

NC eProcurement

Managing and Awarding a Sourcing Event (IT)

STATE DEPARTMENT STATE BRANCH
LOCAL GOVERNMENT CITY COUNTY
COMMUNITY COLLEGE PUBLIC SCHOOLS
NORTH CAROLINA ePROCUREMENT PURCHASING
ONLINE SHOPPING STATEWIDE TERM CONTRACTS
ELECTRONIC VENDOR PORTAL HUB CERTIFIED VENDOR
QUOTE PUNCHOUT CATALOG
PURCHASE ORDER
SOURCING
BIDDING
BUY

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 on the Team tab 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.

I. Identifying Participating Vendors and Vendor Questions

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'** tab 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 the Event **'Messages'** page.

1. On the **'Suppliers'** tab, Sourcing Project Owners will see a list of vendors who have accessed the Sourcing Event. If the **'Status'** column says **"Participated"**, it indicates that the vendor has submitted a response to the solicitation. Sourcing Project Owners will not be able to view the contents of the vendor's response until after the Sourcing Event's **'Due Date'** and the Sourcing Project Owner has opened the envelopes. If the **'Status'** column says **"Intends to Participate"**, it indicates the vendor has accepted Ariba's terms to respond but has not yet completed their response. If the **'Status'** column is blank, it indicates the vendor clicked on the **'Respond to Posting'** link but has not yet accepted Ariba's terms to see the details of the solicitation.

Overview

Content

Suppliers

Invited Participants

Organization Name

↑

▶ Mari Test Account 1

▼

▶ NC Test Vendor

Response Team

Locked

Status

No

Yes

No

Intends to Participate

No

Yes

No

Participated

Lock / Unlock

Resend Invitation Email

Compare

Compose Message

The 'Status' column on the 'Suppliers' tab will indicate whether or not a vendor has submitted a response.

2. 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 the Sourcing Event **'Messages'** page. A notification will appear on the Sourcing Project Owner's home page when an Event Message is received, or a user can check the **'Messages'** tab on the Sourcing Event at any time to see these messages. Click on the **'Subject'** of the new message to read it.

Overview

Messages

Log

Award

Actions

Filter by Label:

All

Messages

From the Event ‘Messages’ tab, click on the ‘Subject’ of the new message to view it.

Messages

	Id	From	Contact Name	To	Labels	Subject
<input type="radio"/>	MSG25803241	NC Test Vendor	State Supplier	Participants (0) Team (3)	(no value)	IFB # 292197227 – Questions
<input type="radio"/>	MSG25803238	Mari Test Account 1	Mari 1	Participants (0) Team (3)	(no value)	IFB # 292197227 – Questions
<input type="radio"/>	MSG25803120	NC eProcurement - TEST	SourcingTrainer10	Participants (2) Team (0)	(no value)	NC eProcurement - TEST has ir
<input type="radio"/>	MSG25803119	NC eProcurement - TEST	SourcingTrainer10	Participants (0) Team (2)	(no value)	Event Example Sourcing Event

View

Reply

Delete

Associate Labels

Compose Message

Download all attachments

NC eProcurement

Managing and Awarding a Sourcing Event (IT)

STATE DEPARTMENT STATE BRANCH
LOCAL GOVERNMENT CITY COUNTY
COMMUNITY COLLEGE PUBLIC SCHOOL
NORTH CAROLINA ePROCUREMENT PURCHASE
ONLINE SHOPPING STATEWIDE TERM CONTRACT
ELECTRONIC VENDOR PORTAL HUB CERTIFIED V
QUOTE PUNCHOUT CATALOG
PURCHASE ORDER
SOURCING
BIDDING
BUY

3. The **'View Message'** page will display, and the user can see the vendor's questions.

View Message [OK] [Cancel] [Reply]

Id: MSG25803241
From: NC Test Vendor (State Supplier)
Sent: 10/13/2021 11:25 AM
To: Project Team; NC eProcurement - TEST(SourcingTrainer10);
Subject: IFB # 292197227 - Questions
Viewed By: NC eProcurement - TEST (SourcingTrainer10) ⓘ

Will we be required to perform services after traditional business hours and on weekend?

