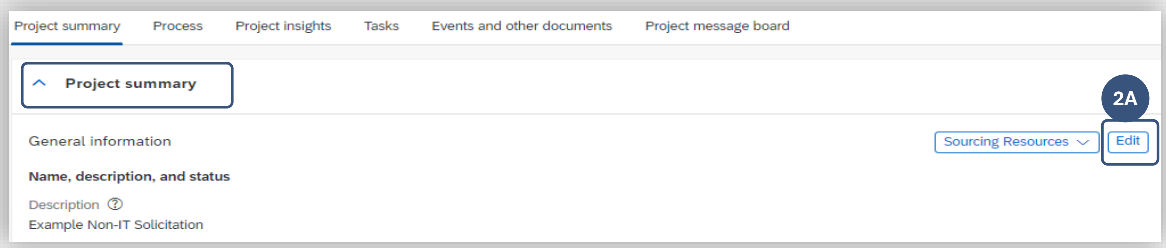
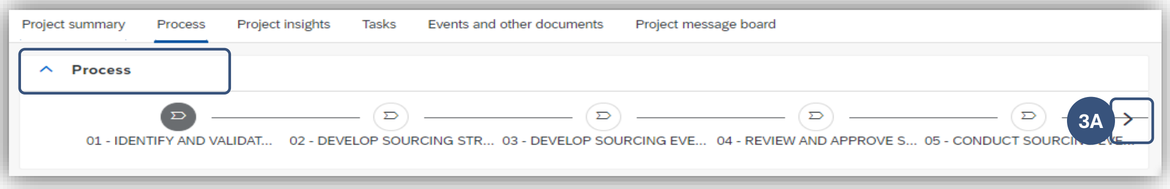
2 The **Project Summary** section contains information captured on the **Create guided sourcing project** page and is the first section displayed beneath the title section.

A. To edit any aspects of this section, click the **Edit** button in the top right of the section, update any fields or template questions, then click **Save**. Click **Cancel** if no edits are made.



3 The **Process** section lists the phases from the **Task** section. The **Solicitation Vehicle** will determine the content displayed here. When a phase is completed in the **Task** section, it will turn green in the **Process** section.

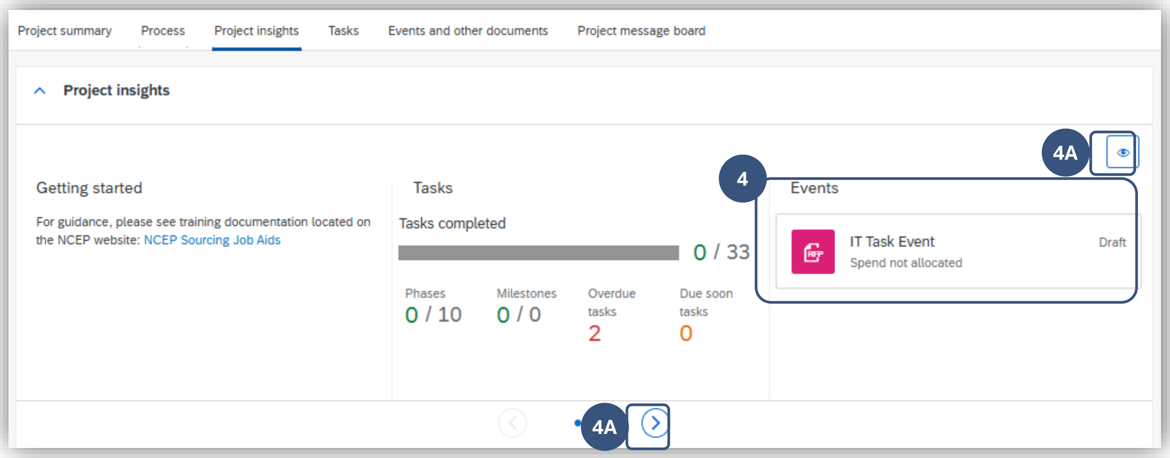
A. If all phases are not visible, click the arrow at the right of this section.



