Managing and Awarding a Sourcing Event (IT)

Introduction

Once a Sourcing Event is published and open for bidding, vendors have until the allotted time per the **Due date** to provide electronic responses to the solicitation. These responses are concealed from the Sourcing Project Owner and all other users listed in the **Team** section until envelopes are opened after the **Due date** passes. During the time that a Sourcing Event is open, vendors can ask questions via email or through event **Messages**. The Sourcing Project Owner can respond, if needed, by creating Addendums or even extending the timing of the Sourcing Event. Although awarding the solicitation to the winning bidder does not happen within the Sourcing Tool, there are several steps supporting this process that do. This includes conducting Requests for Clarification, Request for Best and Final Offer (BAFO), and gaining NCDIT's approval of the Award Recommendation.

Learning **Objectives**

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

- Understand how to identify the vendors who intend to participate in this Sourcing Event.
- Understand how to create addendums to add content or extend the timing of a Sourcing Event.
- Understand how to view vendor responses, engage in any negotiations once the solicitation has closed for bidding, and how to gain approval from NCDIT to award the solicitation.

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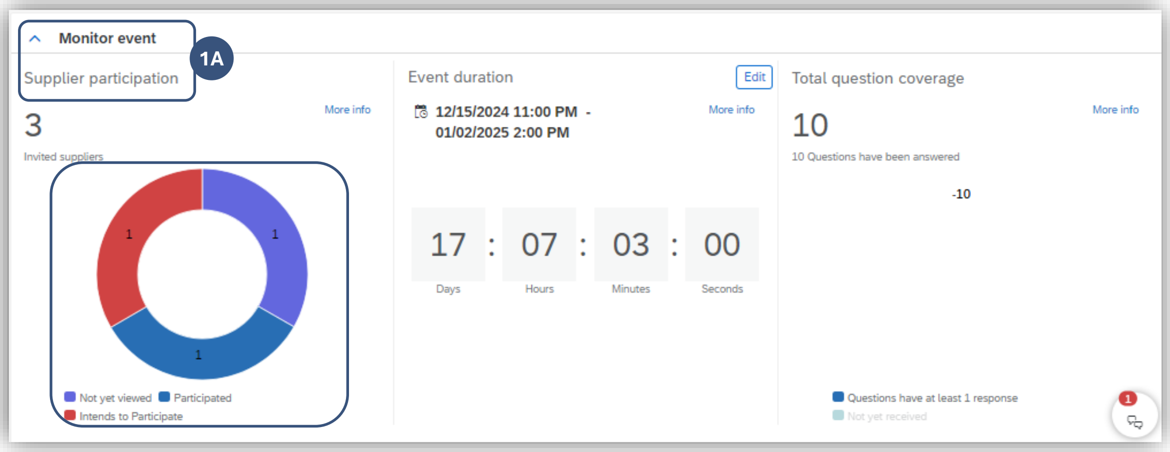
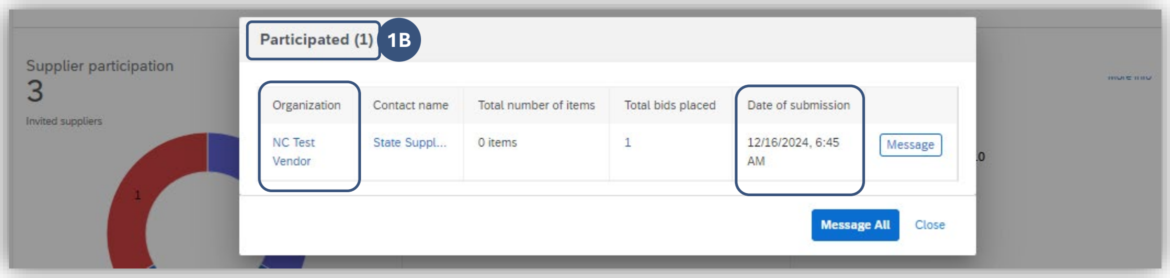
Identifying Participating Vendors and Vendor Questions

1. Even though the Sourcing Project Owner will not be able to see the vendors' actual responses until after the Sourcing Event's **Due date**, Sourcing Project Owners can check the **Suppliers** section at any time to see which vendors have responded. During the Sourcing Event, if vendors have any questions, they will submit them via email or in the Event **Messages** section.

   A. In the **Monitor event** section of the Sourcing Event, the **Supplier participation** section will provide a visual summary of the suppliers linked to the Event. The color-coded graph will indicate which percentage of vendors are in one of three categories. **Not yet viewed** indicates the vendor clicked on the **Intends to Participate** link in eVP but has not yet accepted Ariba's terms to see the details of the solicitation. **Intends to Participate** indicates it indicates the vendor has accepted Ariba's terms to respond but has not yet completed their response. **Participated** indicates that the vendor has submitted a response to the solicitation.



   B. For more detail on the Event's vendor interaction, click on one of the segments of the graph to see which specific vendors are in each category. The subsequent pop up will display the vendor, the **Date of submission** if the vendor has **Participated**, and options to **Message** vendors directly or **Message All** vendors in that category.



Easy access to the Sourcing Event can be found in the **Project Insights** section of the Sourcing Project.

An additional vendor participation report can be generated by clicking the three dots in the top right of the Event then clicking on **Download supplier information** in the dropdown and selecting **Download supplier invitation**. Before clicking **Export** on the subsequent screen, click the down-arrow and uncheck the box next to **Address**.

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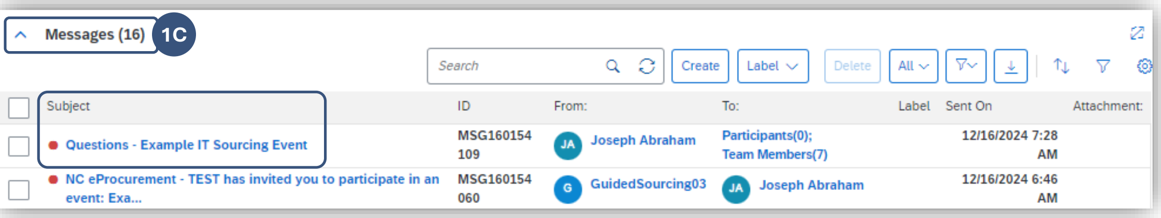
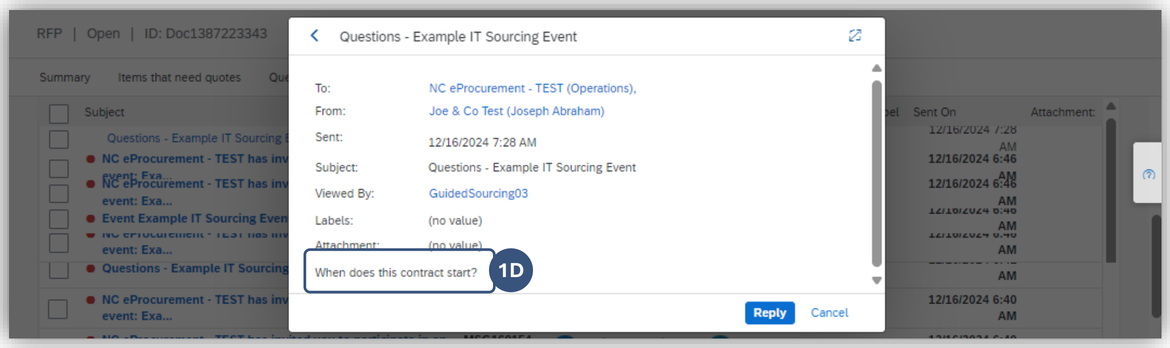
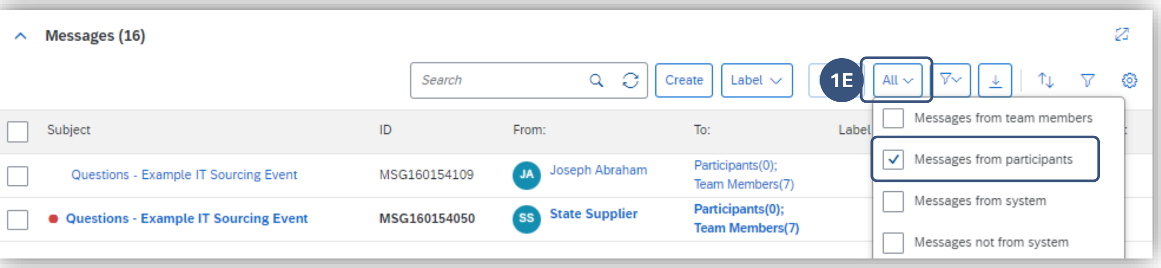
C. If a vendor has any questions during the Q&A period, they are instructed to submit them to the contact listed on the first page of the solicitation document via email or through Sourcing Event **Messages**. Sourcing Project Owners will be notified when they receive an Event **Message** in multiple ways. They will receive an email, a notification will appear on their Ariba Sourcing home page, and a red notification will display in the **Direct Message** bubble in the bottom right of the Event. This feature is not to be used with vendors, but the notification can be helpful. The Sourcing Project Owner can click into the **Messages** section on the Sourcing Event at any time to see these messages. Click on the **Subject** of a message to read it.