The vendor's message will be at the bottom of the 'View Message' page.

4. If the Sourcing Project Owner would like to generate an export of only the vendor questions within the Event **'Messages'** tab, they can click the **'Table Options Menu'** icon (stacked boxes) below the **'Actions'** button, then select **'Messages From Participants'** and **'Show Details'** from the dropdown. Finally, they can select **'Export all Rows'**, and an Excel download of all vendor questions will be created.

Messages

Id	Reply Sent	Sent Date	From	Contact Name	To	Labels	Subject
MSG25803241	No	10/13/2021 11:25 AM	NC Test Vendor	State Supplier	Participants (0) Team (3)	(no value)	IFB # 292197227 - Quest
MSG25803238	No	10/13/2021 11:21 AM	Mari Test Account 1	Mari 1	Participants (0) Team (3)	(no value)	IFB # 292197227 - Quest

View Reply Delete Associate Labels Compose Message Download all attachments

To generate an export of only vendor questions, click the 'Table Options Menu' (stacked boxes) and select 'Messages From Participants' and 'Show Details' before selecting 'Export all Rows' from the dropdown menu. Note the contents of the messages now appear, not just the 'Subject.'

Will we be required to perform services after traditional business hours and on weekend?

When will this Contract start?

Show ...

- All Messages
- Messages From Team Members
- Messages From Participants
- Messages From System
- Messages Not From System
- Messages Sent
- Messages Sent To Participants
- Messages Sent To Team Members
- Export to Excel
- Export all Rows
- Export Current Page
- Show/Hide Rows
- Show Details

II. Developing an Addendum

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.

1. 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. To access the Sourcing Event from the **'Documents'** tab, click on the Sourcing Event and select **'Monitor'** from the dropdown, then navigate to the Sourcing Event **'Content'** tab. Click the **'Actions'** button in the top right and select **'Edit'** from the dropdown menu.

Doc533802338 - Example IT Sourcing Event

Overview Content Suppliers

All Content Filter

Name

Totals

1 Welcome to the State of North Carolina's Sourcing Tool

Welcome to the State of North Carolina's Sourcing Tool, which is intended to streamline the solicitation process for both the State and vendors.

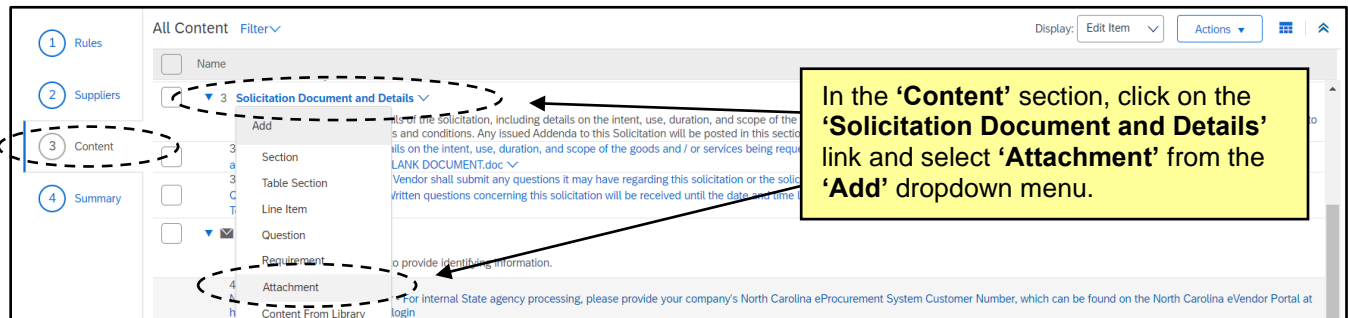
Display View As Participant NC Test Vendor (State Supplier) Document Edit Open Envelope

Click the 'Actions' button (obscured by the dropdown menu) in the top right of the 'Content' tab, and then click 'Edit'.