4 The **Project insights** section contains six tiles:

- **Getting Started:** Contains a link to NCEP Sourcing Job Aids
- **Tasks:** Provides a visual summary of the progress of tasks and phases
- **Events:** Provides a link to any Sourcing Events within the SP
- **Supplier participation:** Provides a visual summary of the suppliers on the Sourcing Event
- **Quick links:** Contains any quick links that have been added to the SP
- **Contracts:** Provides a link to any Contract Workspaces created from this SP

A. Click the eye icon in the top right of the section to hide any or all tiles, and click the arrows at the bottom to scroll through subsequent or previous tiles.



5 The **Tasks** section consists of phases and tasks. The purpose of phases and tasks are to provide a road map for the Project Owner to navigate the P&C or NCDIT prescribed procurement process and to track the progress made throughout the SP. There are multiple phases, each containing various tasks which will differ between Non-IT and IT SPs. There are three types of tasks in each **Tasks** section:

- **To Do Task:** A simple task that tracks an action. Users will indicate when these are completed.
- **Approval Task:** Requests approvers to approve or deny a document before it is finalized. When is granted, the system will indicate this task has been completed.
- **Review Task:** Designed to route a document to others for review, and reviewers can usually edit and suggest changes.

A. Click on a right arrow next to a phase to display the tasks with the phase. There are several default columns in the **Task** section. It may be necessary to scroll to the bottom of the section to find horizontal scroll bar to see all of the columns.

B. The **Type** column indicates whether the row is a **Phase** or a **To Do**, **Approval**, or **Review** task.

C. The **Status** column indicates at what point in the process the task is. Options include **Not Started**, **In Progress**, **Complete**, **Approved**, and **Canceled.**

D. The **Owner** column indicates who is responsible for the task.

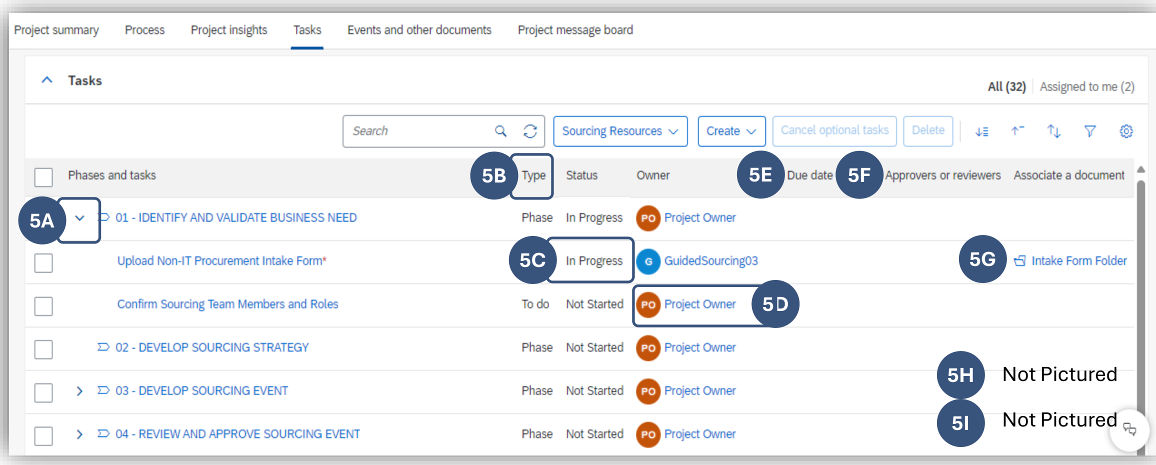
E. The **Due Date** column indicates when the task is due to be approved or reviewed.

F. The **Approvers or reviewers** column lists the approval flow associated with the task. Clicking on the listed approver will open a pop-out screen showing the entire approval flow.

