# NC eProcurement

# IT Sourcing Project Quick Guide

This IT Quick Guide is intended to help State Agencies use the NC eProcurement Sourcing Tool to create a Sourcing Project for IT goods or services, submit applicable documents to the NC Department of Information Technology (NCDIT) for review and approval, publish and conduct a Sourcing Event, and determine the awarded vendor.

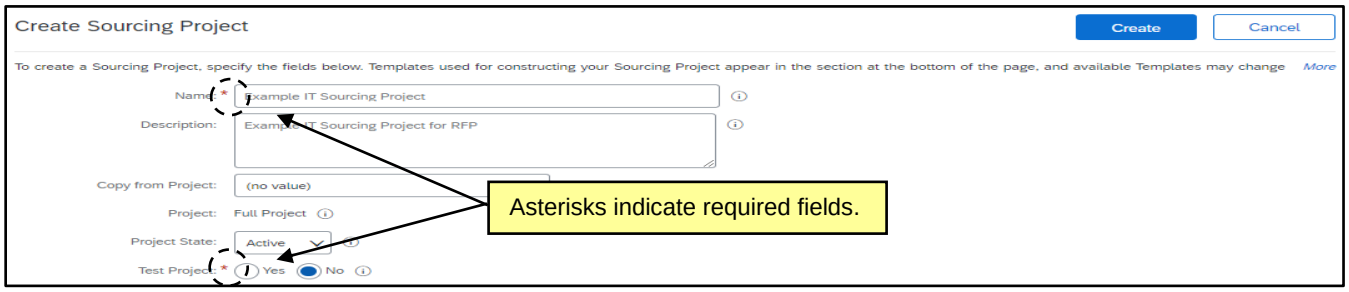
A Sourcing Project (SP) is a container for all information and documents pertaining to a formal solicitation for goods or services. During the creation of a SP, the Sourcing Project Owner (e.g., Agency Procurement) will select if the SP is for Non-IT or IT items. This Quick Guide is for SPs that are for IT goods or services. A Sourcing Event is a very important part of a Sourcing Project and is the electronic forum for vendors to respond to the solicitation with their bids or proposals.

To access the NC eProcurement Sourcing Tool, please go to this link. For a more detailed explanation of the end-to-end IT Procurement Process, please review the Playbook / Training Guide at this link. If you have any questions or issues accessing or using the NC eProcurement system, please contact the NCEP Help Desk at 888-211-7440, option 3 or send email to ephelpdesk@its.nc.gov

## I. Initiate IT Sourcing Project and Enter Attributes

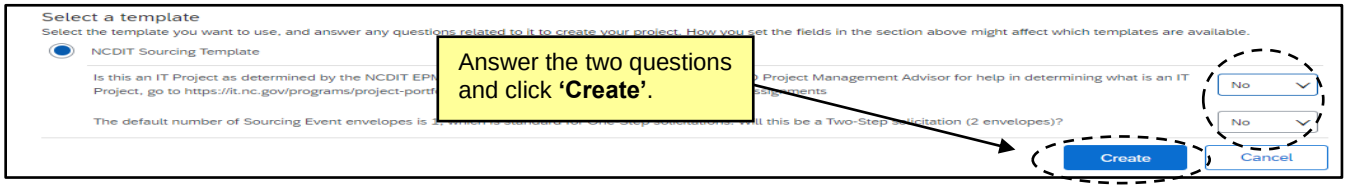
1. Sourcing Project Owners can create a SP in the NC eProcurement Sourcing Tool by clicking on the **'Sourcing Project'** link under the **'Create'** header in the **'Common Actions'** portlet on the left.

2. The **'Create Sourcing Project'** page will display. Populate all relevant fields, including the eight required fields, as noted by an asterisk (*). The Sourcing Project Owner will indicate this is a Sourcing Project for IT items in the **'Solicitation Vehicle'** dropdown (not shown below) by selecting the applicable IT solicitation type (e.g., IT: RFQ, IT: IFB, IT: SOW, IT: RFP, IT: Exception Request Only).




3. In the **'Select a template'** section of the **'Create Sourcing Project'** page, note the radio button next to the **'NCDIT Sourcing Template'** template is automatically selected. The Sourcing Project Owner will be prompted to answer two questions indicating whether the solicitation is an **"**IT Project" per NCDIT Enterprise Project Management Office guidelines, and whether it will follow a "Two-Step" process or not. One envelope is standard, so the Sourcing Project Owner would typically select **'No'** in the second question to follow the common path.

   **Note:** This Quick Guide follows the process when the answer to both of these questions is **'No'**.



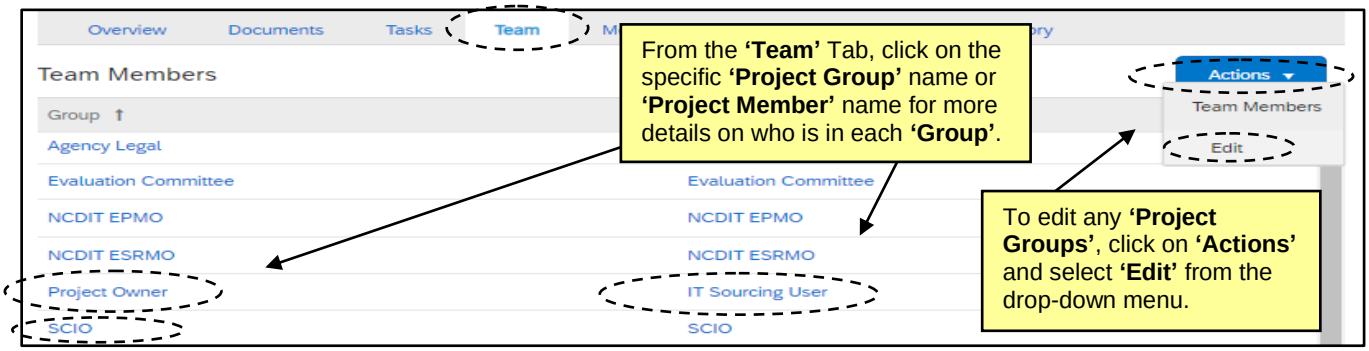

4. Click the **'Create'** button on the top or bottom right of the screen.

## II. Navigate to the Team Tab and Confirm Sourcing Team Members

After clicking **'Create'** on the **'Create Sourcing Project'** page, the SP is saved and the **'Overview'** tab is displayed. Navigate to the **'Team'** tab and add any other users who need access to the SP. By default, only the Sourcing Project Owner who clicked **'Create'** can edit the SP at this point.