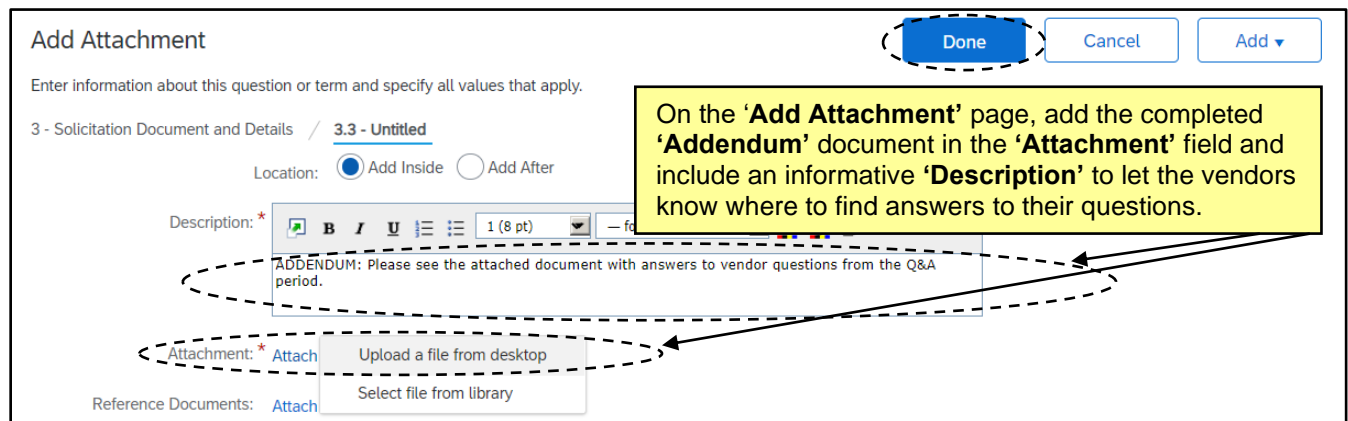
NC eProcurement

Managing and Awarding a Sourcing Event (IT)

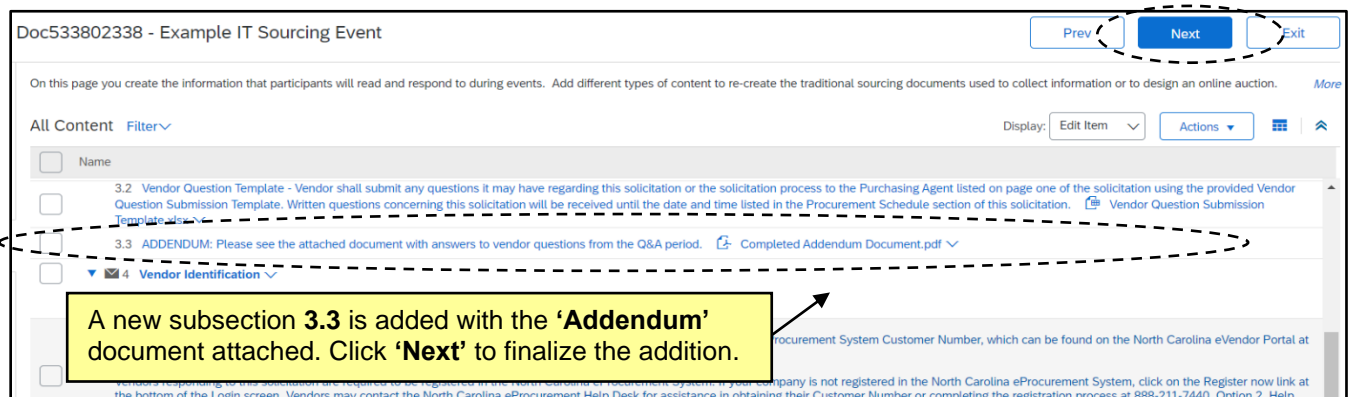
- Click the **'Content'** link on the left side of the screen, click on the **'Solicitation Document and Details'** link next to **3**, and select **'Attachment'** from the **'Add'** dropdown menu.



- The **'Add Attachment'** page will display, and the attachment will automatically be assigned to subsection **3.3**. Attach the completed **'Addendum'** document in the **'Attachment'** field. Add a **'Description'** to let the vendors know this is where they can find the answers to their questions and click **'Done'**.



- The newly added subsection **3.3** will now display with the **'Addendum'** document attached for the vendors to review. Click **'Next'**.