G. The **Associate a document** column indicates which document folder is tied to a task.

H. The **Action** column allows users to set certain tasks to **started** or **complete** from the **Tasks** tab.

I. The **More Actions** column allows users to edit tasks. This is not advised.



It may be helpful to widen the view in the **Phases and tasks** column to see the entirety of the **Phase** or **Task** name. Move the cursor to the right of the column until a vertical blue line appears, then left-click-and-hold while dragging the line to the right.

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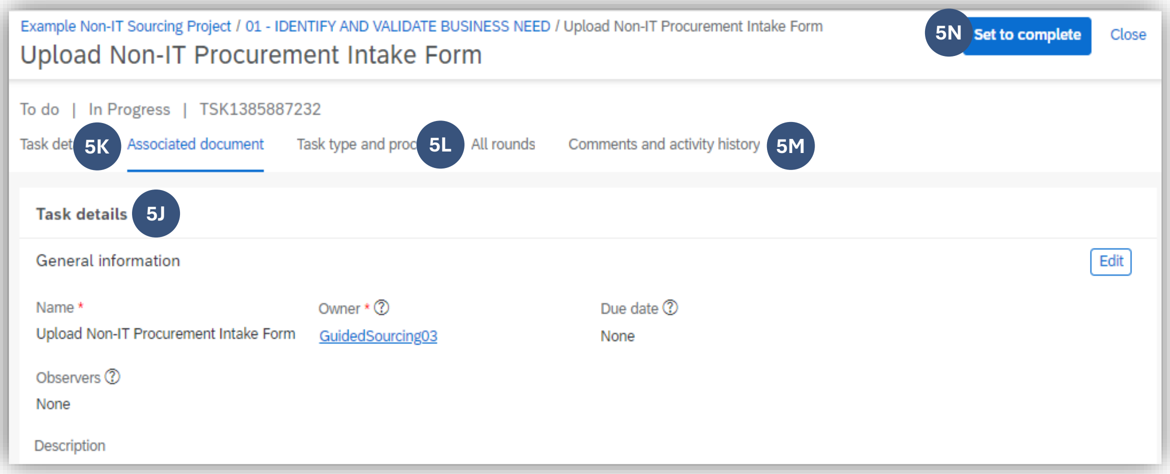
J. Clicking on a task will display the **Task details**. Sometimes the task **Name** will provide all the guidance necessary. Other times more detailed guidance can be found in the task **Description**.

K. Scrolling across the top of task from left to right will allow the user to see more information about the task. Click on **Associated document** for a link to the document folder associated with the task.

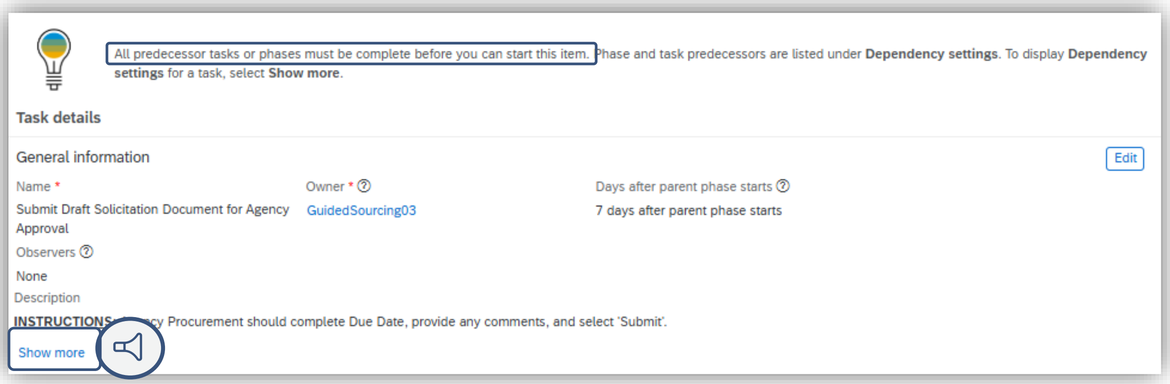
L. Click on **All rounds** to see multiple rounds of the task if it has previous been withdrawn or denied.