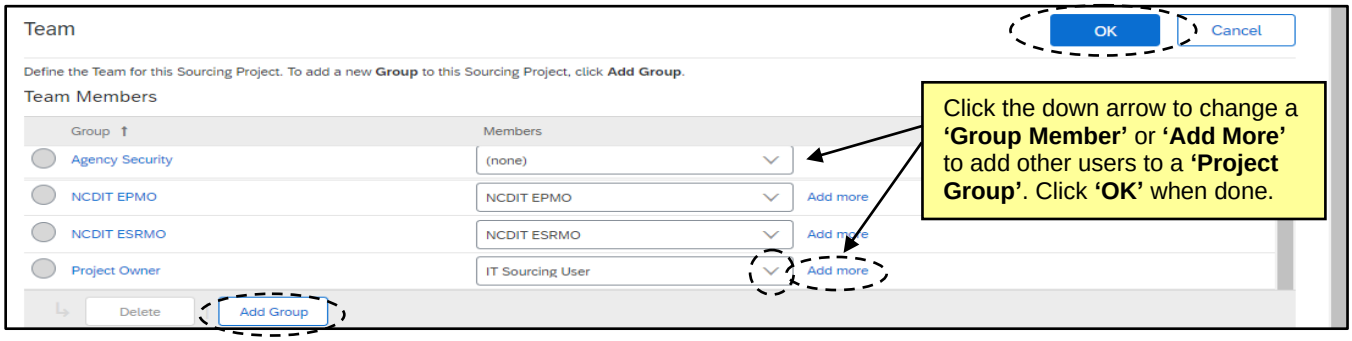
1. On the **'Team'** tab, click on **'Actions'** and select **'Edit'** from the dropdown to add other users as members to the preloaded groups.

   **Notes:**
   - Users added to the **'Project Owner'** group will be able to edit the SP.
   - It is very important that the **'Agency CIO'** and **'Agency IT Security'** groups be populated with at least one user for approval purposes. If these groups are not automatically populated with users, the Sourcing Project Owner should manually add an appropriate user(s).




2. 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 **'Team Groups'** to be added. When all changes have been made, click **'OK'**.

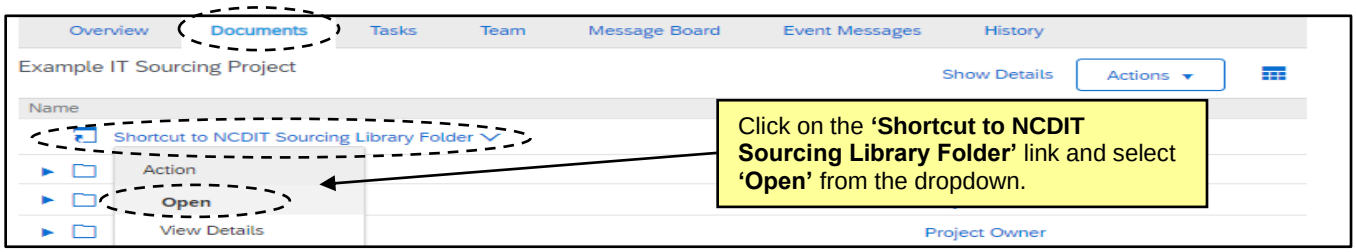
   **Note:** Any changes made to the **'Team'** tab within a SP only apply to that SP and not to other SPs also created by the same Sourcing Project Owner.



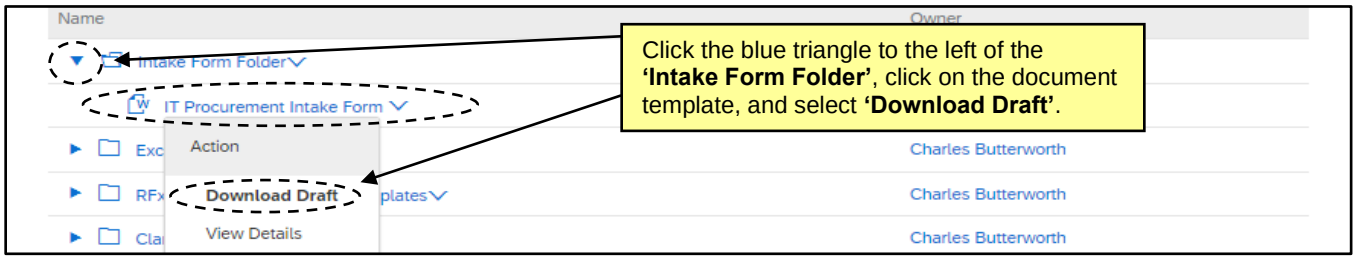
## III. Navigate to the Documents Tab to Upload IT Procurement Intake Form

The **'Documents'** tab is a central storage location for most documents related to a SP. It includes a **'Shortcut to NCDIT Sourcing Library Folder'** where the Sourcing Project Owner can download document templates to use during their SP. The Sourcing Library contains specifically named folders that are connected to Approval and Review Tasks on the **'Tasks'** tab, where the Sourcing Project Owner will store completed versions of their documents. The Sourcing Library also contains a folder housing the Sourcing Event that the Sourcing Project Owner will publish, link to on IPS (if applicable), and through which vendors will submit their solicitation responses.

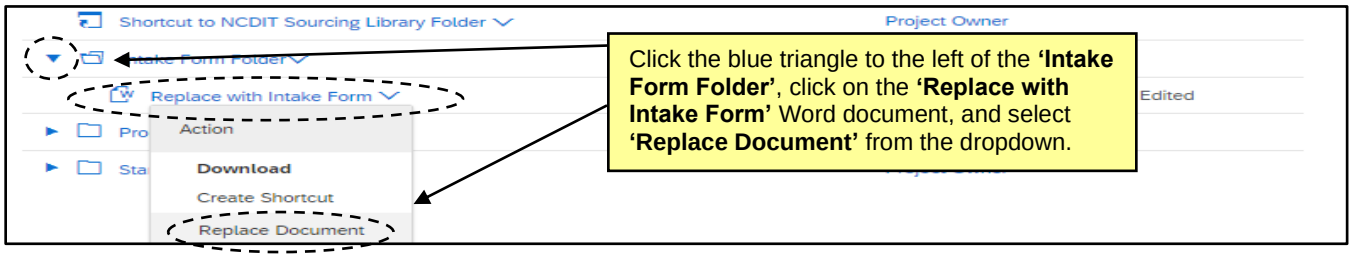
1. To start the IT procurement process, the Sourcing Project Owner will need to upload a completed **'IT Procurement Intake Form'** to the **'Documents'** tab. The **'IT Procurement Intake Form'** is generally completed by Agency Business and may be submitted to Agency Procurement as an attachment to a Purchase Requisition. Agency Procurement may have to download a blank **'IT Procurement Intake Form'** to provide to Agency Business by clicking on the **'Shortcut to NCDIT Sourcing Library Folder'** link at the top of the **'Documents'** tab and selecting **'Open'** from the dropdown.