D. The **Message** popup will display, and the Sourcing Project Owner can see the vendor's question at the bottom among other details.



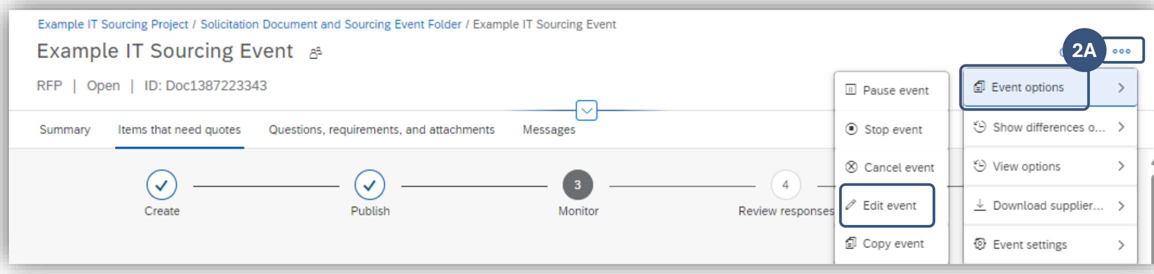
E. To filter the **Messages** section for only messages from vendors, the Sourcing Project Owner can click the **All** button and select **Messages from participants** from the dropdown.



Developing and Posting an Addendum

2 Sourcing Project Owners can provide answers to vendor questions – or make any other necessary updates to the Sourcing Event – by posting an **Addendum** in the Sourcing Event before the **Due date** of the Sourcing Event.

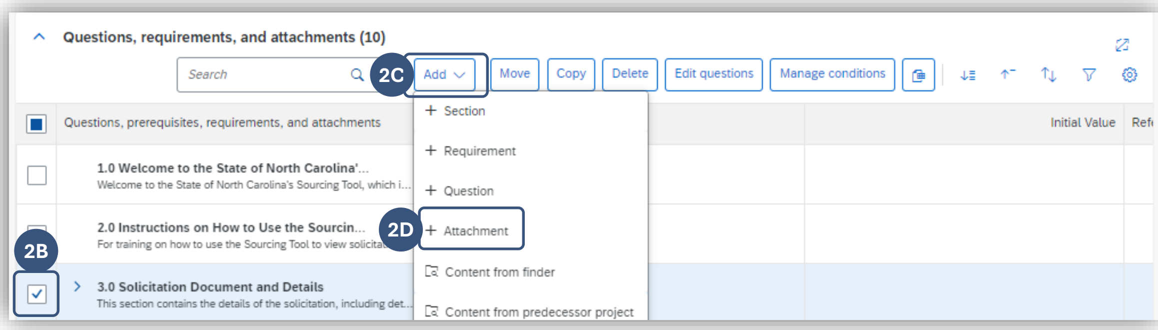
A. When the Q&A period is over and all vendor questions have been reviewed, the Sourcing Project Owner can post an **Addendum** in the Sourcing Event Content to address the questions for all participating vendors to see. Click into the Sourcing Event, click the three dots in the top right, hover the mouse over **Event options**, then select **Edit event** from the popup menu.



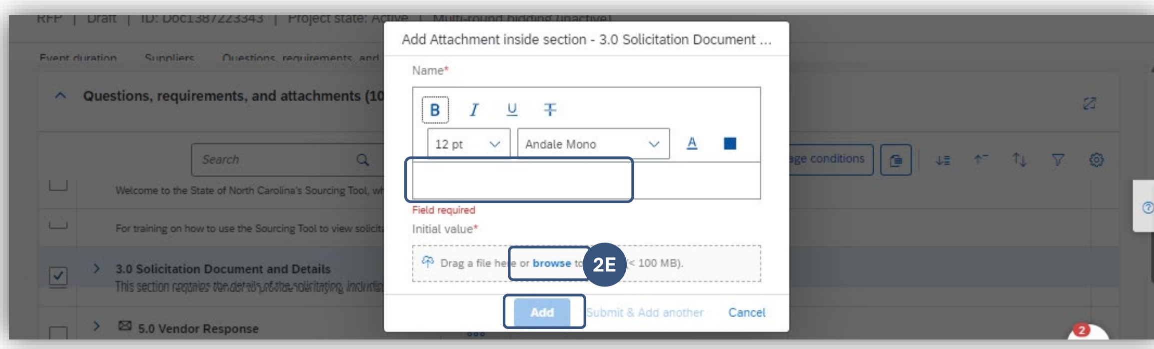
B. Navigate to the **Questions, requirements, and attachments** (Content) section and check the box next to section **3.0 Solicitation Document and Details**.

C. Click the **Add** button at the top of the section.

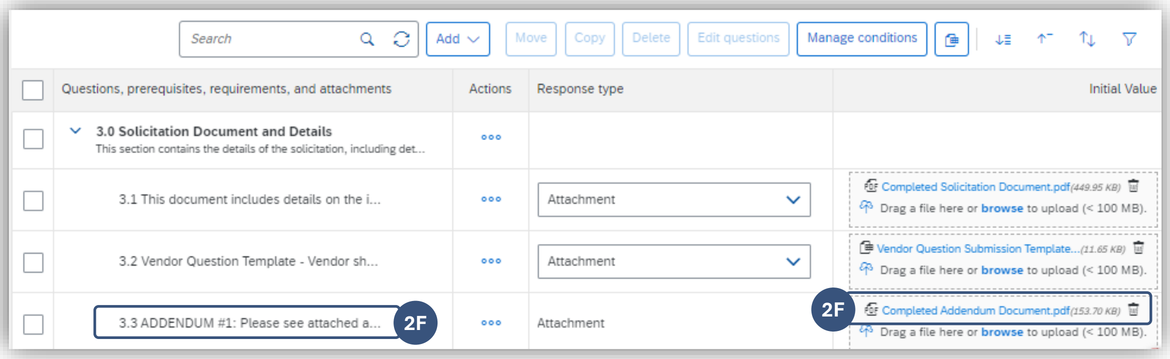
D. Select **Attachment** from the dropdown.