M. Click on **Comments and activity history** to see any comments of attachments provided by approvers during the approval process. Users can add their own comments or attachments at any time and can reply to existing comments by selecting **Reply** from the dropdown after clicking the three horizontal dots to the right of the comment. Users will be notified via email when new comments or approvals are added.

N. Some **To do** tasks will be set to **In Progress** automatically. If not, the user can manually click **Set to started** in the top right when ready. If a **To do** task has been completed, click the **Set to complete** button in the top right. If the required action has not been completed, a red warning message will display at the top of the page. Clicking **Reset** will open a completed task back up.



Some tasks cannot be started until a previous **Predecessor** task has been completed. A note at the top of the **Task Details** will alert the user when this is the case. Click **Show more** and scroll down to the **Dependency settings** section to find out exactly which task.



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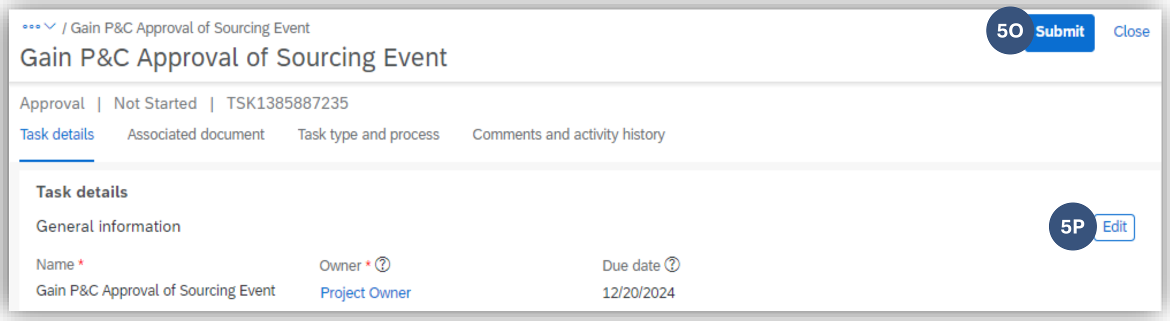
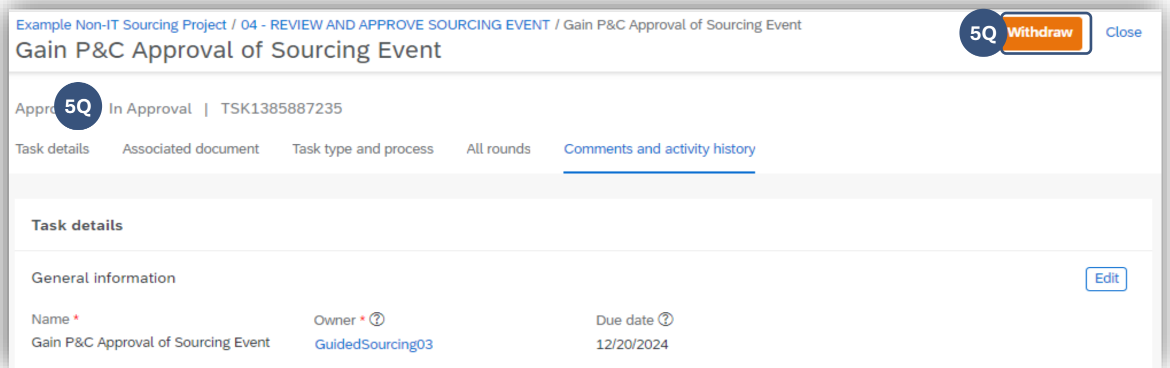
O. Once all preliminary actions have been completed for an **Approval** task, the **Submit** button will appear in the top right. If the **Predecessor** task has not been completed, button will not appear.

