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 <u>'Non-IT Sourcing Project Quick Guide'</u> or the <u>'IT Sourcing Project Quick Guide'</u> 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.

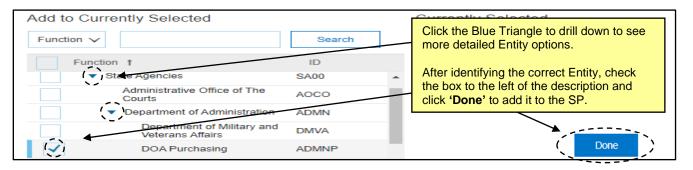
<u>NC ePROCUREMENT</u>			select 'S	2: Click 'Create' then ourcing Project' in	Q 🖶 🗊 🕐 🙌
HOME SOURCING CONTRA Contract Workspace (Procurement) V S	Option 1: Click 'Sourcing Project' in the 'Common Actions' portlet.	in the 'Common		equent drop-down	✓ Manage ✓ Create ✓ Quick Survey Sourcing Project
Common Actions	My Documents	J		Contract Request (Procurement) Contract Workspace (Procurement)	Sourcing Request Supplier Research Posting
Create	Title		Date ↓	Knowledge Project	
Sourcing Project Supplier Research Posting	Non-IT IFB-RFQ Sources event remplate (Quick Buy)		8/14/2020	Quick Quote Posting	

 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.

Create Sourcing Proje	ect		Create Cancel
To create a Sourcing Project, spe	cify the fields below. Templates used for constructing your So	ourcing Project appear in the section at th	he bottom of the page, and available Templates More
Name: *	Untitled Sourcing Project		Encircled 'i's indicate
Description:			informational tool-tips.
Copy from Project:	(no value)		
Project:	Full Project (i)	sterisks indicate required	fields.
Project State:	Active 🗸 🛈		
	Origin: Ariba Sourcing (i)	Owner:	classroomtraining53 v (i)
	Entify * [(no value) ~	Currency:	US Dollar 🗸

- 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, <u>excluding</u> 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.

- 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: <u>https://eprocurement.nc.gov/training/selecting-commodity-codes</u>.
- The UNSPSC code search website can also be a helpful resource: <u>https://www.unspsc.org/search-code</u>.

	nter search terms	Click the Blue Triangle	to drill down to see
Name V (cleaning Search		more detailed Commodi	
Name t	ID	results.	
Agricultural machinery for cleaning and sorting and grading	211020		
 Cleaning Equipment and Supplies 	47	After identifying the corr	
Decontamination aids and safety cleaning equipment	461824	Commodity Code(s), ch	
 Industric Oreaning Services 	76	left of the description an	nd then click 'Done'
 Cleaning and janitorial services 	7611	to add it to the SP.	
Building component cleaning services	761116		
General building and office cleaning and maintenance services	761115		
Transport vehicle cleaning	761118	(Done
 Decontamination services 	7610		

- 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	ct	Create Cancel	
To create a Sourcing Project, spec	ify the fields below. Templates used for constructing your Sourcing Proje	roject appear in the section at the bottom of the page, and available Templates may Mo	ore
Name: *	Untitled Sourcing Project	()	
Description:		Û	
Copy from Project:	(no value)		
Project:	Full Project (j)		٦
Project State:	Active V	Three fields, 'Execution Strategy', 'Approval Scenario', and 'Special Circumstances'	
	Origin: Ariba Sourcing (i)	only appear when 'Non-IT: Solicitation' is the	Ð
	Entity: * (no value)	selection in the 'Solicitation Vehicle' field.	
Est. Total Contract Value (incl. Ren	newals): * USD (j)	Compredity: * (no value)	-
Estimated Base Contrac	t Value: * USD (i)	Contract Months: (i)	
Solicitation	Vehicle: * Non-IT: Solicitation	Target Contract Award Date: *	
Execution S	irategy: * No Choice 🗸 (i)		
Approval Se	cenario: * No Choice V (i)		
Special Circums	stances: (no value) 🗸 🤅		
Predecessor	Project: (no value) V (i)		

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 <u>'Multi-Envelope Events'</u> Job Aid for further guidance.

Select a template Select the template you want to use, and an	Users must answer two questions in the	h above might affect which templates are available.
State of North Carolina Sourcing Pro	'Select a template' section about the type	
Use this Process Template for all r	of solicitation they intend to create.	
What is the type of solicitation?		Please Select One 🗸
The default number of Sourcing Eve	Note: this image is for a Non-IT Solicitation.	station (2 envelopes) No
		Create
		Create

2. 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.

- **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.
- 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'.

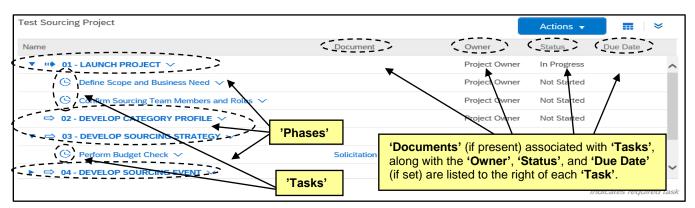
Note: To edit the answer to either of the template questions, click onto the **'Template Questions'** tab at the top of the subsequent **'Edit Sourcing Project'** screen.