2. Click the blue triangle to the left of the **'Intake Form Folder'**, click on the **'IT Procurement Intake Form'** Word document, and select **'Download Draft'**.



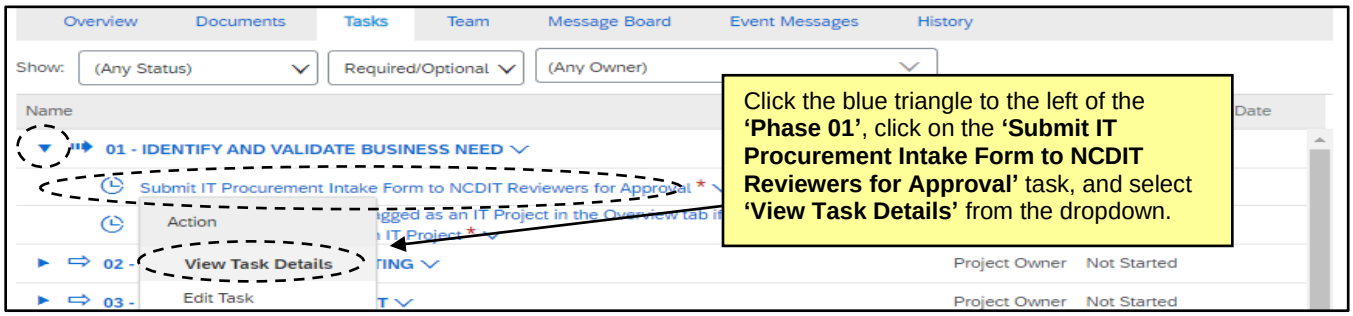

3. When the Agency Business user has provided the Sourcing Project Owner with a completed version of the **'IT Procurement Intake Form'**, the Sourcing Project Owner will need to upload it to the SP. Back on the **'Documents'** tab, click the blue triangle to the left of the **'Intake Form Folder'**, click on the **'Replace with Intake Form'** Word document, and select **'Replace Document'** from the dropdown. Choose the completed version of the IT Procurement Intake Form, follow the steps on the subsequent pages to **'Replace document by the updated file'**, click **'OK',** and then **'Save'**. The document's **'Status'** will update from **'Not Edited'** to **'Draft'** when replaced.



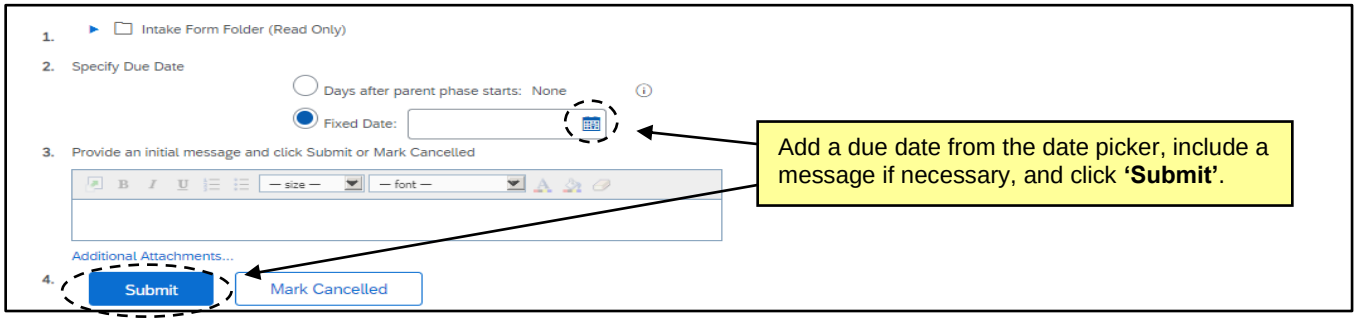
## IV. Submit IT Procurement Intake Form for Approval

The **'Tasks'** tab contains a road map for completing a SP for IT items. There are ten Phases on the tab that each contain various tasks. Some tasks are required to be completed and are marked with a red asterisk. Some tasks contain predetermined workflows to involve NCDIT for review or approval of documents, while others suggest steps to keep in mind as the solicitation progresses. The first task in **'Phase 01'** is mandatory and instructs the Sourcing Project Owner to **'Submit IT Procurement Intake Form to NCDIT Reviewers for Approval'**.

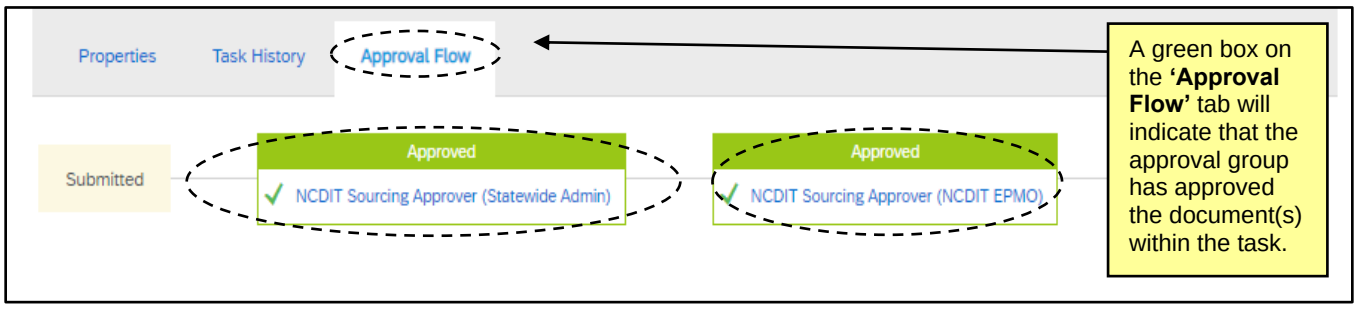
1. On the **'Tasks'** tab, click the blue triangle next to **'Phase 01'** and click on the **'Submit IT Procurement Intake Form to NCDIT Reviewers for Approval'** task. Select **'View Task Details'** from the dropdown.