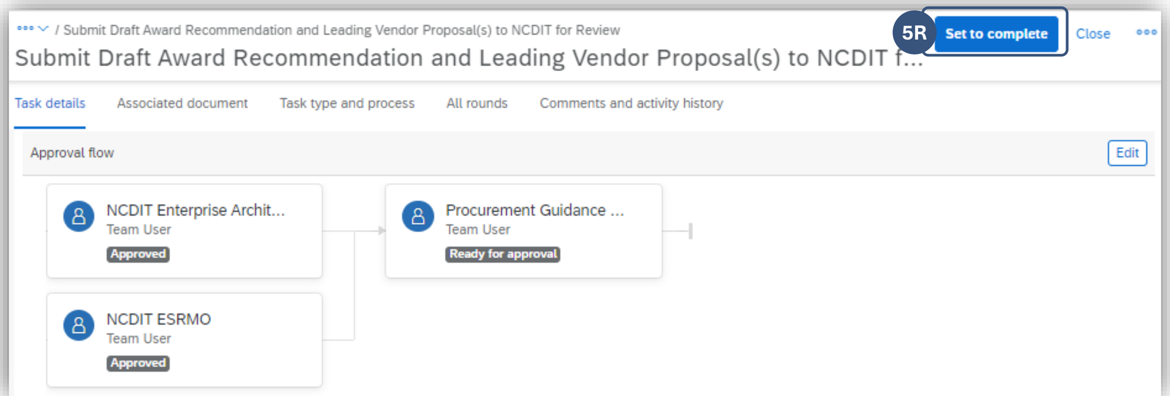
P. If the **Due Date** is not automatically set, click the **Edit** button, select a **Due date** using the date-picker, and click **Save**. Setting a **Due Date** will trigger a **To Do** notification for the approver. Click **Submit** to send the task to the first approver and add a comment if necessary.



Q. The task will flip to an **In Approval** status and relevant columns in the **Task** section will update to reflect that. Details, such as the pre-determined **Approval flow**, can be found by clicking back into the task from the **Task** section. To withdraw a submitted task, click the **Withdraw** button in the top right of a submitted task. The task will automatically flip to an **Approved** status after all approvers have completed their approvals.



R. **Review Tasks** will work similarly to **Approval Tasks**, but the user must manually click the **Set to complete** button to close out the task. It will not automatically flip to **Approved** like an **Approval Task** will. If all reviewers in the **Approval flow** have not completed their review by the requested due date, users may contact those reviewers and ask them to do so at their earliest convenience.



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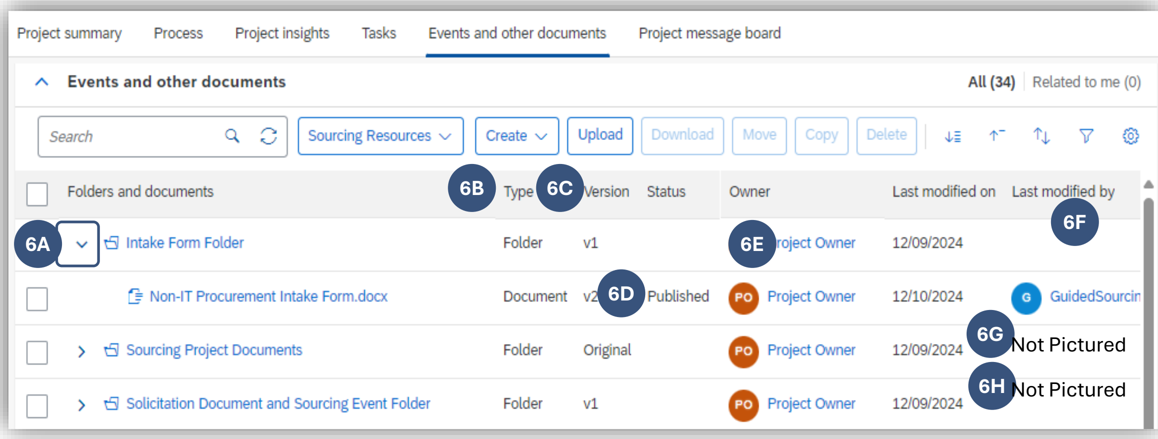
6 The **Events and other documents** section is a central storage location for all documents related to a SP. By default it includes various folders that differ in name and contents between Non-IT and IT solicitations. Many folders are tied to approval or review Tasks and contain pre-loaded document templates that can be downloaded, completed, and replaced for P&C or NCDIT review. Users can upload new documents, and all documents are version controlled. IT solicitations will also have a **Shortcut to the NCDIT Sourcing Library Folder**, where users will go to download the template documents they will use in their IT solicitations.