Test Sourcing Project		Access t	to additional tab	s	ID WS83640822 Tasks: Incomplete Tasks: 0 Current Phase: 01 - LAUNCH PROJECT
Overview Documents	Tasks Team	Message Board	Event Messages	Hist	To edit section information, click on ' Actions ' and select ' Edit Overview. '
ID:	W\$89540822 (i)	View Details	AUNCH F	The 'Ov	erview' tab is displayed once
Project State:	Active (i)	Move)EVELOP		s created. It is populated with
Version:	Original		EVELOP		ion entered in the previous
Project Status:	Gray	Create	SONDUCT		
Start Date:	09/14/2020 (i)	Copy Project	IEGOTIA	Create	Souring Project' section.
Due Date:	(i)	Follow-on Project	L		

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:

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



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

Test Sourcing F	Project				Actions 🔻		*
Name			Document	Owner	Status	Due Date	
▼ 110 01 - L	AUNCH PROJECT \sim			Project Owner	In Progress		^
G D	efine Scope and Business N	leed 🗸		Project Owner	Not Started		
< 🕒	Action	ers and Roles \checkmark		Broject Oumor	Not Started		
⇒ oz -	View Task Details	he 🗸		ng on a ' Task ' displays			
▼ 🔿 03 -	Edit Task	EGY 🗸		'Action' menu with vari			
G	Mark Started		Solici	is including 'View Task	Details .		
▶ 🖙 04-	Mark Complete	\sim		Project Owner	Not Started		\sim
	Associate Document				*/	ndicates requi	red task

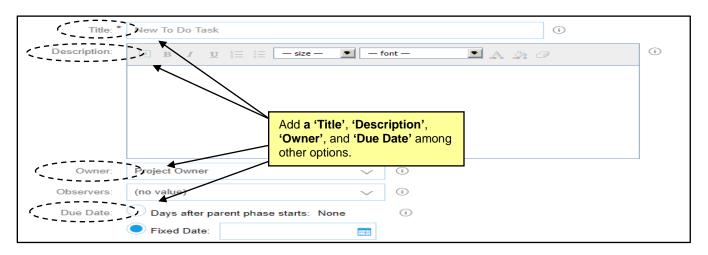
2. The 'Task' detail page opens and displays the 'Task' number and name above a description of the user's expected action. Click 'Mark Started' to indicate the 'Task' has been initiated and 'Mark Complete' once the activity has been completed. If the 'Task' is not a 'To Do Task', the 'Mark Started' button 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 'In Progress'. 'Mark Complete' will change the 'Status' to that 'Task' on the 'Tasks Tab'. This helps SP stakeholders know where the process stands.

To Do Task	Exit
Tasks are assigned work to be finished by a given date. If you have not yet started the task, click Mark Started to indicate that you are can click Mark Complete (even if you haven't marked it as started). If this task is optional, you can cancel it by clicking Mark Cance might be able to Edit or Delete it, or initiate a New Round through the Actions menu.	-
Test Sourcing Project / 05 - CONDUCT SOURCING EVENT / Post Sourcing Event Summary and Link to	' Task ' number and name.
TSK83640863 Post Sourcing Event Summary and Link to Sourcing Event on IPS	'Task' status

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.

Test So	urcing Project		X	Actions -	m ×
Name		Document	Owne	Create	.e Date
	\checkmark Deadline \checkmark	Templete 🗸	- TOJC	Phase	
	Gain Approval of Addendum		ocument Proje	To Do Task	
	Issue Addendum to Sourcin	the type of 'Task' to create.	nt 🗸 Proje	Notification Task	

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'.



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.

 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.



 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.

Team		OK Cancel
Define the Team for this Sourcing Project. To add a new Grou	p to this Sourcing Project, click Add Group.	
Team Members		Click the down arrow to change a
Group 1	Members	'Group Member' or 'Add More'
Agency Director		to add other users to a 'Project
Agency Internal Approver	(no value)	Group'. Click 'OK' when done.
Budget Approver	(no value) V	
Evaluation Committee	(no value)	
P&C Approver	State Purchase and Contract Approver - Fc 🔥 Add more	

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.

1. 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.

Overview Documents Tas	Click on the 'Documents' tab to display the	History
Test Sourcing Project	document folders related to the SP. Expand folders by clicking the left blue arrow to display	Show Details Actions 🔻 🎫
Name	the documents within each folder. Note the	Status
► C Sourcing Project Documents ∨	'Owner' and 'Status' to the right.	
▼ 🖬 Solicitation Document ∨	Project Owner	
RFP_Agency_For_Services V	Project Owner	Not Edited
Sourcing Event V	Project Owner	
Document Templates V	Project Owner	

2. 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.

3. 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.

