

NC eProcurement

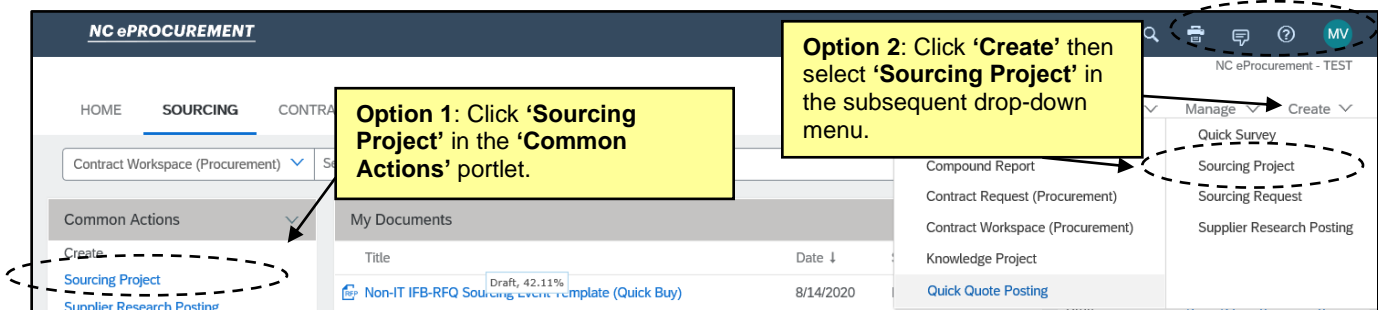
Creating a Sourcing Project

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 **'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 Sourcing Attributes fields, which trigger the appearance of either a **'State of North Carolina Sourcing Process'** template or an **'NCDIT Sourcing Template'** depending on the nature of the solicitation. These templates guide the remainder of the user's steps in the SP creation and management process, based on the P&C or NCDIT prescribed procurement process (e.g., Phases and Tasks).

Please see the ['Non-IT Sourcing Project Quick Guide'](#) or the ['IT Sourcing Project Quick Guide'](#) for concise guidance on creating a **'Sourcing Project'** and publishing and posting its **'Sourcing Event'**, including the processes of gaining P&C or NCDIT's approvals.

I. Initiate Sourcing Project and Enter Attributes

1. There are two options for initiating a SP:
 - a. In the **'Common Actions'** portlet on the left side of the screen, click the **'Sourcing Project'** link under the **'Create'** header.
 - b. In the upper right corner of the screen, click the **'Create'** and select **'Sourcing Project'** in the subsequent drop-down menu.



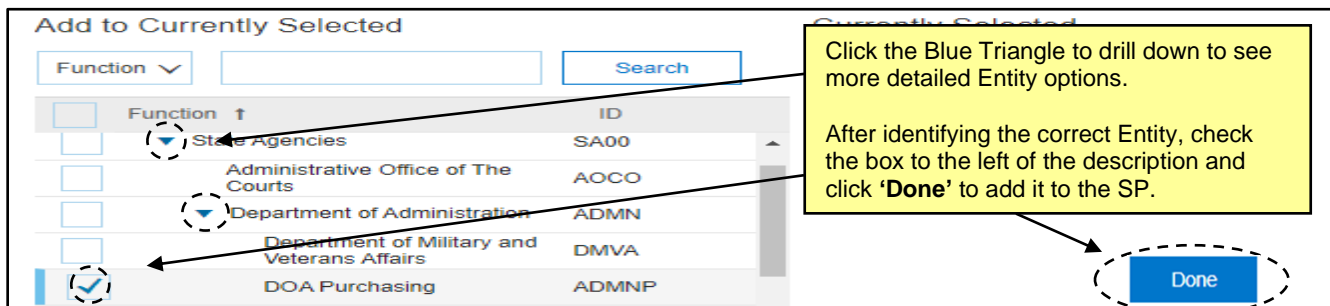
2. The **'Create Sourcing Project'** page will display. Populate all relevant fields, including the up-to ten required fields, as noted by an asterisk (*). Some fields are conditional and information entered in this portion of the SP determine later options, including the selection of the **'Solicitation Document'**.

Note: There is an informational tool-tip icon (lowercase 'i' 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. **Name***: Enter a title for the SP. Vendors will not see this field. We recommend including 'Project' at the end of the Name to help differentiate the SP from the Sourcing Event within the SP.
4. **Description***: Describe the SP being created. This is a required field even though there is no red asterisk.
5. **Copy from Project**: This field defaults to '(no value)', but a user may initiate the process of copying a previously-created SP from this drop-down field.
6. **Project State**: This field defaults to 'Active', but in the future can be updated to 'Completed', 'Cancelled', or 'On Hold'.
7. **Entity***: Select the Entity that will be issuing the Sourcing Event within the SP. Click the down-arrow at the right of the box and select 'Search more' in the drop-down menu to access the Entity Search page. Users may search by 'Name' or 'ID'. For some Entities with multiple levels, it will be necessary to drill down further by clicking on the Blue Triangle next to the Entity's name. Once the correct Entity has been identified, check the box next to it and click 'Done' to add it to the SP.



8. **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.
9. **Estimated Base Contract Value***: This is a money field that is an estimated value of the contract over its base lifetime, excluding possible extensions.
10. **Solicitation Vehicle***: This field defaults to 'No Choice'. The Project Owner should select one of the following options based on the nature of their solicitation:
 - Non-IT: Solicitation
 - IT: RFP
 - IT: IFB
 - IT: RFQ
 - IT: SOW
 - IT: RFI
 - IT: Exception Request Only

Note: 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.

11. **Execution Strategy***: This field will have two options, '**Full Sourcing**' and '**Lite Sourcing**'. Users should only select '**Lite Sourcing**'.
12. **Approval Scenario***: This field defaults to '**No Choice**'. The Project Owner will need to select an option between '**Goods**', '**Services**', and '**Consultant Services**' based on the nature of the solicitation.