E. The **Add Attachment** popup will display, and the attachment will automatically be assigned to subsection **3.3**. Click **browse** to attach the completed Addendum document in the **Initial Value** field and add a description in the **Name** field to let the vendors know this is where they can find the answers to their questions, then click **Add**.



F. The newly added subsection **3.3** will now display with the Addendum document attached for the vendors to review.

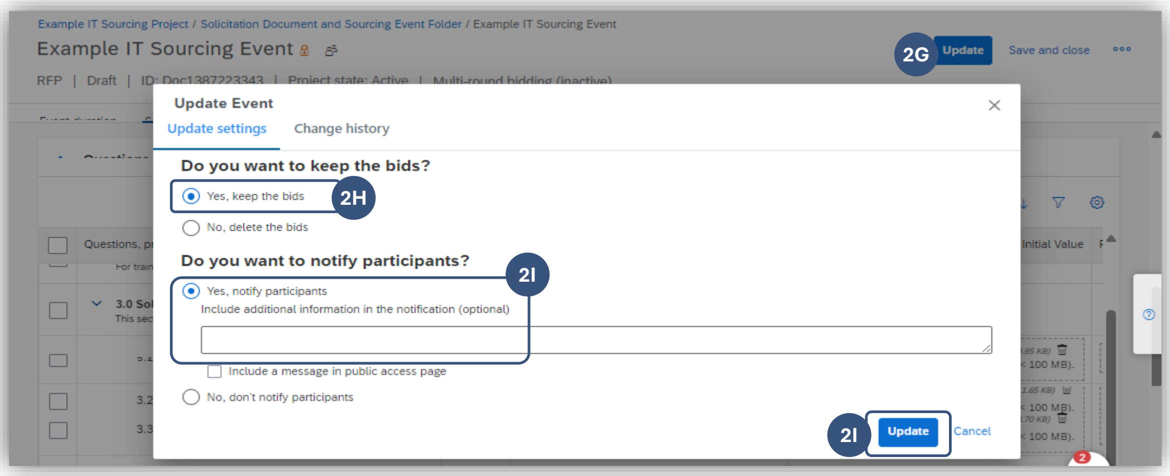


G. If all edits are complete, click **Update** in the top right.

H. On the **Update Event** popup, leave the **Yes, keep the bids** radio button selected.

I. Keep the **Yes, notify participants** radio button selected and enter an informative message in the text box to give the vendors a little more context around the change being made to the Sourcing Event. Ignore the bottom two fields then click the **Update** button in the bottom right to finalize the addendum.

Clicking on the **Change history** tab of the **Update Event** popup will display the current Pending Changes to review before finalizing the update. If the change is not what was expected, click **Cancel** and continue editing the Sourcing Event.



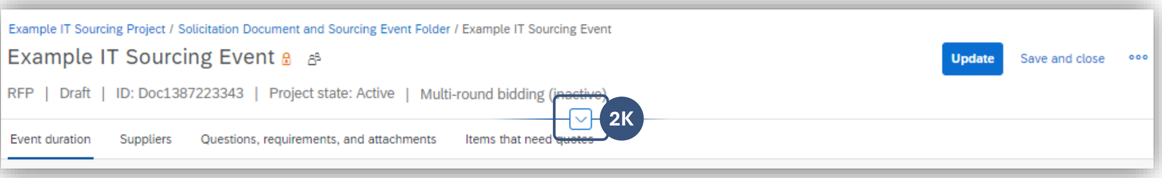
J. The addendum and any new attachments from Section **3** of the Sourcing Event will be automatically posted to Public eVP and the HUB Opportunities page, and they can be found on the **Addenda** and **Documents** tabs of the solicitation in the Agency App. If there were any issues with the public posting, the user will receive an email stating “There was an error while posting your solicitation.” For more information on the eVP version of the addendum, please see the Viewing Posted NCEP Solicitations in eVP Job Aid.

There are three optional tasks in the Sourcing Project related to **Addendums** that the Sourcing Project Owner can elect to complete, but they are not required.

K. To update the Event **Description** or **Commodity Code(s)** during an Addendum, click the **Expand Header** dropdown arrow at the top of the Sourcing Event. Click the **Edit** button in the expanded section to make the updates, click **Save**, and complete the **Addendum** by following the instructions outlined above in **steps 2 G – I**.

L. If the Sourcing Project Owner does not want to go through with the changes made during an **Edit**, they can click the three dots, hover over **Event options**, and select **Discard changes** from the popup menu.

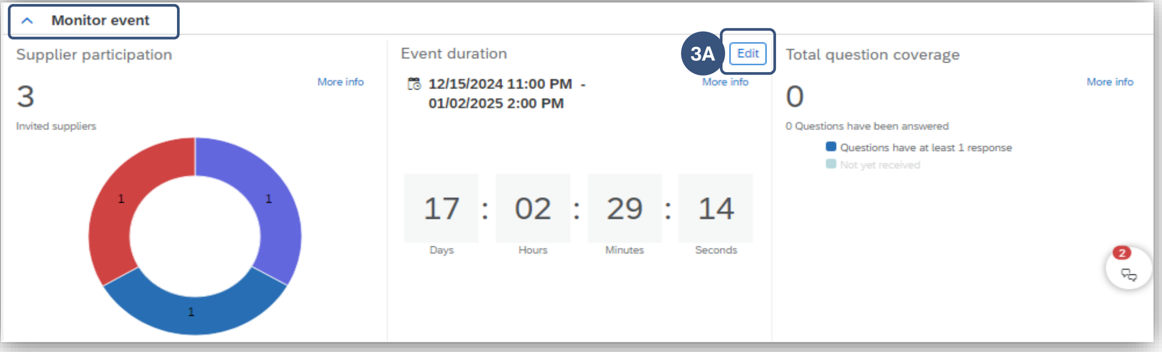
Although it is possible to edit the Sourcing Event **Title** by clicking on it, changes to the **Title** will not transmit to Public eVP. Once a Sourcing Event is **Open**, the public **Title** cannot be updated.