Replace Document	
Choose a document to replace the Original Document and enter a Description to expla	Upload a document by browsing the computer via 'Choose File', or drag-and-drop the
Original Document: 🖾 RFP_Agency_For_Services.docx	document from the computer's desktop into the
Description:	'Or drop file here' box and click 'Replace'.
New Document: Upload	
Or drop file here	Browse
Replace original document with a document from a pro-	ject
	Replace Cancel

- 4. 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'.
- 5. 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.

Overview	Documents	Tasks	Team	Message Board	Event Messages	History	
Example Sourcir	ng Services Proje	ect					Show(Details Actions -
Name						Owner	Status
Sourcin	g Project Documer	nts∨				Project Owner	
Solicitar	tion Document \checkmark					Project Owner	Ţ
Sourcin	g Event∨					Project Owner	
Award I	Recommendation [Documents∨		-		Proiect Owner	
► 🗋 BAFO D	ocuments∨				The 'Actions'	drop-down, from	which to create a new folder.
Document	ent Templates 🗸						ill be located beneath the
► 🗋 New Fo	lder∨				existing folder	structure.	

- 6. 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.
- 7. Click the drop-down arrow to the right of the document to be deleted and select '**Move**' from the dropdown menu beneath '**Action**'.

Test Sou	Ircing Project				Task	ID WS81069241 ks: Incomplete Tasks: 0 kse: 01 - LAUNCH PROJECT
					Guilent Hus	
Overvie	ew Documents	Tasks	Team	Message Board	Event Mes	sages History
Test Sour~	Action				Show Details	Actions 🔻
Name	Download Draft			Select 'Move' from		Status
	View Details			down menu that di once a user clicks		Draft
	Edit Attributes	~		down arrow to the	right of	
	Сору			the document (obs drop-down menu).		
▶ □ <	Move			diop-down menu).		
	Publish			Project O	wner	
	Add to Quick Links					

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.

Overvie	ew Documents	Tasks Team	Message Board Event Messag	ges History
est Sourci	Action	Pent Templates	Show Details	Actions 🔻
lame	Download Draft		Owner	Status
	View Details		Project Owner	Not Edited
<u>e</u>	Edit Attributes	Meeting Template $ \sim $	Project Owner	Not Edited
	Сору	Templates 🗸	Project Owner	
	Move Publish Add to Quick Links Lock Delete		'Delete' is now an option as the document has been moved outside of the template folder structure.	Draft

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.

Overview	Documents	Tasks Team	Message Board	Event Messages	History	
Search Filter	(All)	Options' dro	s can be adjusted in op-down. Use ' Sear et the selected filter	rch' and 'Reset' to		Search Options V
Topics	Topics	essage Board' can be sorted by ailable columns.	, ,		(Se	arch Reset Post via Email
Title		Created By	Labels	Replies Last P	ost Date 👃	Last Post By
Welcome to	the project!	SourcingUser01	Announcement	0 09/14/	2020 01:28 PM	SourcingUser01
L Add	to 🔻	Remove from 🔻	Delete	New Topic		

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

Topics	Click the 'Title' to see		Post via Email 🗰
Title Created By		es Last Post Date 🖡	Last Post By
Welcome to the project! SourcingUser	-	09/14/2020 01:28 PM	SourcingUser01
↓ Add to ▼ Remove from ▼	Delete	ew Topic	

- a. From this screen, all listed replies and attachments will appear.
- b. Click 'OK' when finished reviewing the message, or 'Cancel' to exit without saving changes.
- c. The 'Post Reply' button can be used to post a reply to the Topic.
- d. 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.

View Message Board Topic • Original Post	Full topic details can be found on the left.	Post Rept	OK Cancel
	found a page. A	es to the topic are t the bottom of the dd a reply with the eply' button.	Threaded Attachments

VIII. Tracking Emails in the Message Board

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

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

Topics				_	Post via Email 📰
Title	Created By	Click the 'Post via E	mail' link.	ist Post Date 🗍	Last Post By
Welcome to the project!	SourcingUser01	Announcement	0	09/14/2020 01:28 PM	SourcingUser01
Add to 🔻	Remove from v	Delete	New Topi	c	

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 Copy the email address displayed in the on the The email address below is unique to this workspace email attachments, Internal doers, as well as are as post a topic t through e parties can post left side of the pop-up box to an email --🛛 🝙 📕 🐘 @ansmtp.ariba.com 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 Sourcin	ng Project) WS81069241 : Incomplete Tasks: 0
Overview	Documents Task	cs Team	Message Board	Event Me	ssages	History	,
Messages							Show / Hide Columns
Event † Sourcing Event/Sourcing Event Test	From NC Test Vendor	Contact Name State Supplier	The avai	The available fields		y Sent	V Event
Sourcing Event/Sourcing Event Test	NC eProcurement - TES	T SourcingUser	n checking unchecki	an be adjusted by hecking or inchecking the	45 Not /	Applicabl	✓ Contact Name
Sourcing Event/Sourcing Event Test	NC eProcurement - TES	T SourcingUser	F Nature of an	· • .	44 Not /	Applicabl	✓ Sent Date ✓ To
<			Laan.			_	>