- **A.** Click on a right arrow next to a folder to display the documents within the folder. There are several default columns in the section. It may be necessary to scroll to the bottom of the section to find horizontal scroll bar to see all of the columns.
- **B.** The **Type** column indicates whether the row **Folder** or **Document**.
- **C.** The **Version** column indicates the current version of the document.
- **D.** The **Status** column indicates whether the document is in **Not Edited**, **Draft**, or **Published.**
- **E.** The **Owner** column indicates who is responsible for the document.
- **F.** The **Last Modified** and **Last Modified by** columns indicate who last updated the document and when.
- **G.** The **Associated tasks** column indicates to which task a document is tied.
- **H.** The **Actions** column gives users a shortcut to **Download** or **Replace** the document.



It may be helpful to widen the view in the **Events and other documents** column to see the entirety of the **Folder** or **Document** name. Move the cursor to the right of the column until a vertical blue line appears, then left-click-and-hold while dragging the line to the right.

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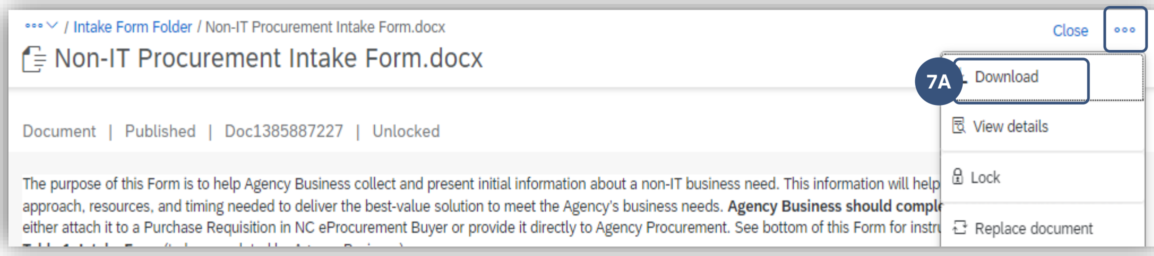
7 For task-related documents in **Non-IT solicitations**, users will generally need to download the provided document templates, fill them out, and replace the template version with the completed version.

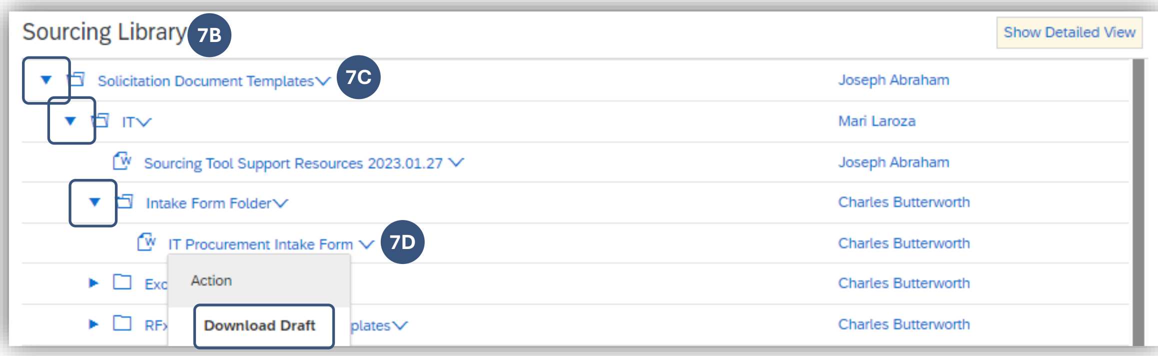
A. To download document templates, either click on the document name and select **Download** from the three-dot dropdown in the top right or click the three dots in the **Actions** column of the **Events and other documents** section to reveal the same dropdown menu.