NC eProcurement

Managing and Awarding a Sourcing Event (IT)

- The **'Pending Changes'** will display in the **'Summary'** section where the Sourcing Project Owner can review the change before finalizing it by clicking **'Update'** in the top right.

Note: Although uncommon, certain edits to vendor response sections will cause any existing responses to be discarded. In these instances, an additional warning message will display and a red "Yes" be visible in the **'Responses Removed'** column. It may be helpful to remind vendors to verify their responses, especially vendors that were in **'Submitted'** status when the change was made.

The screenshot shows the 'Summary' section of a Sourcing Event titled 'Doc533802338 - Example IT Sourcing Event'. The left sidebar has four items: Rules, Suppliers, Content, and Summary. The 'Summary' item is selected and circled. The main content area shows 'Content Changes' with a '1 Change pending' status. Below this is a table with columns: Published Version, Draft Version, Diff Type, Responses Removed, and Details. A row shows a change to '3.3 ADDENDUM: Please see the attached document with answers to vendor questions from the Q&A period.' with a link to 'Completed Addendum Document.pdf'. Below the table is a 'Participant Changes' section with columns 'Contact Name' and 'Item Name'. A yellow callout box points to the 'Update' button in the top right and says: 'Review the **'Pending Changes'** and if correct, click **'Update'**.'

- A final review page will display giving the user four options for communicating with vendors. ALWAYS select one of the first two options to either **'Keep and email'** or **'Keep, but do not email'**. If **'Keep and email'** is selected, add a brief message in the box to let the vendors know that an **'Addendum'** has been added. Click **'Update Event'** to officially attach the **'Addendum,'** and the user will be given the option to return to the Event or go the Project.

Note: To update the **'Description'** on a Sourcing Event, navigate to the **'Summary'** section of the Event and click the white **'Actions'** button, then select **'Edit Overview'** from the dropdown.

The screenshot shows the 'Summary' section of a Sourcing Event titled 'Doc533802338 - Example IT Sourcing Event'. The left sidebar has four items: Rules, Suppliers, Content, and Summary. The 'Summary' item is selected. The main content area shows a section titled 'Choose an option for participants' responses:'. There are three radio button options: 'Keep and email - Keep participants' existing responses and send an email to participants, notifying them that they should review their previously submitted responses to ensure that they are still accurate.', 'Keep, but do not email - Keep existing responses, but do not send any notification to participants.', and 'Do not keep, and email - Discard existing responses, and send an email to participants, notifying them that their responses have been discarded.' The first option is selected. Below the options is a text box for 'Include an additional message in the notification (optional)'. The text box contains the message: 'Please see the Addendum added to section 3 of the Event to address previous questions. Thank you.' Below the text box is a 'Max. 2000 characters' label. At the bottom is an 'Update Event' button. A yellow callout box points to the 'Update Event' button and says: 'Choose the **'Keep and email'** option, add a message to let the participants know an **'Addendum'** was added, and click **'Update Event.'**

- 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.

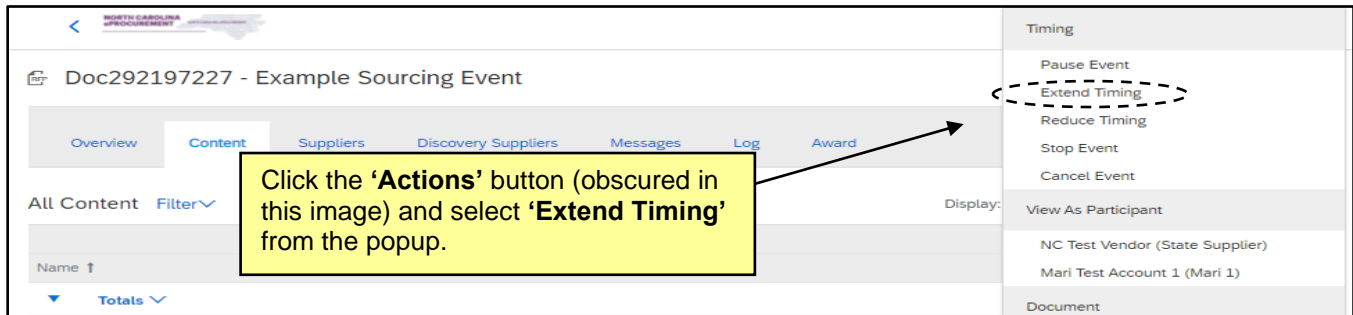
NC eProcurement

Managing and Awarding a Sourcing Event (IT)

III. Editing the Timing on a Published Sourcing Event

Sourcing Project Owners have the ability to change the Due Date and Time on a published Sourcing Event if necessary. Although it is not advised to reduce the amount of time vendors have to respond, there might be some scenarios where the timing needs to be extended.