2. On the subsequent **'Approval Task'** page, it is important to specify a due date from the date picker in the **'Fixed Date'** field. We recommend giving a minimum of five business days for NCDIT to complete its approval. Click **'Submit'** to send the document to NCDIT for approval.




3. When the task has been submitted, its **'Status'** on the **'Tasks'** tab will automatically update to **'In Approval'**. To monitor the process of the review, click on the task and select **'View Task Details'** from the dropdown. Look for any comments by approval groups on the **'Task History'** tab (visible upon scrolling down the **'Approval Task'** page). To note approval groups who have approved the document, click on the **'Approval Flow'** tab next to **'Task History'** and look for the green **'Approved'** boxes. The **'Status'** of the **'Tasks'** tab will automatically update to **'Approved'** when all groups have approved.



4. The second task in **'Phase 01'** asks the Sourcing Project Owner to confirm that the SP is flagged correctly regarding its status as an IT Project based on NCDIT EPMO's response to the IT Procurement Intake Form. If the Sourcing Project Owner needs to adjust the initial answer to the template question asking of the SP was for an IT Project, the Sourcing Project Owner should go to the **'Overview'** tab, click **'Actions'**, and select **'Edit Overview'** from the dropdown. On the subsequent **'Edit'** page, click the **'Template Questions'** tab, change the answer to the first question as needed, then click **'OK'**.

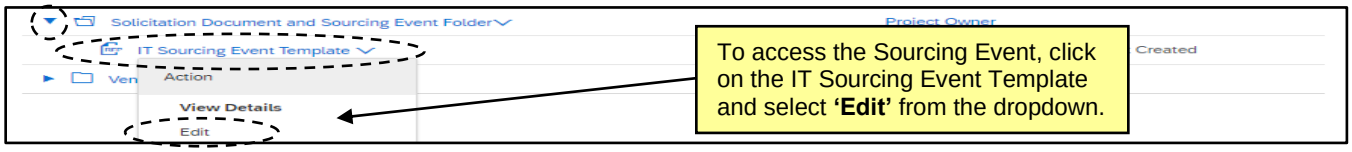
## V. Populate Solicitation Document and Initiate Sourcing Event

Once all applicable tasks are complete in **'Phase 02'**, the Sourcing Project Owner should proceed to **'Phase 03'** to populate the Solicitation Document and initiate the Sourcing Event. The Sourcing Event is the interactive part of the SP where vendors can provide their responses. Prior to sending the Sourcing Event to the Agency CIO and NCDIT for approval, the Sourcing Project Owner will initiate only **Section 1 (Rules)** and **Section 3 (Content)** before saving. The information included in the Solicitation Document is complementary to that in the Sourcing Event content.

1. From the **'Documents'** tab, click on the **'Shortcut to NCDIT Sourcing Library Folder'** and select **'Open'** from the dropdown. Click the blue triangle next to the **'RFx Solicitation Document Templates'** folder and click on the template document that matches the type of solicitation being posted. Select **'Download Draft'** from the dropdown, populate the template, and save a local copy.

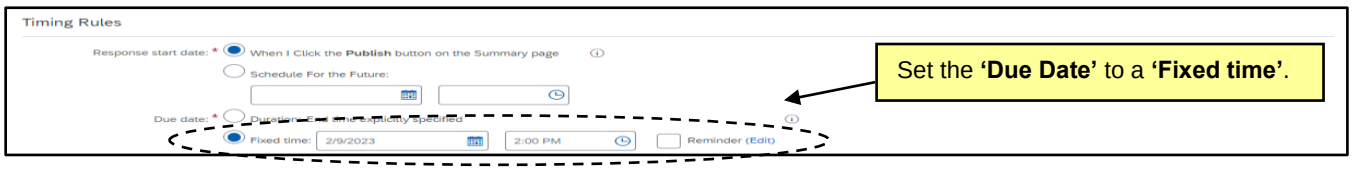
2. Back on the **'Documents'** tab, click the blue triangle to the left of the **'Solicitation Document and Sourcing Event Folder'**, then click the **'Replace with Draft IT Solicitation Document'** placeholder. Select **'Replace Document'** from the dropdown and choose the completed version of the Solicitation Document. Follow the steps on the subsequent pages to **'Replace document by the updated file'** and click **'OK'** and then **'Save'**.

3. In the same folder, click on the **'IT Sourcing Event Template'**, and select **'Edit'** from the dropdown to access to the Sourcing Event.



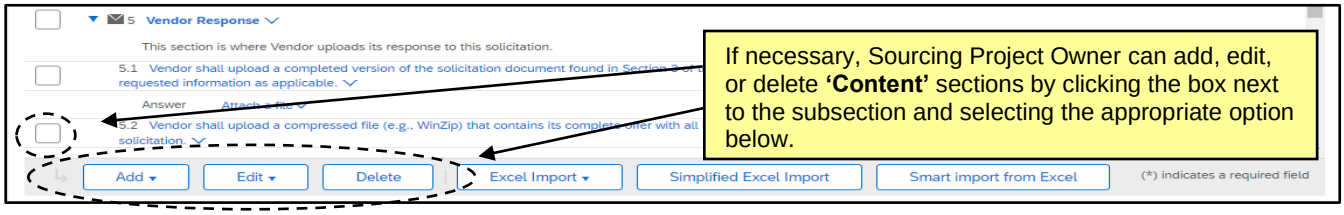

4. After adding a **'Title'** and **'Description'** on the subsequent **'Edit Event'** page and clicking **'OK'**, **Section 1 (Rules)** of the Sourcing Event will display. Under **'Timing Rules'**, set the **'Due date'** field to **'Fixed time'** and select the date and time for vendor bids to be due as established in the Solicitation Document.

   **Note:** The **'Due Date'** may need to be adjusted before the Sourcing Event is published if changes are made during the approval process.




5. When the **'Due date'** has been set, click onto **Section 3 (Content)** on the left side of the screen.

6. Scroll to **Section 5** to review the **'Vendor Response'** subsections. Content can be added, deleted, or edited as necessary by checking the box next to the relevant subsection and clicking the appropriate button below. It is advised to maintain the default structure where xceptpossible.