B. For task-related documents in **IT solicitations**, instead of downloading the template from the specific document folder, users will access the **Sourcing Library**.

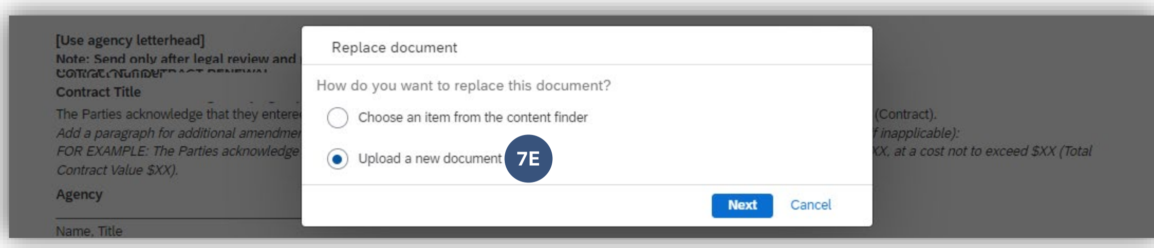
C. From there, open the **Solicitation Document Templates** folder, then the **IT** folder, then the relevant document-type folder.

D. Click on relevant document and select **Download Draft** from the dropdown.



The **Sourcing Library** can be found by clicking **Manage** in the top right of the Ariba home page

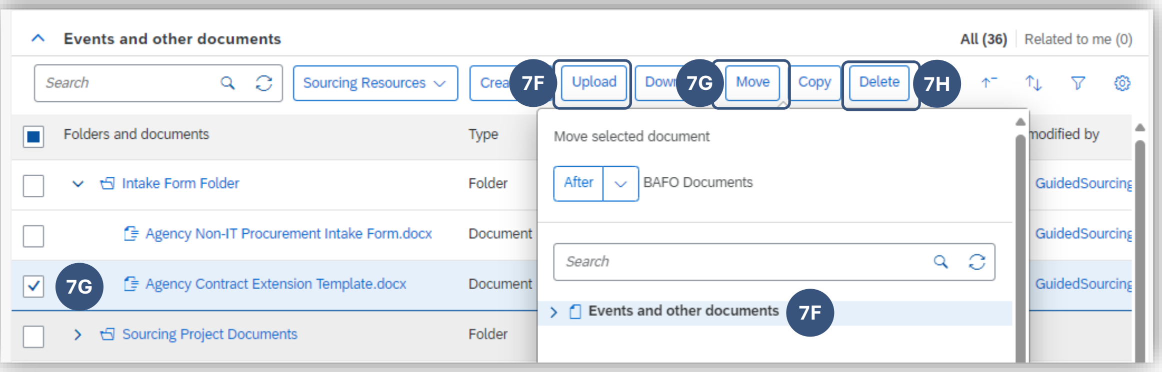
E. When the completed document template is ready to be uploaded to the SP, return to the original template document and select **Replace document** from one of the three-dot dropdowns. Select the **Upload a new document** radio button and click **Next**. Select the document from the computer and select **Yes** to save the document as a new version, then click **Replace**.



F. Any other documents or pertinent files can be added to the **Events and other documents** section should that be necessary. Check the box to the left of the folder into which the document needs to go and click **Upload** in the section above the folders. Select the document to be uploaded.