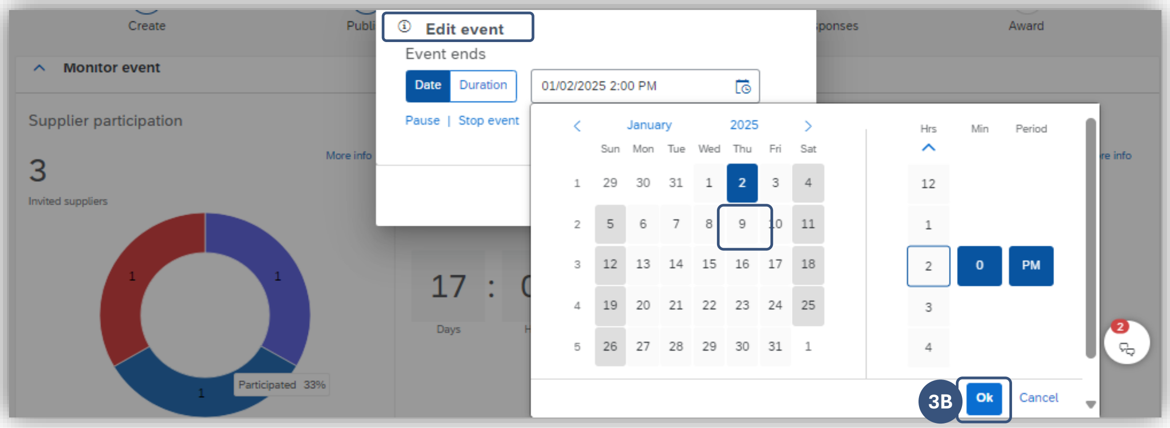
Extending the Timing on a Published Sourcing Event

3 Sourcing Project Owners have the ability to extend the **Due date** and time on a published Sourcing Event if necessary.

A. Click on the **Edit** button next to **Event duration** in the **Monitor event** section.



B. On the subsequent **Edit event** popup, click the date picker and select a new **Due date** from the calendar and click **OK**, then click **Update.**



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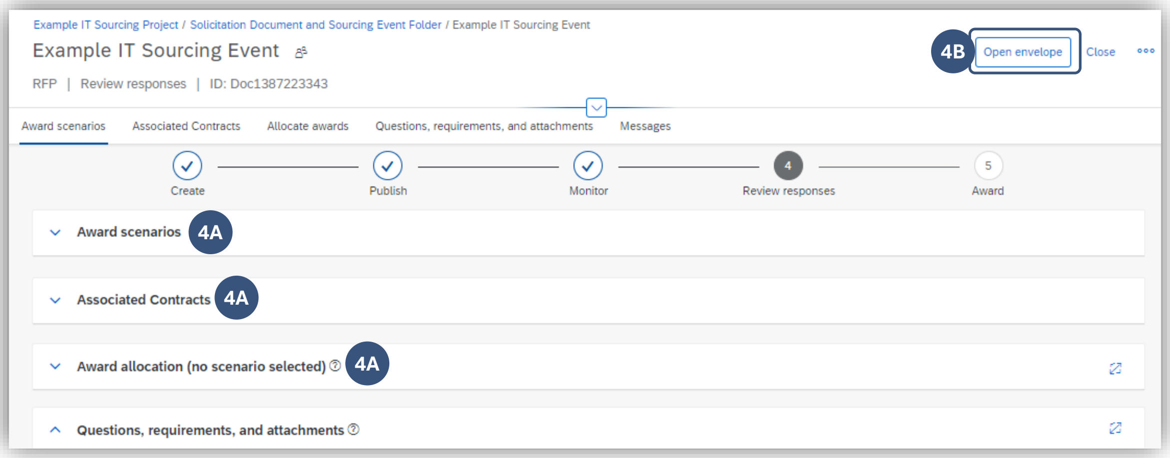
C. The Opening Date timing will be automatically updated in Public eVP and the HUB Opportunities page, and will also be reflected on the on the **General** and **Addenda** tabs of the solicitation in the Agency App. If there were any issues with the public posting, the user will receive an email stating "There was an error while posting your solicitation." For more information on the eVP version of the addendum, please see the **Viewing Posted NCEP Solicitations in eVP Job Aid**.

Opening the Envelopes and Reviewing Vendor Responses

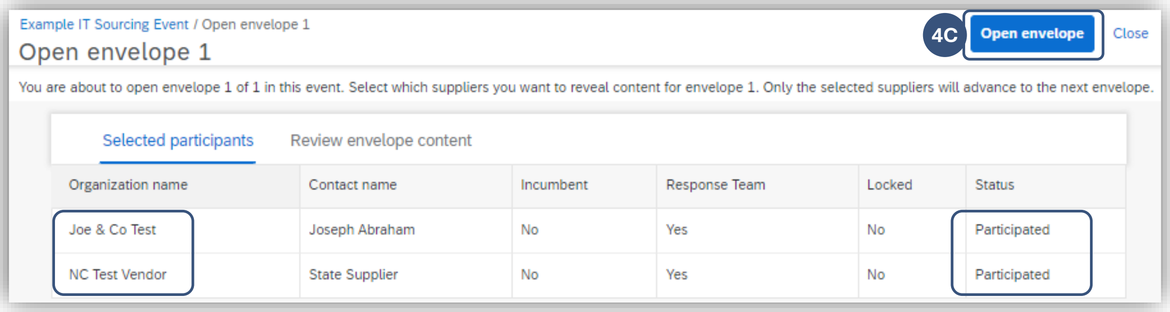
4 When the Sourcing Event reaches the response **Due date**, the event status becomes **Pending Selection**. At this point, the Sourcing Project Owner can open the **Envelopes** to review the responses.

A. When the bidding is closed, the Sourcing Event will go to a **Pending Selection** status. Three new sections will display at the top of the Event; **Award scenarios**, **Associated Contracts, and Award allocation (no scenario selected)**. These sections can be ignored as the awarding process happens outside of the Event.

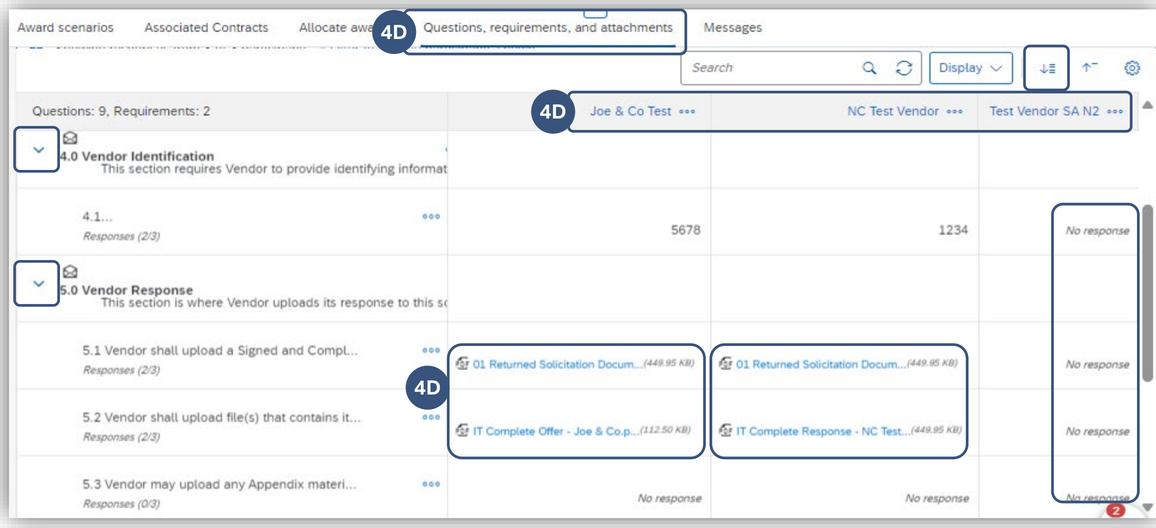
B. The **Open envelope** button will also display in the top right at that time. The Sourcing Project Owner should click this button to reveal the contents of the vendor responses.