Note: Selecting '**Consultant Services**' will add an extra Task and document to the '**Solicitation Document**' folder for review by P&C during the approval process.
13. **Special Circumstances**: This field defaults to '**(no value)**'. If there are special circumstances with regards to the solicitation, the Project Owner can select from the below options. Please see the [Procurement Exceptions \(Non-IT\) Job Aid](#) for further guidance.
 - **Procurement Exception – Brand Specific Request**
 - **Procurement Exception – Extended Contract Term**
 - **Procurement Exception – Waiver of Competition**
 - **Special Delegation**
14. **Predecessor Project**: This field defaults to '**(no value)**', but a user may link the current SP to a previously completed SP from this drop-down field.
15. **Owner**: The user or group 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**' tab after the '**Create**' button is clicked.
16. **Currency**: This field defaults to '**US Dollar**' and should be left as is.
17. **Commodity***: Select the Commodity Code that best describes the nature of the sourced item(s). Click the down-arrow at the right of the box and select '**Search more**' in the drop-down menu to access the Commodity Code Search page. Users may search by '**Name**' or '**ID**'. After identifying the correct code, check the box next to it and click '**Done**' to add it to the SP. More than one Commodity Code can be selected per SP if the solicitation covers multiple items.

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). To search for more specific Commodity
- Codes in the search results, click on the **Blue Triangle** next to the Commodity Code description.
- The NC eProcurement guide to selecting commodity codes can be found here: <https://eprocurement.nc.gov/training/selecting-commodity-codes>.
- The UNSPSC code search website can also be a helpful resource: <https://www.unspsc.org/search-code>.

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Choose Values for Commodity

Add to Currently Selected

Name Search

Name	ID
Agricultural machinery for cleaning and sorting and grading	211020
Cleaning Equipment and Supplies	47
Decontamination aids and safety cleaning equipment	451824
Industrial Cleaning Services	76
Cleaning and janitorial services	7611
Building component cleaning services	761116
General building and office cleaning and maintenance services	761115
Transport vehicle cleaning	761118
Decontamination services	7610

Done

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

19. **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.

Create Sourcing Project

Name: * ⓘ

Description: ⓘ

Copy from Project: (no value) ▾

Project: Full Project ⓘ

Project State: Active ▾ ⓘ

Origin: Ariba Sourcing ⓘ

Entity: * (no value) ▾

Est. Total Contract Value (incl. Renewals): * USD ⓘ

Estimated Base Contract Value: * USD ⓘ

Solicitation Vehicle: * Non-IT: Solicitation ▾

Execution Strategy: * No Choice ▾ ⓘ

Approval Scenario: * No Choice ▾ ⓘ

Special Circumstances: (no value) ▾ ⓘ

Predecessor Project: (no value) ▾ ⓘ

Commodity: * (no value) ▾

Contract Months: ⓘ

Target Contract Award Date: * ⓘ

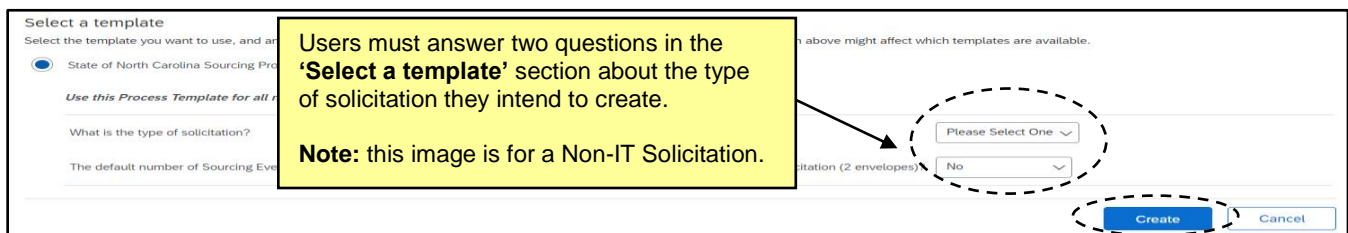
II. Template Selection

After filling out the Sourcing Project Attributes fields, the user should navigate down the screen to the **'Select a template'** section. Based on the selection made in the **'Solicitation Vehicle'** field above, the radio button next to either the **'State of North Carolina Sourcing Process'** template or the **'NCDIT Sourcing Template'** will be populated and the user will be required to answer two questions.

- In the **'Select a template'** section of the **'Create Sourcing Project'** page, note the radio button next to either the **'State of North Carolina Sourcing Process'** template or the **'NCDIT Sourcing Template'**. Users will be prompted to answer two questions:
 - The first question for Non-IT solicitations is **"What is the type of solicitation?"**. The choices are **'IFB'** or **'RFP'**. 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.
 - The first question for IT solicitations is **"Is this an IT Project as determined by the NCDIT EPMO?"**. Agencies should work with their assigned NCDIT EPMO Project Management Advisor to help determine if IT business need is deemed an IT Project that is required to follow the NCDIT IT Project Management Process.

Note: No questions will be asked if the user selects **'IT: Exception Request Only'** in the **'Solicitation Vehicle'** field.

 - The second question for all solicitations is **"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.



- When all fields have been completed, the template has been selected, and the 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.

Note: 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'**.

III. Overview of Tabs

After clicking **'Create'** on the **Sourcing Attributes** page, the SP is saved and the **Overview Tab** is displayed. This screen contains information about the SP captured on the previous **Sourcing Attributes** page. From this screen, users can access six other tabs for the management of the SP: **'Documents'**, **'Tasks'**, **'Team'**, **'Message Board'**, **'Event Messages'**, and **'History'**. At this point, the **'Project State'** is **'Draft'**.