1. From the Sourcing Event, click on the **'Actions'** button in the top right. A popup menu will display and the **'Timing'** options will be at the top. Click on **'Extend Timing'**.



2. On the subsequent **'Extend Time'** page, note the current start and end times and then set a new, later end time. The new end time can be extended by switching the radio button to **'Fixed time'** and choosing the new date and time via the pickers, then clicking **'OK'**.

Extend Time

You have chosen to extend, reduce, or reopen the event. Enter the length of time in minutes, days or hours. If you chose to extend or reopen the event, the time you enter is [More](#)

Bidding start time: 10/12/2021 8:15 PM

Timing remaining: 13 days, 22 hours, 29 minutes

Current state end time: 10/27/2021 2:00 PM

Set length or specific time: ☐ Duration: ☐ End time explicitly specified

☒ Fixed time: 10/29/2021 2:00 PM

OK Cancel

3. The **'Opening Date'** timing will be automatically updated in Public eVP and the HUB Opportunities page, and will also be reflected 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.

NC eProcurement

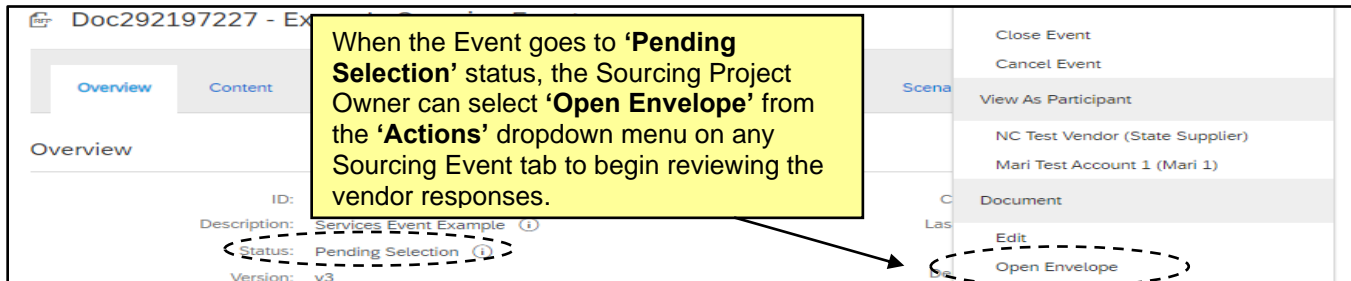
Managing and Awarding a Sourcing Event (IT)

STATE DEPARTMENT STATE BRANCH
LOCAL GOVERNMENT CITY COUNTY
COMMUNITY COLLEGE PUBLIC SCHOOL
NORTH CAROLINA ePROCUREMENT PURCHASE
ONLINE SHOPPING STATEWIDE TERM CONTRACT
ELECTRONIC VENDOR PORTAL HUB CERTIFIED V
QUOTE PUNCHOUT CATALOG
PURCHASE ORDER
SOURCING
BIDDING
BUY