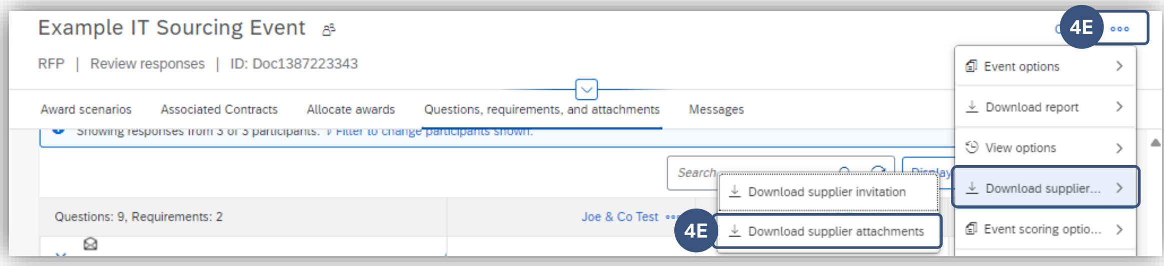
C. The **Open envelope 1** page will display a list of the participating vendors. Click **Open Envelope** again to compare the responses.



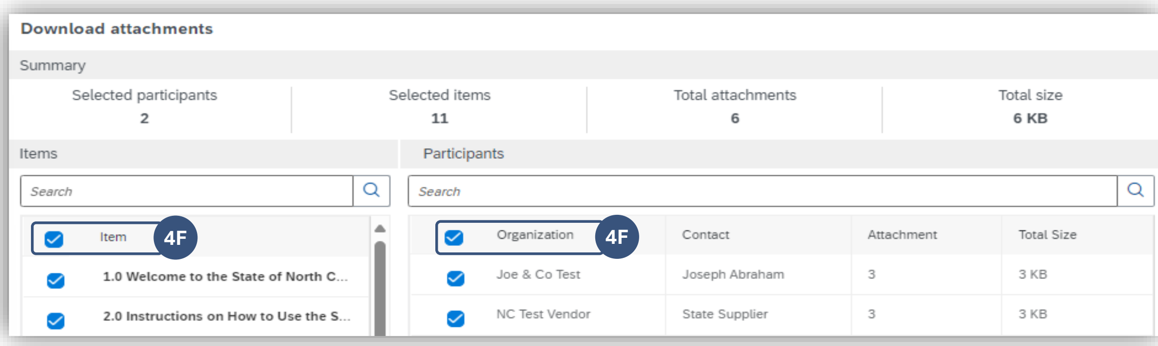
D. Navigate to the **Questions, requirements, and attachments** (Content) section if not already there and scroll down to see the responses revealed to the right of **Section 4** and **5**. The vendors name will display at the top of the column. If there are several responses, the Sourcing Project Owner will have to keep scrolling to the right to see them all. If the sections are minimized, click the arrow to the left of each section to expand the subsections or click the **Expand all** button at the top of the section.



E. To download all supplier attachments at once in a zip file, click the three dots, hover over **Download supplier information**, and select **Download supplier attachments** from the popup menu.



F. On the subsequent **Download attachments** page, it is vital to check the boxes next to **Item** and **Organization** so the system selects the response information before clicking **Download**.



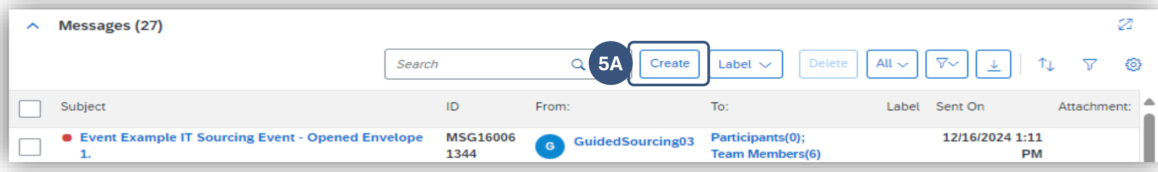
G. Before fully reviewing and evaluating all responses against each other, the Sourcing Project Owner should return to the Tasks section to mark the **Open Vendor Responses to Sourcing Event after Response Submission Deadline** task **Complete** before Posting the Preliminary Bid Tabulation to eVP. For more information on the tabulation process in eVP, please see the [Entering Bid Tabulations & Awards](#) job aid.

H. The first task in **Phase 06** of the **Tasks** section of the Sourcing Project is a required **To do** task to **Determine Vendor Responsiveness**. Once responsiveness is determined outside of the system, mark that task **Complete**.

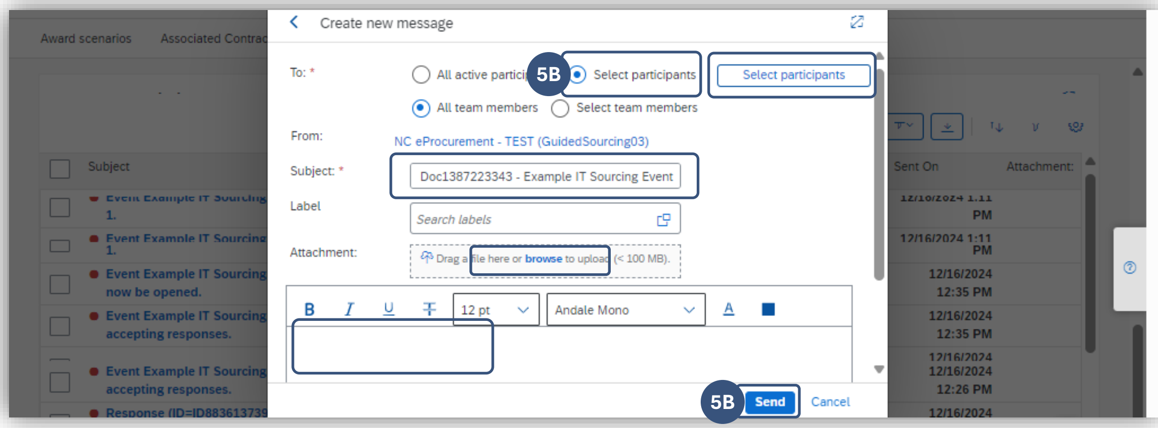
Seeking Clarification

5 While reviewing the vendor responses, it may be necessary to seek clarification with certain vendors. NCDIT has provided templates for these requests for clarification that are available in the NCDIT **Sourcing Library**. Sending the requests for clarification to applicable vendors will be handled via the Sourcing Event's **Messages** section.

A. If clarification is needed for a vendor's response, the Sourcing Project Owner should navigate to the Sourcing Event's **Messages** section and click the **Create** button at the top of the screen.



B. On the **Create new message** popup, select the recipients of the message. Unlike adding an Addendum where the audience is everyone, the Sourcing Project Owner is sending a specific request for clarification to a specific vendor. Click the radio button next to **Selected participants** and click **Select participants** to choose the specific vendor to which to send the request. Enter a more specific **Subject** and write an informative message in the body. Attach **a Request for Clarification form** (the templates for which can be found in the **Clarifications Folder** in the NCDIT Sourcing Library). Then click **Send**. The new message will display in the **Messages** section, and the Sourcing Project Owner will wait for a response from the selected vendor before making any more decisions.