- Documents Tab:** The place to manage all SP related documents. The most important document in the SP is the **'Sourcing Event'** document. Several other helpful document templates or a link to the **'NCDIT Sourcing Library Folder'** are pre-populated within this tab.
- Tasks Tab:** A leading practices checklist of the procurement process as suggested by P&C or NCDIT. Some tasks, usually beginning with "Gain P&C/NCDIT Approval", require interaction with P&C or NCDIT.
- Team Tab:** Contains a list of individuals and groups considered as **'Team Members'** who can take various roles in the SP throughout its lifecycle. Only users present on this tab can see the SP.

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- **Message Board Tab:** An online discussion page where team members can hold conversations in the form of posted messages organized in topics.
 - **Event Messages Tab:** This tab is read-only on the SP and is imported from the Sourcing Event. This is where users and vendors will communicate within the Sourcing Event.
 - **History Tab:** A detailed record of all changes to information in the SP over time.
1. On the **'Overview'** tab, scroll down the screen to verify the accuracy of the information populated in the previous **'Create Sourcing Project'** page. The **'Overview'** contains basic information such as **'Sourcing Project ID'**, **'Entity'**, and **'Description'**.
 2. To edit any of this information, click on **'Actions'** at the top of the page and select **'Edit Overview'**.

Note: To edit the answer to either of the template questions, click onto the **'Template Questions'** tab at the top of the subsequent **'Edit Sourcing Project'** screen.

The screenshot shows the 'Test Sourcing Project' Overview page. Callouts include:

- 'Access to additional tabs' pointing to the top navigation bar.
- 'To edit section information, click on 'Actions' and select 'Edit Overview.''
- 'The 'Overview' tab is displayed once the SP is created. It is populated with information entered in the previous 'Create Sourcing Project' section.'

IV. Managing Phases and Tasks

Phases and Tasks are located under the **'Tasks'** tab. 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 with subsequent Tasks under each phase, and these will differ between Non-IT and IT solicitations. There are several types of **'Tasks'** in a SP:

- To Do Task:** A simple task that tracks an action.
- Document Task:** Associated with a particular document or folder.
- Review Task:** Designed to route a document to others for review, and reviewers can usually edit and suggest changes.
- Approval Task:** Requests approvers to approve or deny a document before it is finalized.
- Notification Task:** Sends email reminders to users.

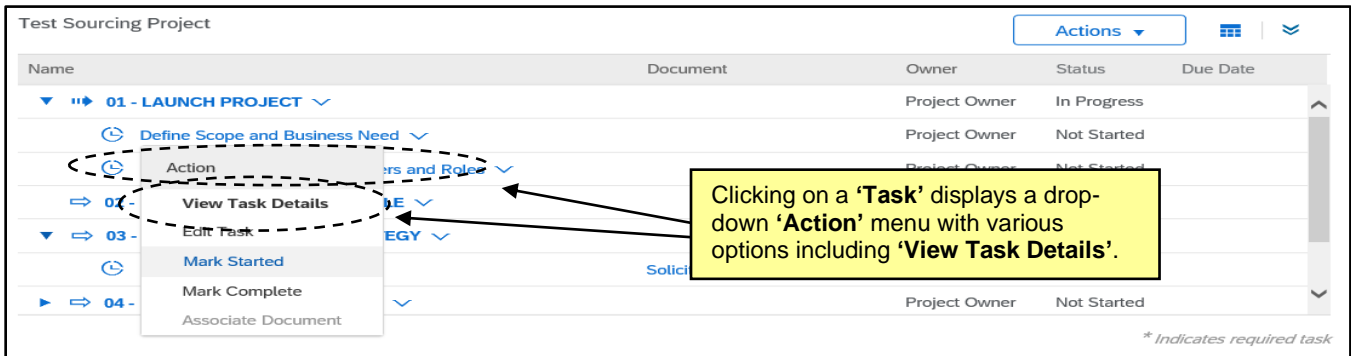
The screenshot shows the 'Test Sourcing Project' Tasks tab. Callouts include:

- 'Phases' pointing to the phase headers (e.g., 01 - LAUNCH PROJECT).
- 'Tasks' pointing to the task items within a phase.
- 'Documents' (if present) associated with 'Tasks', along with the 'Owner', 'Status', and 'Due Date' (if set) are listed to the right of each 'Task'.

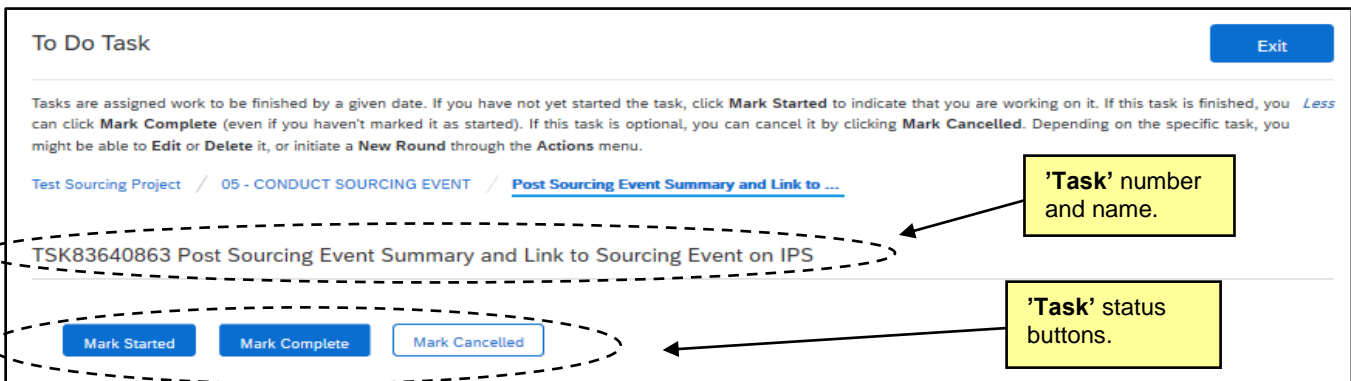
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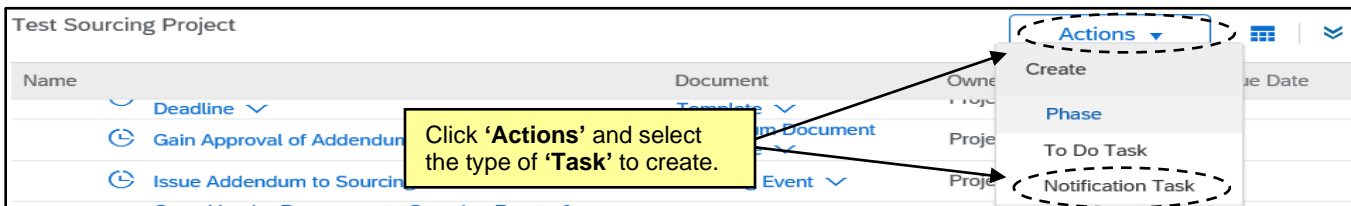
1. Click on a **'Task'** to display the **'Action'** menu for that **'Task'** and select **'View Task Details'**.