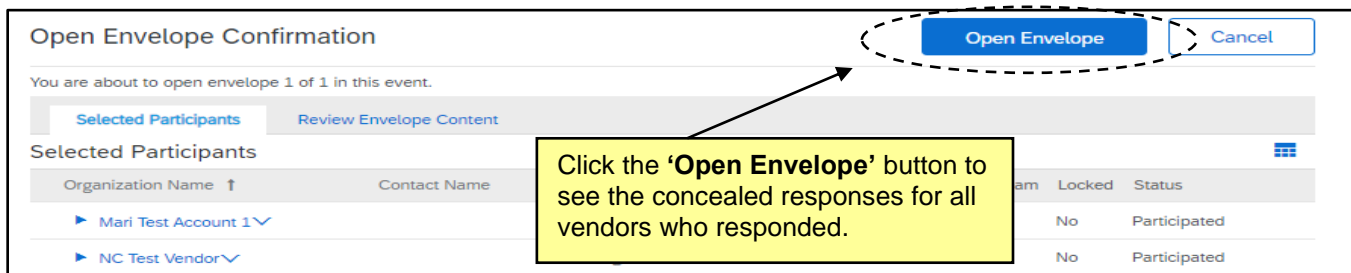
IV. Opening the Envelopes and Reviewing Vendor Responses

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 **'Envelope'** to review the responses.

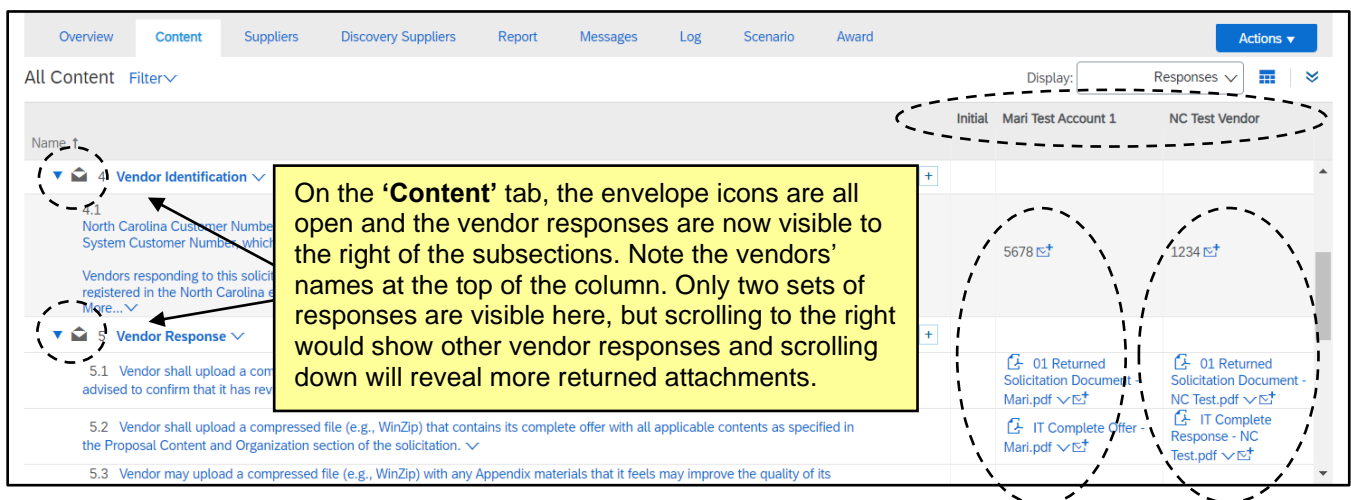
1. When the bidding is closed, the Sourcing Event will go to a **'Pending Selection'** status. At that time, the Sourcing Project Owner can click the **'Actions'** button in the top right (obscured by the popup menu in the image below) and select **'Open Envelope'** to begin reviewing the bids.



2. The **'Open Envelope Confirmation'** page will display a list of the participating vendors. Click **'Open Envelope'** to compare the responses.



3. Navigate to the **'Content'** tab if not already there and scroll down to see the responses revealed to the right of Sections 4 and 5. The vendor's 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.



NC eProcurement

Managing and Awarding a Sourcing Event (IT)

- Before fully reviewing and evaluating all responses against each other, the Sourcing Project Owner should take the information gathered and **'Post Preliminary Bid Tabulation to eVP'** per the **'Tasks'** tab.