The same steps should be taken via Event **Messages** to send a **Request a BAFO** to a vendor later in the process (**Phase 08**) if applicable. The only change being that the Sourcing Project Owner would obtain a different template from the **BAFO Folder** in the NCDIT Sourcing Library, as well as sending a draft to NCDIT for review via a task before sending the final version to the vendor.

Submit Exception Requests to NCDIT (if applicable)

6

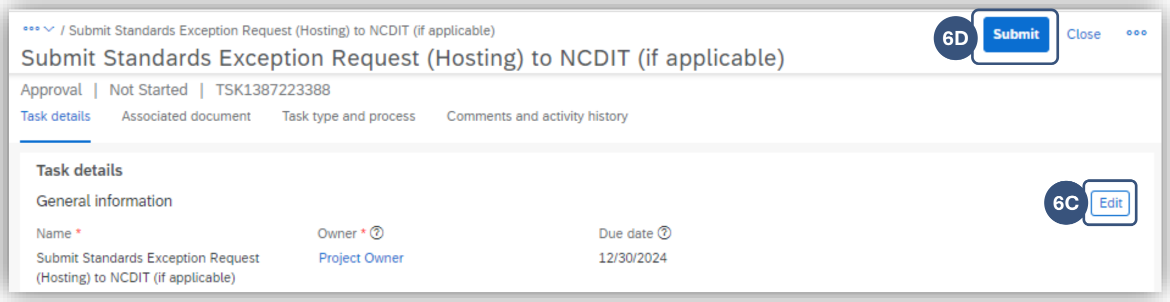
At times during the IT procurement process, it may be necessary to request an exception from NCDIT. Three types of exceptions can be requested at this point: **Standards Exception Request (Hosting)**, **Standards Exception Request (NCID)**, and **Security Exception Request**. **Procurement Exception Requests (Form A)** can be submitted during **Phase 04**. Standards and Security Requests can be submitted during **Phase 07**. If no exceptions are needed, please skip to next section.

A. From the **IT** section of the **Sourcing Library**, expand the **Exceptions Folder** and click on the Exception Request document that matches the type of exception being requested, and select **Download Draft** from the dropdown.

B. The Sourcing Project Owner works with Agency Business to complete the applicable Exception Request Form and uploads it to the appropriate Exception Folder in the **Events and other documents** section of the Sourcing Project by replacing the **Replace with...** document.

C. Navigate to the **Tasks** section and click on the appropriate **Submit XXX Exception Request to NCDIT (if applicable)** task and click **Edit** to change the **Due Date** from the default value of 14 days if necessary. Click **Save**.

D. Click **Submit** to send the document to NCDIT for approval.



E. When the approval task has been submitted, its status in the **Tasks** section will automatically update to **In Approval**. To monitor the process of the approval, click on the task. Look for any comments by a NCDIT review group in **Comments and activity history** section.

F. After NCDIT fully approves the Exception Request, the task will automatically update to **Approved** status and Sourcing Project Owners can proceed to the next task.

The Tasks for both the Standards Exception and Security Exception requests are sent initially to the **Agency IT Security** group for approval before moving to NCDIT. It is important to make sure there is at least one agency user in the **Agency IT Security** group before submitting that task. If at least one user is not auto populated in the **Agency IT Security group**, Sourcing Project Owners must manually add someone into that group in the **Team** section.

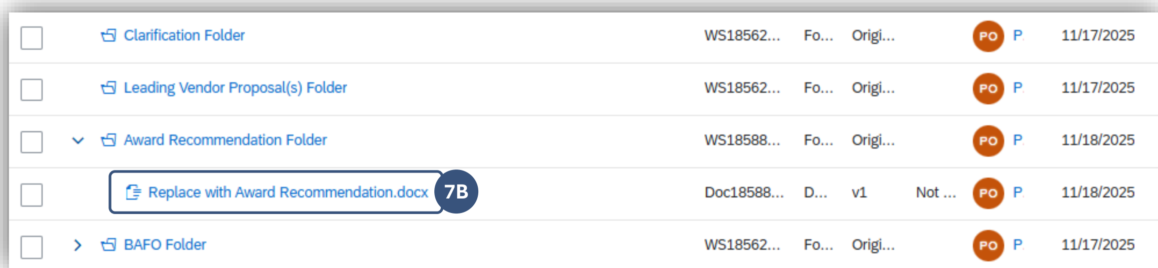
Submit Draft Award Recommendation and Leading Vendor Proposal(s) to NCDIT for Review

7 After posting the solicitation and conducting the Sourcing Event, the tasks in **Phases 05 – 07** in conjunction with the "IT Procurement Process Playbook" will outline the steps 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.

A. From the **IT** section of the **Sourcing Library**, expand the **Award Recommendation Folder** and click on the Award Recommendation template that matches the type of solicitation being awarded and select **Download Draft** from the dropdown.

B. Upload the completed form in the **Award Recommendation Folder** in the **Events and other documents** section of the Sourcing Project by replacing the **Replace with Award Recommendation** document along with uploading upload any additional documents NCDIT may need to review.

> More than one document can be uploaded at once, as can ZIP files. If a ZIP file is uploaded, the Sourcing Project Owner will have the option to **Unzip** or **Keep zipped** when they upload.



C. Navigate to the **Tasks** section and click on the **Submit Award Recommendation and Leading Vendor Proposal(s) to NCDIT for Review** task and click **Submit** to send the document(s) to NCDIT for approval. The **Due date** and **Approval flow** will be automatically set.

D. When the approval task has been submitted, its status in the Tasks section will automatically update to **In Approval**. To monitor the process of the approval, click on the task. Look for any comments by a NCDIT review group in **Comments and activity history** section.

E. After NCDIT fully approves the request, the task will automatically update to **Approved** status, and the Sourcing Project Owner can move on to **Phase 08** if necessary to handle any vendor negotiations, and if not to **Phase 09** to gain final approval.

Gain NCDIT Approval of Final Award Recommendation

8 Following any final negotiations per **Phase 08**, proceed to **Phase 09** to complete the **Gain Statewide IT Procurement Office and OSBM (if applicable) Approval of Final Award Recommendation** task.

A. If any information on the **Award Recommendation** document required an update following vendor negotiations, finalize the document and replace the draft version with the final version in the **Award Recommendation Folder** in the **Events and other documents** section.

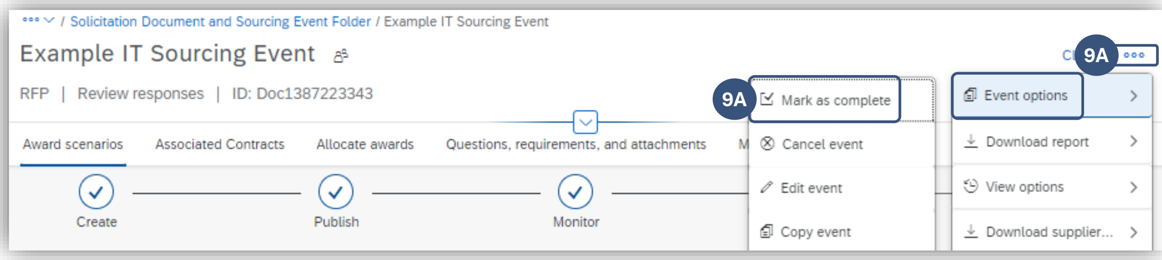
B. Navigate to the **Tasks** section and click on the **Gain Statewide IT Procurement Office and OSBM (if applicable) Approval of Final Award Recommendation** task and click **Submit** to send the document to NCDIT for approval. The **Due date** and **Approval flow** will be automatically set.