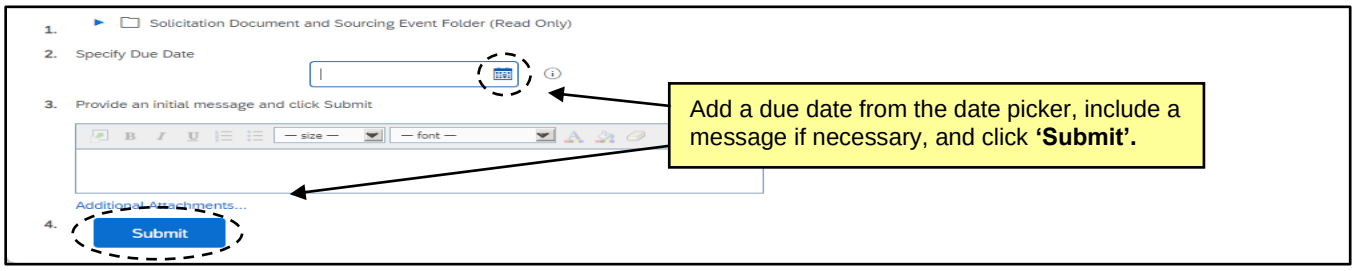



7. Click the **'Exit'** button in the top right and select **'return to project'**, then navigate to the '**Tasks'** tab.

## VI. Submit Draft Solicitation Document for Agency Approval

Before sending the Solicitation Document and Sourcing Event to NCDIT for approval, the documents must first be approved by the **'Agency CIO'** group in **'Phase 03'**. Both documents will serve as the trigger for the approval task, so both must be actioned upon as outlined above before the approval task can be submitted.

1. On the **'Tasks'** tab, click on the **'Submit Draft Solicitation Document for Agency Approval'** task and select **'View Task Details'** from the drop down. On the subsequent **'Approval Task'** page, add a due date from the date picker, add a message to the **'Agency CIO'** if necessary, and then click **'Submit'**. The **'Status'** of the **'Task'** tab will automatically update to **'Approved'** when the **'Agency CIO'** approves.

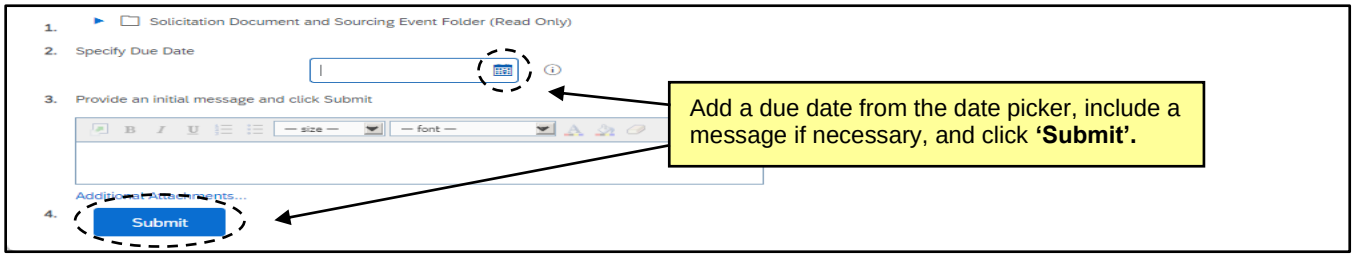



## VII. Gain NCDIT Approval of Solicitation Document and Sourcing Event

When both tasks are complete in **'Phase 03'**, the Sourcing Project Owner can proceed to **'Phase 04'** to submit the Solicitation Document and Sourcing Event for approval by NCDIT.

**Note:** If a Procurement Exception request is needed at this point, the Sourcing Project Owner will submit a completed Procurement Exception Request Form under the first task in **'Phase 04'** to NCDIT for approval. This should be done at the same time the Sourcing Project Owner submits the following Solicitation and Sourcing Event approval task to NCDIT for approval.

1. On the **'Tasks'** tab, click on the **'Gain NCDIT Approval of Solicitation Document and Sourcing Event'** task and select **'View Task Details'** from the drop down. On the subsequent **'Approval Task'** page, add a due date from the date picker (we recommend at least five business days out), add a message to NCDIT if necessary, and then click **'Submit'**.



2. When the task has been submitted, its **'Status'** on the **'Tasks'** tab will automatically update to **'In Approval'**. To monitor the process of the approval, click on the task and select **'View Task Details'** from the dropdown. Look for any comments by a NCDIT approval group on the **'Task History'** tab (visible upon scrolling down the **'Approval Task'** page). To see which approval groups are included in the approval workflow, click on the **'Approval Flow'** tab next to **'Task History'.**

    a. An approval group that has not been sent the approval task will be displayed in the **'Approval Flow'** tab with the word **'Pending'** in the top box that is shaded gray. These groups have yet to receive the approval request and will not become **'Active'** until the approval task is submitted by the Sourcing Project Owner and any previous approval node completes their approval.

    b. An approval group that is currently in the process of approving the task will be displayed in the **'Approval Flow'** tab with the word **'Active'** in the top box that is shaded blue.

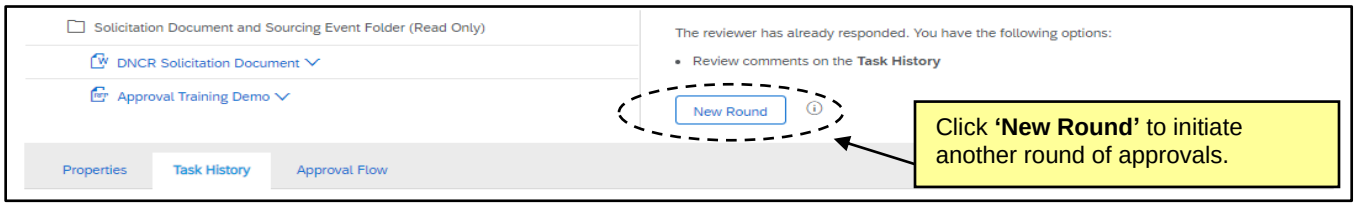
    c. An approval group that has completed its approval will be displayed in the **'Approval Flow'** tab with the word **'Approved'** in the top box that is shaded green.

    **Note:** NCDIT may attach an edited version of the Solicitation Document in the **'Task History'** tab.

3. If NCDIT denies the approval request, the Sourcing Project Owner should work with applicable Agency staff to address NCDIT's feedback and develop an updated Solicitation Document.