2. The **'Task'** detail page opens and displays the **'Task'** number and name above a description of the user's expected action. Click **'Mark Started'** to indicate the **'Task'** has been initiated and **'Mark Complete'** once the activity has been completed. If the **'Task'** is not a **'To Do Task'**, the **'Mark Started'** button will not appear on the detail page but can be selected from the **'Action'** drop-down. **'Mark Started'** will change the **'Status'** to **'In Progress'**. **'Mark Complete'** will change the **'Status'** to **'Complete'** and put a blue checkmark next to that **'Task'** on the **'Tasks Tab'**. This helps SP stakeholders know where the process stands.



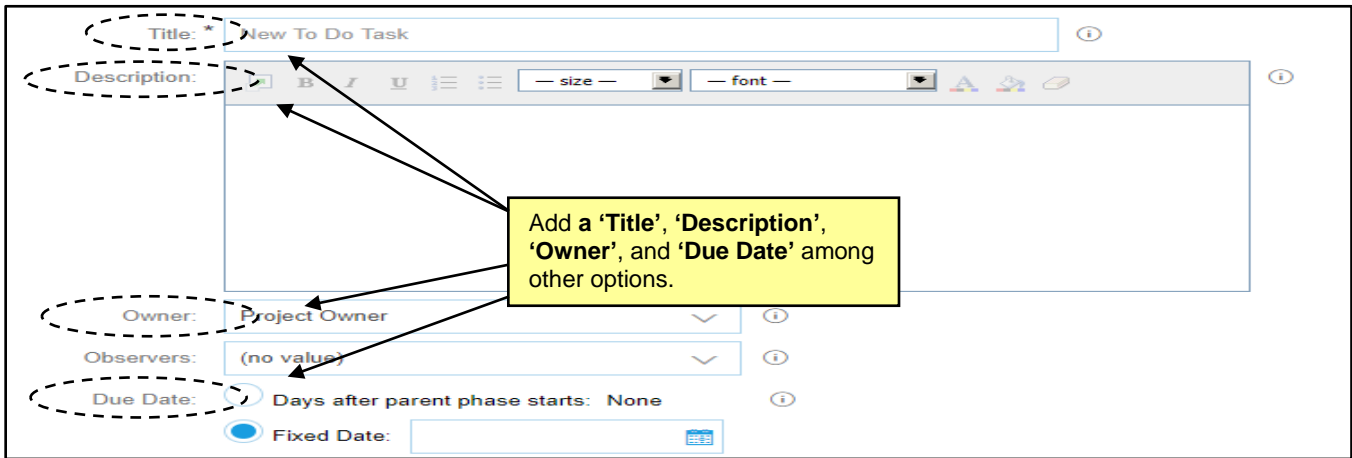
3. To create a new ad hoc **'To Do Task'** or **'Notification Task'**, click **'Actions'** above the **'Task'** list and select the desired **'Task'** type from the drop-down menu.



4. On the **'New Task'** page, users can set values for fields including **'Title'**, **'Description'**, **'Owner'**, and a **'Due Date'**. We strongly recommend including a **'Due Date'** (e.g., five or more business days out) so the **'Task'** will show up in the new owner's **'To Do'** portlet. When the details have been completed, click **'OK'** to send the **'Task'** to its new owner. The new owner will receive an email notification alerting them to their new **'Task'**.

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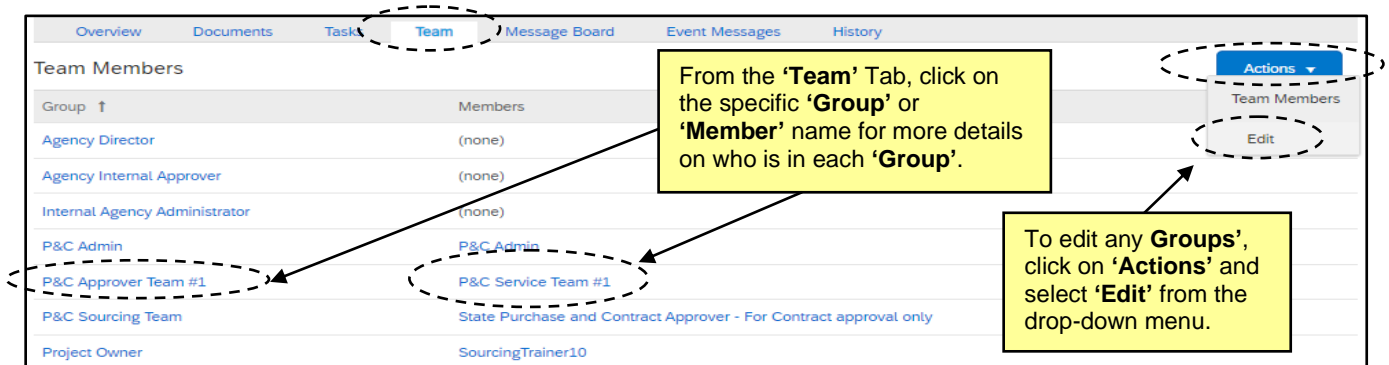
V. Managing Team Members

The **'Team'** tab 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.