C. After NCDIT fully approves the Approval request, the task will automatically update to **Approved** status, and the Sourcing Project Owner can move on to **Phase 10** to handle the contract and close out the Sourcing Project.

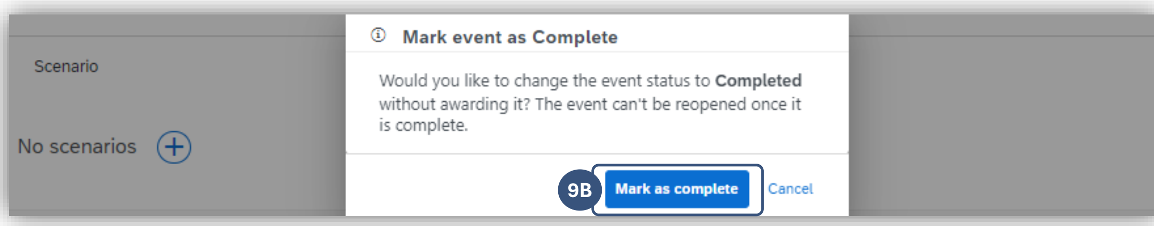
Completing the Sourcing Event and Project

9 Once the solicitation has been officially awarded per the process outlined by NCDIT, and the Sourcing Project Owner is certain that no more communication with the responding vendors will be necessary, the status of both the Sourcing Event and Sourcing Project should be marked **Complete** for clarification purposes.

A. Once an awarded vendor has been officially determined, return to the Sourcing Event to close it. Even if an award has been issued in eVP, the status will still read **Pending Selection** because the award was determined outside of the Sourcing Event. To manually close the Sourcing Event, click the three dots in the top right, hover over **Event options**, and select **Mark as complete** from the popup.



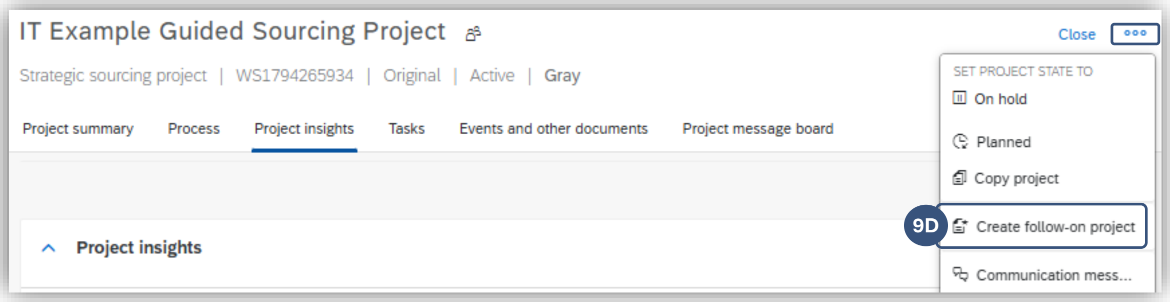
B. The **Mark event as Complete** warning will display reminding the Sourcing Project Owner that completed Sourcing Events cannot be reopened. This is okay because the Sourcing Event can still be accessed for important historical information. Click **Mark as complete**.



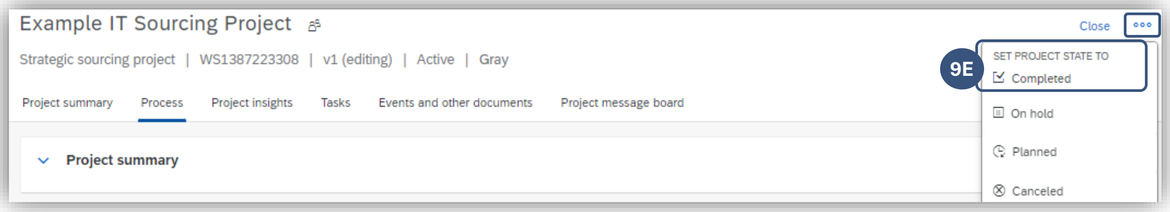
C. The Sourcing Event status will update to **Completed**. Navigate back to the Sourcing Project to mark that as **Completed**, too.

All required tasks including the two required **To do** tasks in **Phase 10 – Execute Contract** and **Create Contract Workspace for Each Awarded Vendor –** must be marked **Complete** before the Sourcing Project Owner can mark the overall Sourcing Project **Completed**.

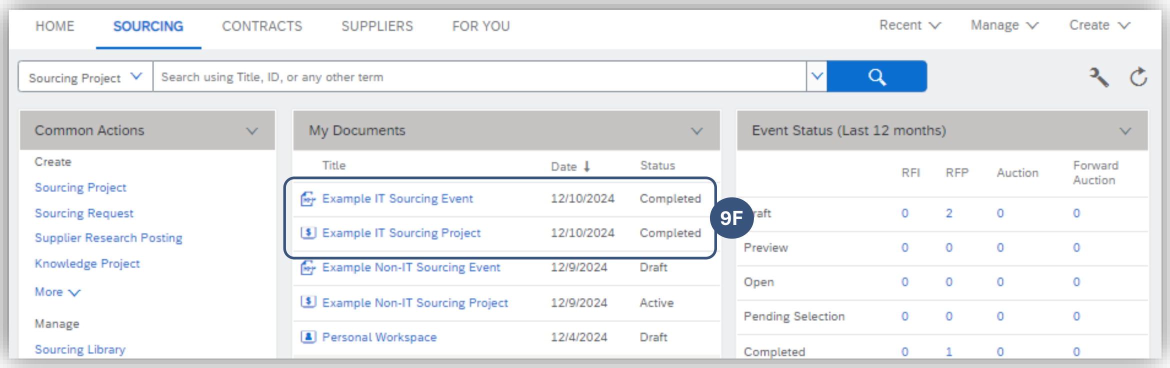
D. The final required task will be to **Create Contract Workspace for each Awarded Vendor** from the completed Sourcing Project. For more information on this process, please see the [Creating a Contract Workspace from a Sourcing Project Job Aid](#).



E. Once all required tasks are marked **Complete**, click the three dots in the top right of the Sourcing Project and select **SET PROJECT STATE TO Completed** from the dropdown, then confirm on the next page.



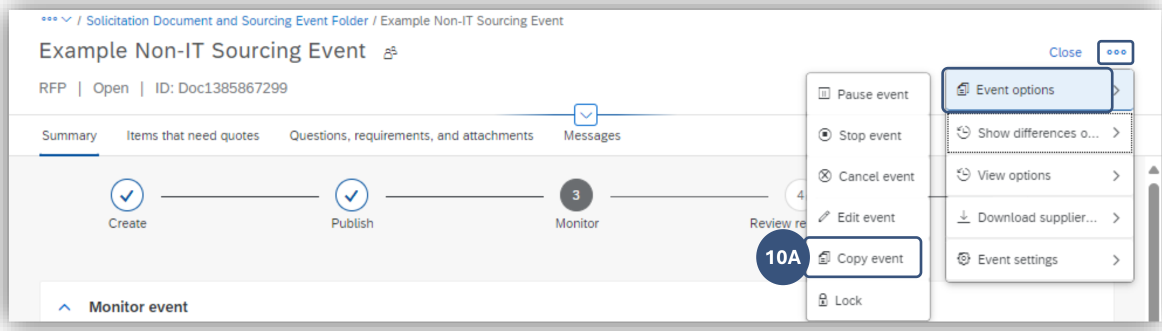
F. The status of both the Sourcing Project and Sourcing Event will now reflect **Completed** and will display as such in the **My Documents** portal on the **Sourcing** tab.