4. The Sourcing Project Owner should return to the **'Documents'** tab and replace the Solicitation Document draft with the updated version.

5. The Sourcing Project Owners should go to the **'Gain NCDIT Approval of Solicitation Document and Sourcing Event'** task and click the **'New Round'** button.




6. On the next page, the Sourcing Project Owner can set a new **'Due Date'** (we recommend a minimum of five business days), add a note letting NCDIT know that the identified issues have been addressed, and re-submit the task for another round of approvals.

7. After NCDIT reviews and fully approves the Solicitation Document and Sourcing Event, the task will automatically update to **'Approved'** status on the **'Tasks'** tab and a checkmark will appear to the left.

## VIII. Finalize and Publish the Sourcing Event

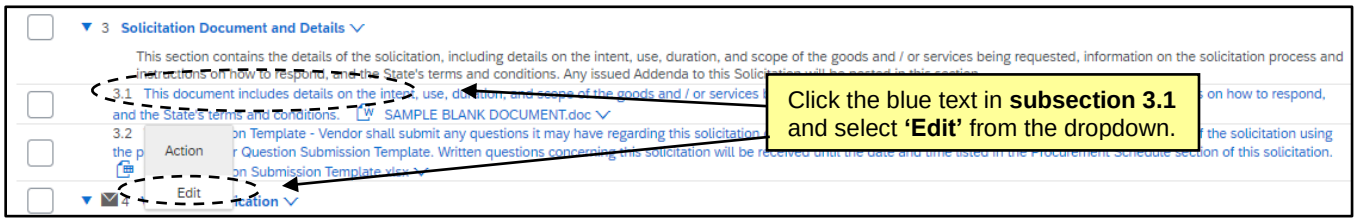
After receiving approval from NCDIT to post the solicitation, the Sourcing Project Owner should finalize the Solicitation Document and then return to **Section 1 (Rules)** of the Sourcing Event to update any dates that may have changed during the approval process. The Sourcing Project Owner should then go to **Section 3 (Content)** and attach the final version of the Solicitation Document to **subsection 3.1** and make any other necessary updates.

The Sourcing Project Owner will then complete **Section 2 (Suppliers)**, where they will **'Create a Supplier Research Posting'** and publish in Ariba Discovery (if applicable). The Sourcing Event can then be published in **Section 4 (Summary)**.

**Note:** If the Sourcing Project Owner wishes to send the Sourcing Event to only a limited number of vendors (e.g., RFQ or SOW), click the **'Proceed To Invite Participants'** link at the top of **Section 2 (Suppliers)** and add the specific vendors instead of following the standard **'Create a Supplier Research Posting'** path. Steps 5 and 6 below are not applicable if vendors are directly invited.

1. From the **'Documents'** tab, access the Sourcing Event by clicking on it and selecting **'Edit'** from the dropdown. Verify the **'Due date'** under **'Timing Rules'** in **Section 1 (Rules).**

2. To add the finalized Solicitation Document, click onto **Section 3 (Content)** on the left side of the screen. Scroll to **subsection 3.1** and click on the blue text in that field. Select **'Edit'** from the dropdown menu.

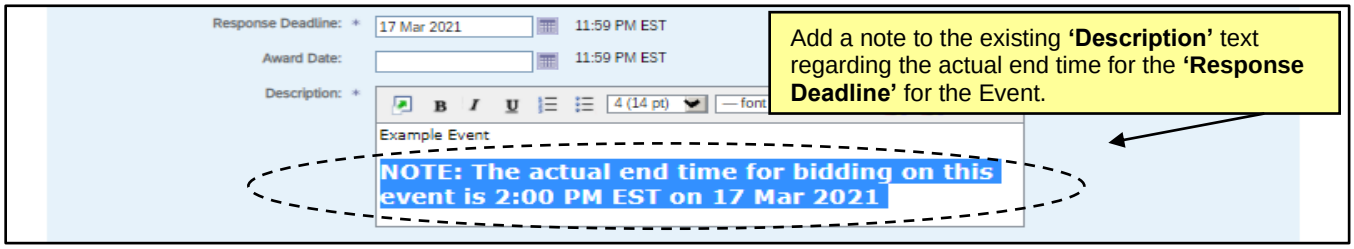



3. Click the **'Update file'** link and select **'Upload a file from desktop'** to replace the sample document with the finalized Solicitation Document, then click **'Done'**.

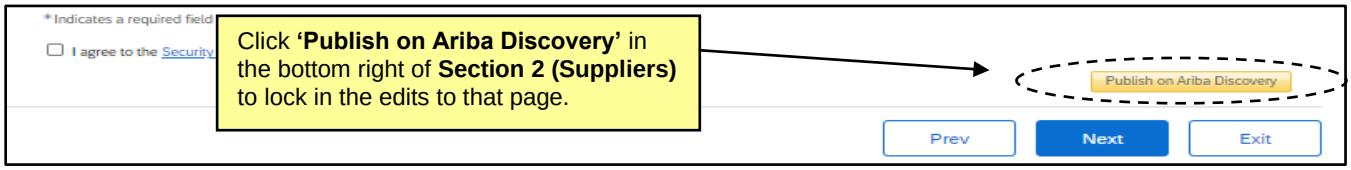
4. Review the subsections in the **'Vendor Response'** section and adjust if necessary.

5. Click onto **Section 2 (Suppliers)** and populate or edit all relevant fields including the six required fields, as noted by an asterisk (*). Some fields will be pre-populated with information from the Sourcing Event.

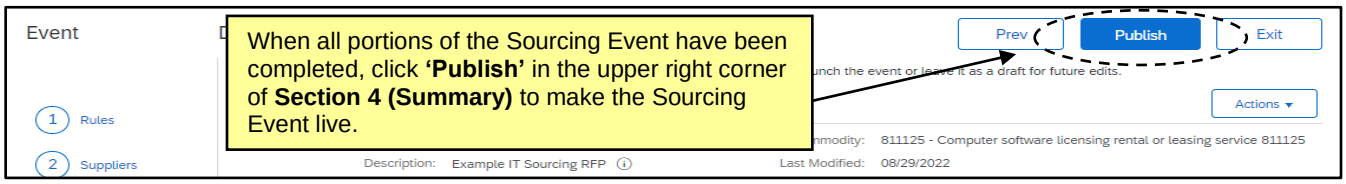
   **Note:** To clarify the **'Response Deadline'** for the vendor, add a note in the **'Description'** stating the end time for the Sourcing Event and accentuate the note by enlarging, bolding, and highlighting the text.