1. The second **'Task'** in the first phase of a Non-IT solicitation is to **'Confirm Sourcing Team Members and Roles'**. To complete this **'Task'**, navigate to the **'Team'** Tab and review the SP **'Groups'** and their **'Members'**. For more details on these, click on them to open a **'Details'** page. The pre-loaded **'Groups'** based on the SP template should be sufficient. If changes need to be made, click on **'Actions'** and select **'Edit'** from the drop-down menu. 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'** will always default to include the user who created the SP. Only users in this group have the ability to edit 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 on the **'Team'** Tab, making the routing of any Sourcing documentation to P&C a more direct process.
- The **'Team'** Tab on IT solicitations will be populated with the applicable NCDIT groups that need to be involved in the approval and review process.



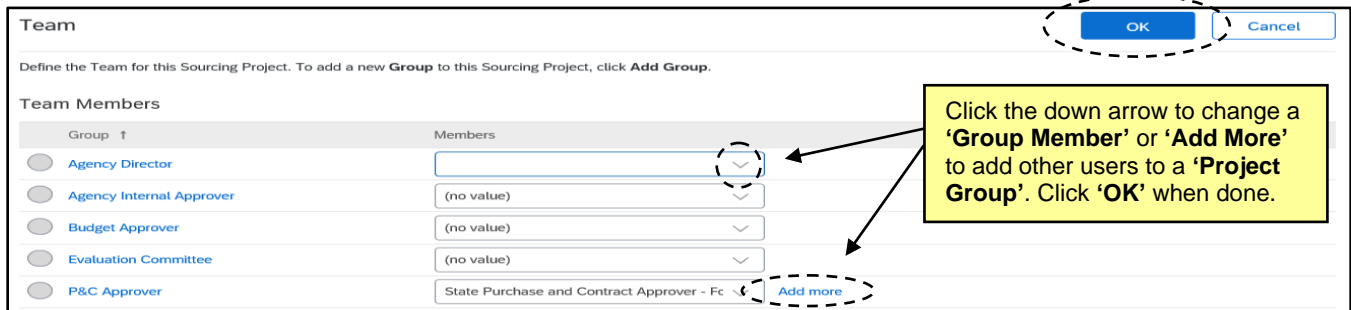
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- On the **'Team'** page, change a team member by clicking on the down arrow in the **'Members'** box or click on **'Add more'** to include other users. There is also an **'Add Group'** button that will allow for additional **'Groups'** to be added. When all changes have been made, click **'OK'**.

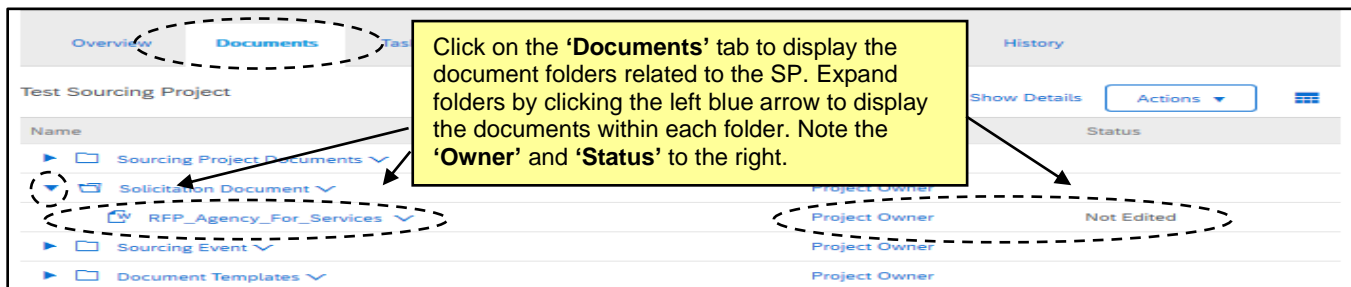
Note: Any changes made to the **'Team'** tab within a SP only apply to that SP. They do not apply to other SPs also created by the same user.



VI. Managing Documents

The **'Documents'** tab 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 NCDIT Sourcing Library Folder'**, where users will go to download the template documents they will use in their IT solicitations.

- Folders can be expanded by clicking the blue triangle to the left of the folder name. This will display any documents contained in the folder. The document's **'Owner'** and **'Status'** are listed to the right of each.