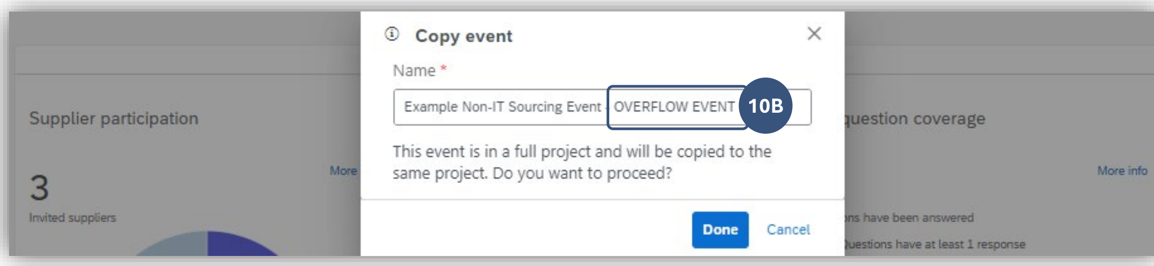
Creating an Overflow Event

10 Ariba Sourcing Events can accept a maximum of 100 supplier responses, and although reaching that threshold is extremely rare for solicitations created by state of North Carolina users, a plan is in place if an event is nearing that threshold. The Sourcing Project Owner will begin to see alerts within their Sourcing Event and may receive an additional communication from the NC eProcurement team that their event is nearing 100 suppliers. At this point the Sourcing Project Owner and the NC eProcurement team will monitor the number of responses as the **Due date** approaches and if it seems possible that over 100 suppliers will respond, they will work together to create an Overflow Event in the same Sourcing Project to allow more than 100 suppliers to respond to the solicitation.

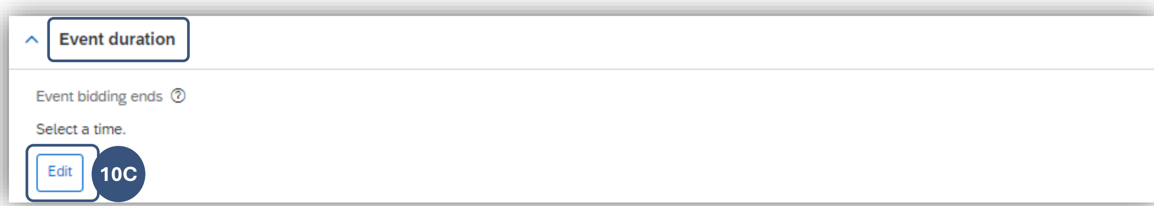
A. From the original Sourcing Event approaching 100 supplier responses, click on the three dots in the top right, hover over **Event options**, and select **Copy event** from the popup.



B. In the subsequent **Copy event** popup, enter a **Name** for the new Event. It is advised that the Sourcing Project Owner include "OVERFLOW EVENT" at the end of the title, then click **Done**.



C. The Sourcing Project Owner will be taken to a **Draft** version of the new Event. Click the **Edit** button in the **Event duration** section to set the **Due date** and time to match the end time on the original Event.



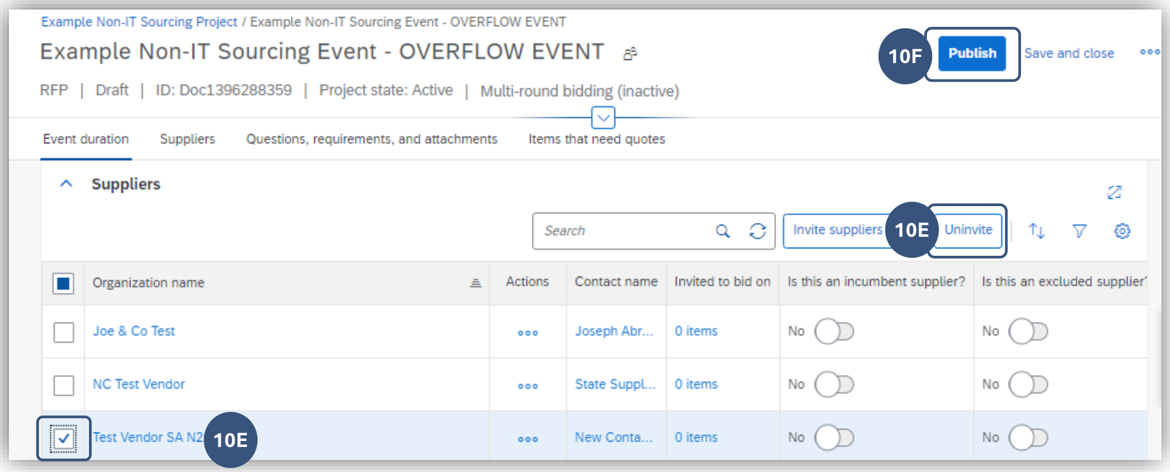
If it is within three business days of the **Due date**, the Overflow Event will NOT post publicly on eVP (which is the desired result). If the Overflow Event is being created further in advance, the NC eProcurement team will remove it from the public site as soon as its posted.

D. Navigate to the **Questions, requirements, and attachments** (Content) section and ensure that all content and documents copied over from the original Event matches up as expected.

E. In the **Suppliers** section, the Sourcing Project Owner will see that ALL suppliers from the original Event will automatically appear. Unlike on the original Event, there will be no indication which suppliers are in what status on the new Event at this time. With the help of the NC eProcurement team, the Sourcing Project Owner will manually remove all suppliers who are in a **Participated** status on the original Event before publishing the Overflow Event. To do this, check the box next to an identified supplier and click **Uninvite**.

Multiple suppliers can be checked at once when the **Uninvite** button is clicked. A vendor participation report can be exported from the original Event to help identify which suppliers should be removed. Click the three dots in the top right of the Event then click **Download supplier information** in the dropdown and select **Download supplier invitation**. Before clicking **Export** on the subsequent screen, click the down-arrow and uncheck the box next to **Address**.

F. After all information on the Overflow Event is reviewed for accuracy, the Sourcing Project Owner can click **Publish** to finalize the Overflow Event.



- The Overflow Event will exist at the top of the **Events and other documents** section but can be moved into the **Solicitation Document and Sourcing Event** folder if desired.
- The NC eProcurement team will monitor any new suppliers who gain access to the original Event after the Overflow Event is published and manually add those suppliers to the Overflow Event.
- Only suppliers on the Overflow Event will have access to respond in that Event.
- Suppliers in **Participated** status on the original Event DO NOT have to submit a response on the Overflow Event and will have the ability to edit their current responses until the **Due date** is reached on the original Event.
- The Sourcing Project Owner can choose to send a communication to all or certain vendors on the original Event to explain the need for the Overflow Event via Event Messages.
- When both Events close, the Sourcing Project Owner will need to review the responses received in both Events.