6. When all fields have been completed, click the **'Publish on Ariba Discovery'** button in the bottom right of the page to finalize. If the Sourcing Project Owner navigates away from **Section 2 (Suppliers)** before clicking this button, any updates will be lost.




7. Click onto **Section 4 (Summary)**. If all required aspects of the Sourcing Event have been completed, the **'Publish'** button will be blue and clickable. If there are still incomplete aspects of the Sourcing Event, the **'Publish'** button will be grayed out and a message should alert the Sourcing Project Owner to what is missing. Scroll down to review this page to confirm all information is accurate before clicking **'Publish'**. If edits are necessary, click the **'Actions'** dropdown to edit the **'Overview'**, or return to any of the Sections to make changes. Any changes after clicking **'Publish'** would need to be made as an addendum.

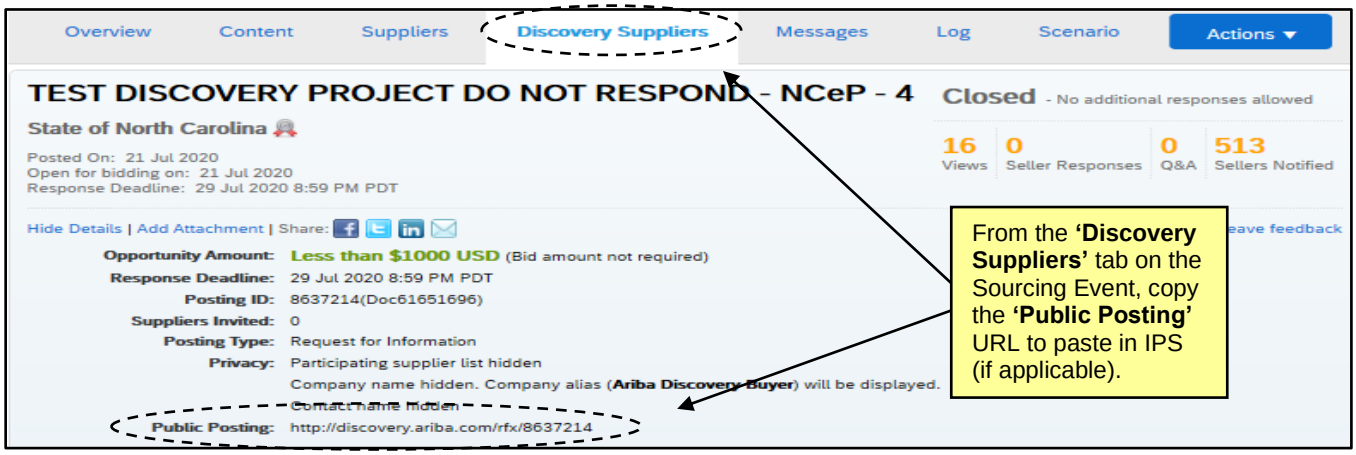



## IX. Post Sourcing Event Summary and Link to Sourcing Event on IPS

The Sourcing Project Owner can return to a published Sourcing Event by selecting the option to **'Monitor'** it, either directly after clicking **'Publish'** or any other time via the Sourcing Event within the **'Documents'** tab. Immediately after publishing a Sourcing Event, the Sourcing Project Owner should navigate to the newly created **'Discovery Suppliers'** tab to copy the **'Public Posting'** URL to paste in the **'NCEP URL'** field when creating the IPS posting (if applicable). Vendors wishing to respond to the solicitation will then follow that URL to access and respond within this Sourcing Event.

1. Return to the Sourcing Event by selecting the **'Monitor'** option.

2. Click on the **'Discovery Suppliers'** tab and copy the URL in the **'Public Posting'** field. Go to IPS and populate the Solicitation Posting, pasting this URL into the **'NCEP URL'** field (if applicable).



# X. Submit Draft Award Recommendation and Leading Vendor Proposal(s) to NCDIT for Review

After posting the solicitation and conducting the Sourcing Event, the tasks in **Phases 05 – 07** in conjunction with the IT Procurement Process Playbook / Training Guide will outline the steps required towards arriving at an Award Recommendation. The **'Submit Award Recommendation and Leading Vendor Proposal(s) to NCDIT for Review'** task at the end of **'Phase 07'** will give the Agency some initial feedback from NCDIT.

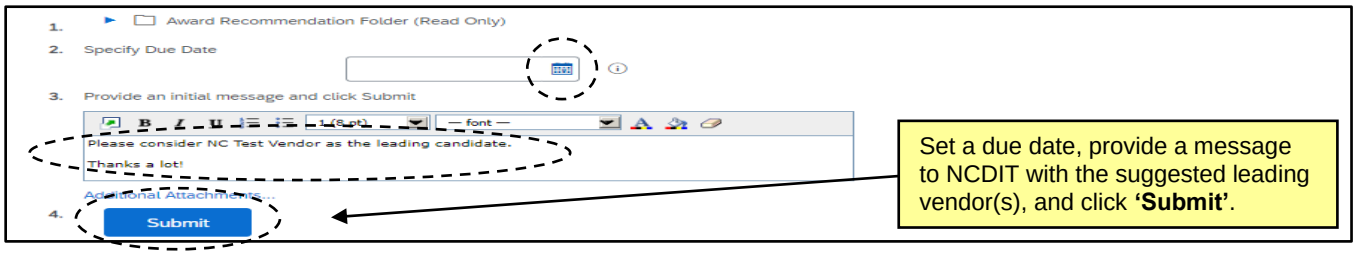
1. From the **'Documents'** tab, navigate to the **'Sourcing Library'** and download the template in the **'Award Recommendation Folder'**. Populate the template with the process used by the Agency to evaluate the vendor responses and identify the leading vendor response(s). Save a local copy before navigating back to the **'Documents'** tab. Replace the placeholder document in that **'Award Recommendation Folder'** with the completed version.

2. Click the **'Leading Vendor Proposal(s) Folder'** and select **'Document'** beneath **'Upload'** in the popup.

3. On the subsequent **'Create Document'** page, choose any relevant files from the leading vendor's response to attach for NCDIT to consider. Click **'Create'** then **'Done'**. Repeat these steps for as many documents that need to be uploaded.