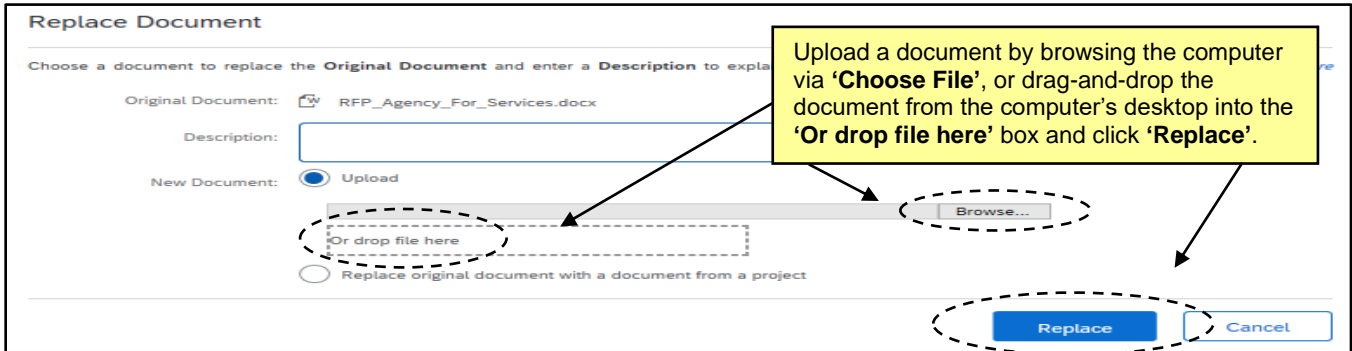
- For task-related documents in **Non-IT solicitations**, users will generally need to download the provided document templates, fill them out, and replace the template version with the completed version. To do this, click the down-arrow to the right of the document template and select **'Download'** in the drop-down menu, then make the appropriate changes to the downloaded copy. When the document is finalized, click the drop-down arrow to the right of that template and this time select **'Replace Document'** to upload the new version. This process works for making edits to any document in the SP.

For task-related documents in **IT solicitations**, instead of downloading the template from the specific document folder, users will click the **'Shortcut to NCDIT Sourcing Library Folder'** link at the top of the **'Documents'** tab and select **'Open'** from the dropdown. On the subsequent **'Sourcing Library'** page, open the folder of the document type needed and download the template from this location. When the final version has been completed, return to the SP **'Documents'** tab and select **'Replace Document'** from the **'Replace with...'** template dropdown in that specific document folder.

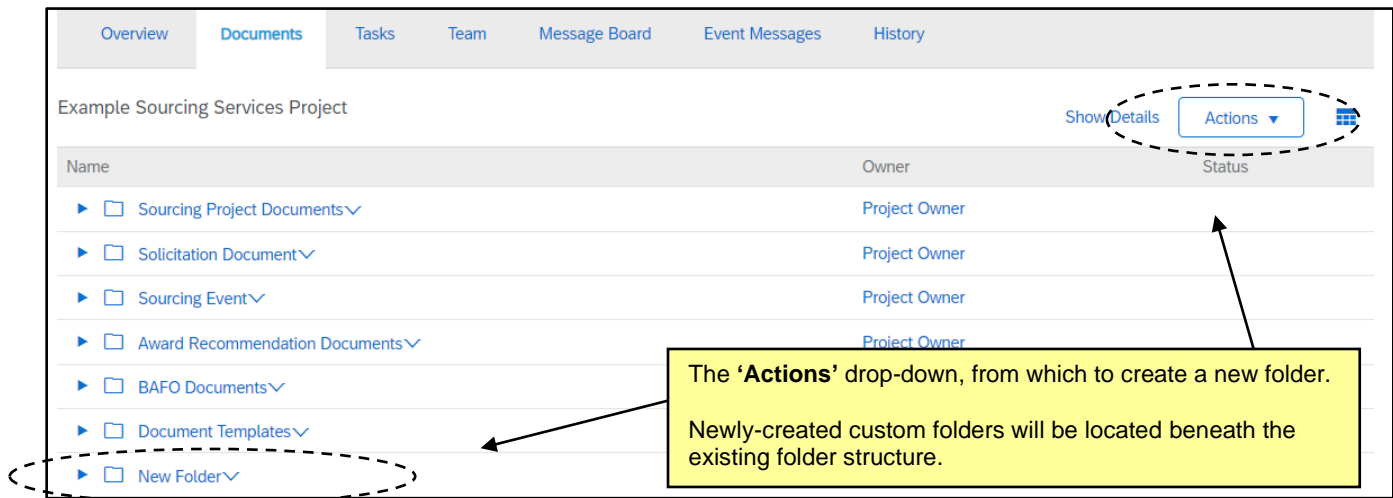
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- On the **'Replace Document'** page, click **'Choose File'** to browse through the computer to select the file to upload or drag-and-drop the file from the computer's desktop to the **'Or drop file here'** box. Click **'Replace'** to finish uploading the file. On the subsequent screen, select the radio button for **'Replace document by uploaded file'** before clicking **'OK'**. Finally, click **'Save'** on the last screen.



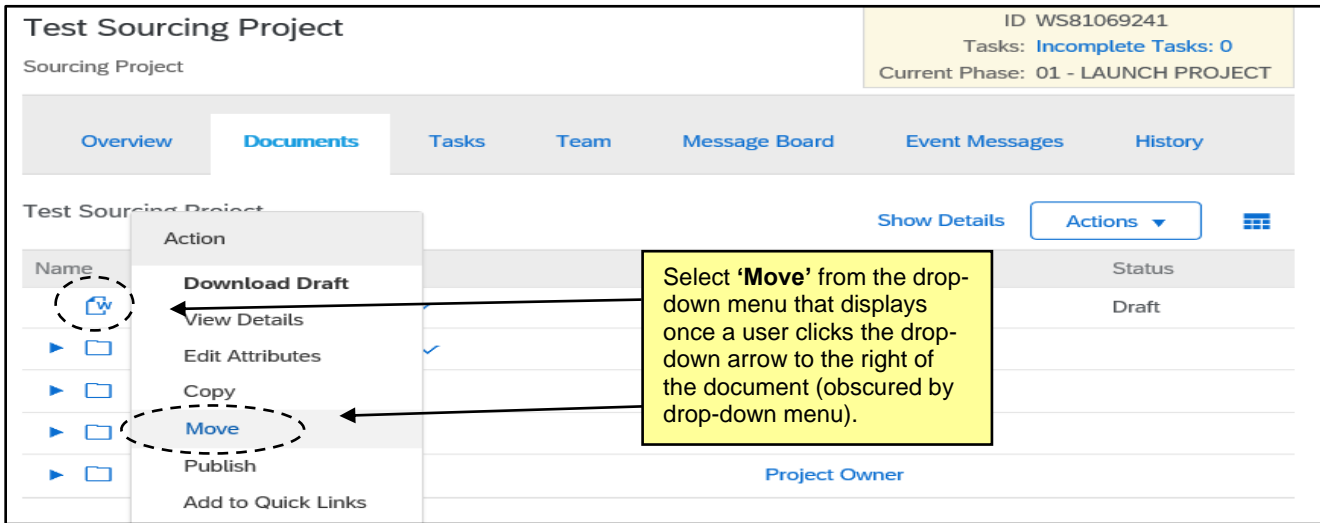
- Any other documents or pertinent files can be added to the **'Documents'** tab should that be necessary. Users can customize this tab by adding their own folders. **'Click'** the **'Actions'** drop-down in the top-right of the **'Documents'** tab and select **'Folder'** from the menu beneath **'Create'**.
- On the **'Create New Folder'** screen, give the folder a name and click **'Create'**. The new folder will display at the bottom of the folder structure. Users can create as many customized folders as necessary, and documents within these folders can be managed just as documents within template folders.