G. Users can delete documents if necessary but cannot do so for documents existing in any of the template folders (e.g., **Intake Form Folder**). This is to protect against a user accidentally deleting an important sourcing document. For a user to delete a document from one of these folders, they must first move it out of the protected folder. Check the box to the left of the document that needs to be deleted and click **Move** in the section above the folders. On the subsequent pop-up screen, select the bottom folder as the folder to move the document **After**, then click **Move**.

H. Once the document has been moved to the bottom of the **Events and other documents** section outside of a template folder, click the box to its left again and select **Delete** in the section above the folders.



Checking the box next to any document or folder in the **Events and other documents** section will open various action options for each document via the section above the folders, such as **Download** and **Delete**.

Creating a Sourcing Project

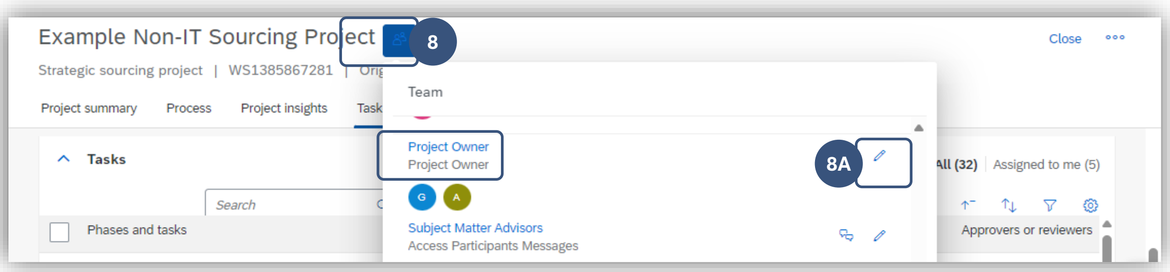
8 The **Team** section lists the project groups and its members. Each project group can have different roles that specify the permissions for the users in that group, the objects the users can access, and the actions they can perform. Each Entity template is set up with the necessary Project Groups, but it is possible to edit the assigned Project Groups within each SP should the need arise. Only users included in a Project Group will be able to view the SP, and only those with a **Project Owner** role will be able to edit the SP. The **Team** section is accessible via the two-person icon to the right of the title. Clicking this icon will open the **Team** section up in a pop-out screen.

A. The second task in for a Non-IT solicitation is to **Confirm Sourcing Team Members and Roles**. To complete this task, pop-out the **Team** section and review the SP groups and their members. For more details on a group, click on the group name to see a list of **Roles** and **Members**. The pre-loaded groups based on the SP template should be sufficient. If changes need to be made, click on the pencil icon to the right of the group name and add or remove users from the **Members** section, then click **Save**. Although it is not an official task, it is advised users do this for IT solicitations as well.

Notes:

- Not all groups will prepopulate with members, although the **Project Owner** group will always default to include the user who created the SP.
- Depending on the delegation level of Non-IT solicitations, a **P&C Approver Team** group that aligns with the agency's P&C Service Group will automatically populate in the **Team** section, making the routing of any Sourcing documentation to P&C a more direct process.
- The **Team** section on IT solicitations will be populated with the applicable NCDIT groups that need to be involved in the approval and review process.

It is encouraged that the main project owner add at least one other user to the **Project Owner** group to serve as a backup with edit access should the main owner be unavailable.



Any changes made to the **Team** section within a SP only apply to that SP. They do not apply to other SPs also created by the same user.

9 The **Project message board** allows members of the SP to communicate with one another. It is an internal message board and is not visible to vendors. Messages do not trigger notifications for other users, so it is not considered extremely useful, however, emails exchanged outside of the SP can be added to the **Project message board** which can be of use.

A. Click the **Post via email** button.

B. A popup box will display with a unique email address for this SP. Copying that email address in the **To:** or **CC:** recipient fields of any future email exchanges or in a reply to an existing email chain will add those messages, along with any attachments, to the **Project message board** with the subject of the email becoming the **Title** of the post.