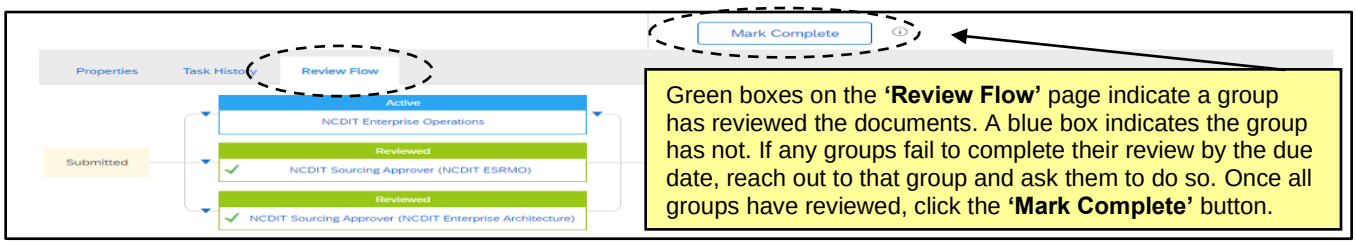
4. Navigate to the **'Tasks'** tab and click on the **'Submit Award Recommendation and Leading Vendor Proposal(s) to NCDIT for Review'** task. Select **'View Task Details'** from the dropdown.

5. On the subsequent **'Review Task'** page, specify a due date from the date picker (we recommend a minimum of five business days) and include a message to NCDIT indicating the leading vendor(s) on which they should focus their review, then click '**Submit'** to send the task to NCDIT for review.




6. When task has been submitted, its **'Status'** on the **'Tasks'** tab will automatically update to **'In Review'**. To monitor the process of the review, click on the task and select **'View Task Details'** from the dropdown. Look for any comments by an NCDIT review group on the **'Task History'** tab (visible upon scrolling down the **'Review Task'** page). To note the review groups who have reviewed the document, click on the **'Review Flow'** tab next to **'Task History'** and look for the green **'Reviewed'**.

   **Note:** If all reviewers in the **'Review Flow'** have not completed their review by the requested due date, the Sourcing Project Owner should contact those reviewers and ask them to do so when convenient. When all have completed their review, click the **'Mark Complete'** button to indicate the task is done.



## XI. Send Award Recommendation Draft to NCDIT for Approval

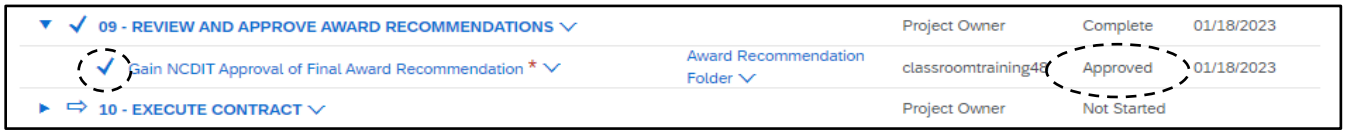
Following any final negotiations per **Phase 08**, the Sourcing Project Owner can proceed to **Phase 09** to complete the **'Gain NCDIT Approval of Final Award Recommendation'** task. This is the final required **'Approval Task'** in the IT procurement process.

1. If any information on the **'Award Recommendation'** document requires an update following vendor negotiations, the Sourcing Project Owner should finalize the document and replace the draft version with the final version in the **'Award Recommendation Folder'** on the **'Documents'** tab.

2. Navigate to the **'Tasks'** tab, click on the **'Gain NCDIT Approval of Final Award Recommendation'** task and select **'View Task Details'** from the drop down.

3. On the subsequent **'Approval Task'** page, specify a due date (we recommend a minimum of five business days) and click **'Submit'** to send the request to NCDIT for approval.

4. After NCDIT reviews and approves the final **'Award Recommendation'** document, they will attach a **'Certification for Award Memo'** and the task will automatically update to **'Approved'** status.




## XII. Appendix

The above steps outlined the main tasks to be completed when conducting a SP for IT items. However, there are several other tasks that may be necessary within the flow of some SPs depending on the nature of the solicitation. Those tasks are broken down into three types: **'To Do Tasks'**, **'Review Tasks'**, and **'Approval Tasks'**. Below are some notes about each type of Task.

**To Do Tasks**

- **'To Do Tasks'** are reminders of steps that may need to be taken to complete a SP.

- The Sourcing Project Owner should choose to **'Mark Complete'** when the action described in the task has been finished to let themselves and others know where in the process the SP stands. To do so, click on the task and select **'Mark Complete'** from the dropdown.

- If a listed task is not applicable to the SP, the Sourcing Project Owner should mark the task as cancelled to let themselves and others know that the task was not needed. To do so, click on the task, select **'View Task Details'**, then select **'Mark Cancelled'**, and then select **'OK'**.

**Review Tasks**

- An example of completing a **'Review Task'** was demonstrated in **Section X** of this document.
- As a reminder, if any reviewers in the **'Review Flow'** have not completed their review by the requested due date, the Sourcing Project Owner can contact those reviewers and ask them to do so at their earliest convenience. When all have completed their review, click the **'Mark Complete'** button to indicate the task is done and move to the next task.
- Below is a list of the other **'Review Tasks'** besides the two demonstrated:
    - **Phase 06: Evaluate Vendor Responses**
    - **Phase 08: Submit updated Draft Award Recommendation to NCDIT for Review (if applicable)**
    - **Phase 08: Submit draft BAFO to NCDIT for Review (if applicable)**

**Approval Tasks**

- Examples of completing **'Approval Tasks'** were demonstrated in Sections **IV**, **VI**, **VII**, and **XI** of this document.
- There are four **'Approval Tasks'** tied to Exception Requests that are only required if they are applicable to the specific SP:
    - **Phase 04: Submit Procurement Exception Request to NCDIT (if applicable)**
    - **Phase 07: Submit Standards Exception Request to NCDIT (if applicable)**
    - **Phase 07: Submit Security Exception Request to NCDIT (if applicable)**
- Each of the exception-related **'Approval Tasks'** are tied to their own exception folder on the **'Documents'** tab, into which completed versions of the relevant exception documents should be saved over the **'Replace with…'** files.
- If additional supporting documents need to be submitted along with the exception forms for NCDIT approval, they can be added to the relevant exception folder on the **'Documents'** tab. The Sourcing Project Owner can click the folder name, select **'Document'** beneath **'Upload'** on the dropdown menu, and then follow the prompts to upload the document(s).