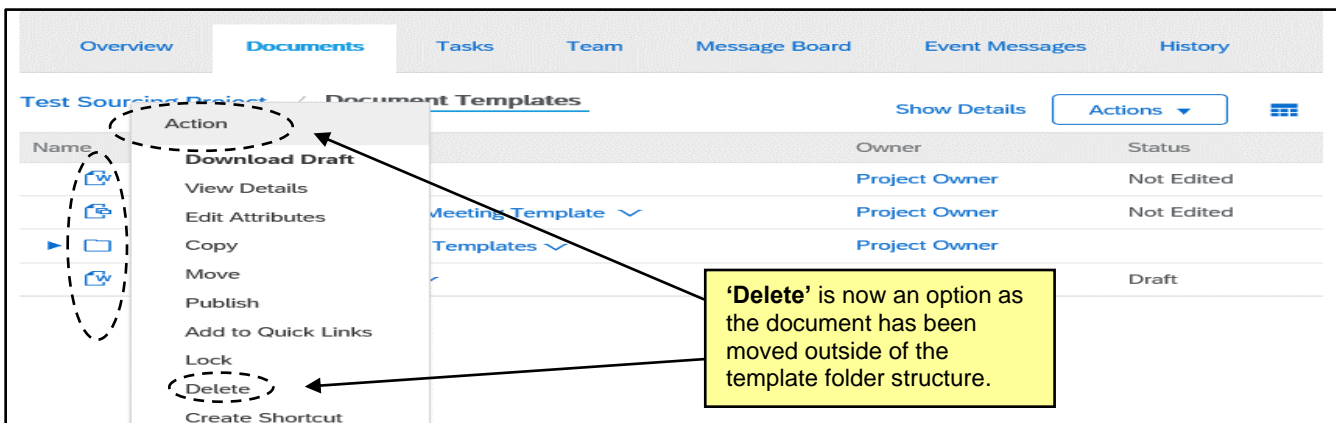
- Users can delete documents if necessary, but cannot do so for documents existing in any of the template folders (e.g., **'Solicitation Document'** or **'Sourcing Event'**). This is to protect against a user accidentally deleting an important sourcing document. For a user to delete a document in one of these folders, they must first move it out of the protected folder.
- Click the drop-down arrow to the right of the document to be deleted and select **'Move'** from the drop-down menu beneath **'Action'**.

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8. Select the radio button next to any destination folder that is not a default template folder and click 'OK', and the document will be moved there. Now when the user clicks the drop-down arrow to the right of that document, an option for 'Delete' will be visible for selection.



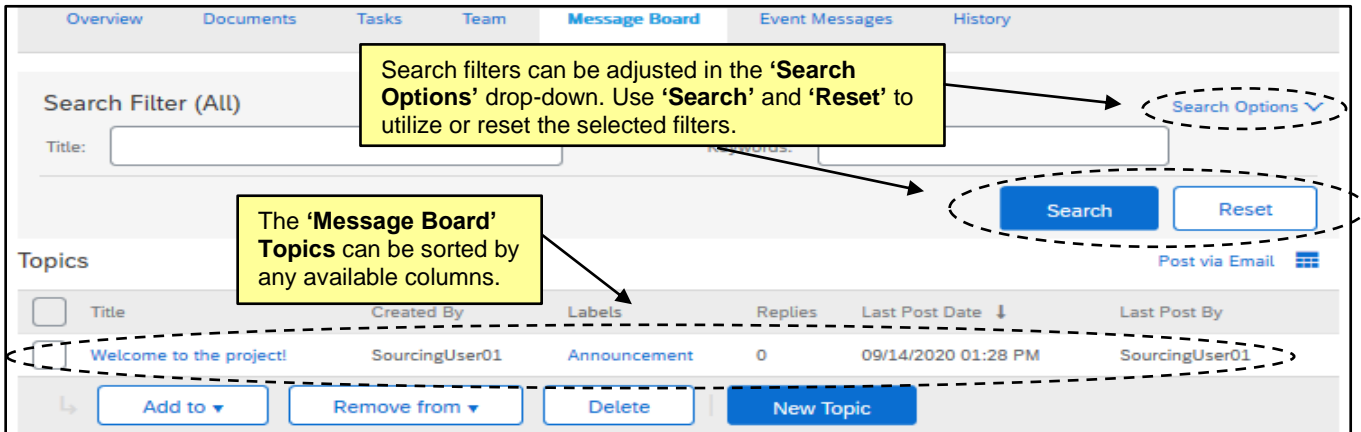
VII. Using the Message Board

The **'Message Board'** allows members of the SP to communicate with one another. The **'Message Board'** is used internally and is not visible to vendors, while **'Event Messages'** (read-only within the SP) are for communication with the vendors responding to the Sourcing Event.

1. Click on the **'Message Board'** tab at the top of the page.
2. Scroll down to see all **'Topics'** for the SP.
 - a. Messages can be sorted by their fields: **Title, Created By, Labels, Replies, Last Post Date, and Last Post By.**
3. Use the **Search Filter** at the top of the tab to search by **'Title'** or **'Keywords'** to find specific messages.
 - a. Additional search fields can be added to the **Search Filter** section using the **'Search Options'** drop-down menu on the right side. Search options can be shown or hidden from this drop-down.

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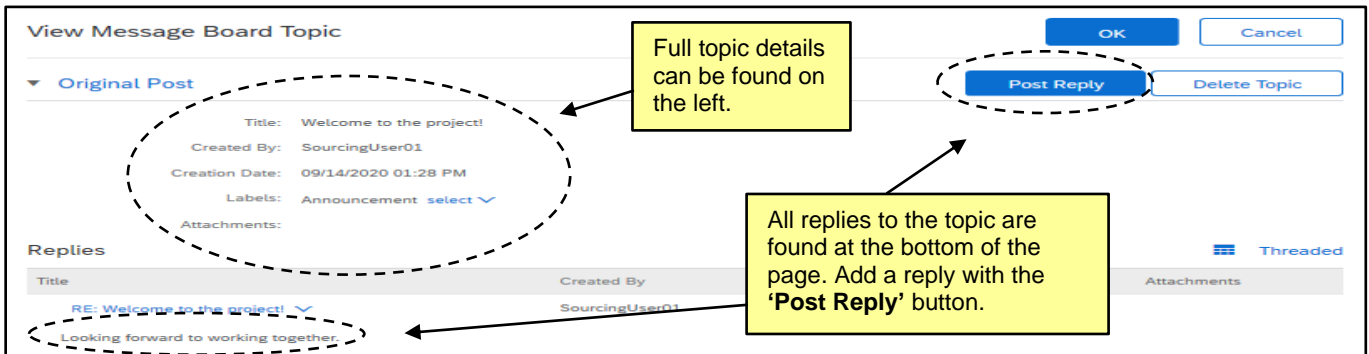
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4. To see the contents of a message and any posted replies, click the 'Title' of the message.



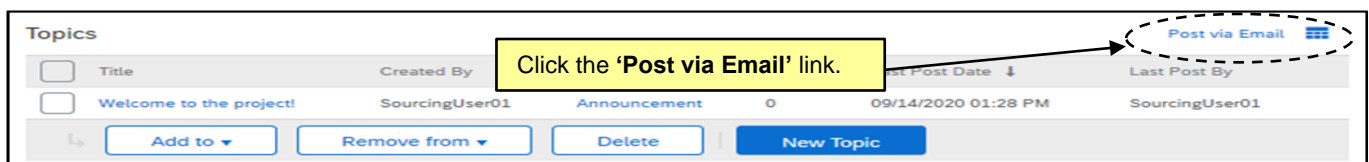
- From this screen, all listed replies and attachments will appear.
- Click 'OK' when finished reviewing the message, or 'Cancel' to exit without saving changes.
- The 'Post Reply' button can be used to post a reply to the Topic.
- If the user created the Topic, the 'Delete Topic' button will appear in the upper right, allowing the user to remove the Topic from the SP.



VIII. Tracking Emails in the Message Board

Emails exchanged outside of the SP can also be added to the Message Board.

- Click the 'Post via Email' link beneath the 'Search' button.



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2. A popup box will display with a unique email address for this SP. Copying that email address in any future email exchanges or in a reply to an existing email chain will add those messages, along with any attachments, to the **Message Board** with the subject of the email becoming the **'Title'** of the **'Topic'**.

Post via Email

The email address below is unique to this workspace and can be used to post a topic or reply to email attachments. Internal users as well as any external parties can post through email, as long as they use the email address below.

@ansmp.ariba.com

Copy the email address displayed in the on the left side of the pop-up box to an email exchange, and those emails will automatically be added to the **'Message Board'**.

IX. Event Messages

The **'Event Message'** tab is created for members of the SP to communicate with vendors that are responding to the Sourcing Event. Vendors can submit questions using **'Event Messages'**. Within the SP, this tab is read-only. For more details, please see the Managing a Sourcing Event job aid.

1. Click on the **'Event Messages'** tab and scroll down to see all the **'Messages'** for the Sourcing Event.
 - a. Messages can be sorted by their fields: **Event, From, Contact Name, Subject, ID, Reply Sent, Sent Date, and To.**
 - b. These fields can be customized by clicking the **'Table Options Menu'** to the right of the Message title. Then the user can check and uncheck the desired fields.
2. Use the **Filter By** section in the top left to search by **'Unread', 'Unreplied', 'Recent', or 'All'** to narrow down the listed Messages.

Test Sourcing Project ID WS81069241
Tasks: **Incomplete Tasks: 0**

Sourcing Project

Overview Documents Tasks Team Message Board **Event Messages** History

Messages

Event ↑	From	Contact Name	Subject	Id	Reply Sent	Show / Hide Columns
Sourcing Event/Sourcing Event Test	NC Test Vendor	State Supplier		90	No	<input checked="" type="checkbox"/> Event <input checked="" type="checkbox"/> From <input checked="" type="checkbox"/> Contact Name <input checked="" type="checkbox"/> Subject <input checked="" type="checkbox"/> Id <input checked="" type="checkbox"/> Reply Sent <input checked="" type="checkbox"/> Sent Date <input checked="" type="checkbox"/> To
Sourcing Event/Sourcing Event Test	NC eProcurement - TEST	SourcingUser01		45	Not Applicable	
Sourcing Event/Sourcing Event Test	NC eProcurement - TEST	SourcingUser01		44	Not Applicable	

The available fields can be adjusted by checking or unchecking the field in the dropdown box.