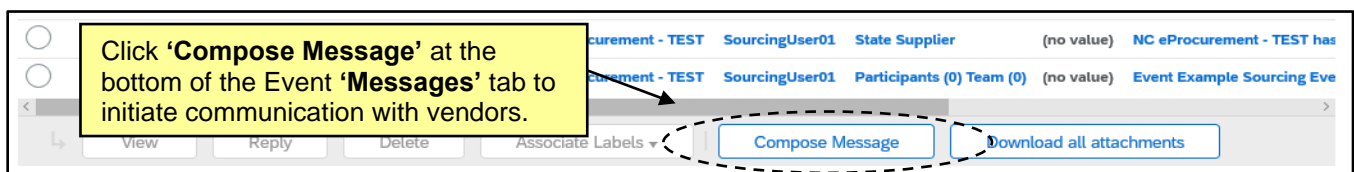
Notes:

- There is an option in the **'Actions'** dropdown menu to **'Download All Supplier Attachments'** where Sourcing Project team members can mass-select vendors and sections and download everything all at once. It is important to check the box next to **'Title'** under **'Selected Items'** before clicking **'Download Attachments'** on this page.
- The **'Report'** tab on the Sourcing Event has a button called **'Download Reports'**. Selecting **'Question and Terms Report'** may help in providing all vendor response information in Excel format. If **'Line Items'** were included in the Sourcing Event **'Content'**, the **'Bid Comparison Report'** option provides a helpful Excel export of that information.
- For more information on opening subsequent envelopes in Sourcing Events with multiple envelopes, please see the ['Multi-Envelope Events'](#) job aid.

V. Seeking Clarification

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 **'Event Messages'**.

- If clarification is needed for a vendor's response, the Sourcing Project Owner should navigate to the Sourcing Event's **'Messages'** tab and click the **'Compose Message'** button at the bottom of the screen.



- On the **'Compose New Message'** page, 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'**, 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 after clicking the **'Shortcut to NCDIT Sourcing Library Folder'** link on the **'Documents'** tab of the Project). Then click **'Select Participants'** to narrow down the recipient group.

Compose New Message

From: NC eProcurement - TEST (SourcingUser01)

To: ☐ All Active Participants ☒ **Selected Participants** ☐ All Team Members ☐ Selected Team Members

Subject: Seeking Clarification on Bid

Labels: (no value) select

Attachments: ☒ Request for Clarification.docx

Please fill out the attached Request for Clarification document and return with specific answers. Thanks.

Select the radio button next to **'Selected Participants'** to limit the recipients of the message. Once the **'Subject'** and message have been updated and the attachment has been added, click the **'Select Participants'** button.

NC eProcurement

Managing and Awarding a Sourcing Event (IT)

- The **'Select Participant For Message'** popup will display, and the Sourcing Project Owner can select to which vendor the message should be sent. The Sourcing Project Owner can click **'OK'**, and then click **'Send'** back on the **'Compose New Message'** page. The new message will display on the **'Messages'** tab, and the Sourcing Project Owner will wait for a response from the selected vendor before making any more decisions.

Note: 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.

Select Participant For Message

Invited Participants

	Organization Name ↑	Contact Name	Invited by	Incumbent	Response Team	Locked	Status
<input checked="" type="checkbox"/>	NC Test Vendor		SourcingUser01	No	Yes	No	Participated

OK Cancel

VI. Submit Exception Requests to NCDIT (if applicable)

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

- From the **'Documents'** tab, click on the **'Shortcut to NCDIT Sourcing Library Folder'** link and select **'Open'** from the dropdown. Click the blue triangle to the left of the **'Exceptions Folder'**, click on the Exception Request document that matches the type of exception being requested, and select **'Download Draft'** from the dropdown.
- The Sourcing Project Owner works with Agency Business to complete the applicable Exception Request Form and uploads it to the appropriate Exception Folder on the **'Documents'** tab by replacing the **'Replace with...'** document.
- Navigate to the **'Tasks'** tab and click on the appropriate **'Submit XXX Exception Request to NCDIT (if applicable)'** task. Select **'View Task Details'**.
- On the subsequent **'Approval Task'** page, specify a due date from the date picker (we recommend a minimum of five business days) and click **'Submit'** to send the document to NCDIT for review.

1. ☒ Procurement Exception Folder (Read Only)

2. Specify Due Date

3. Provide an initial message and click Submit or Mark Cancelled

Additional Attachments...

4. Submit Mark Cancelled

Add a due date from the date picker, include a message if necessary, and click **'Submit'**.

NC eProcurement

Managing and Awarding a Sourcing Event (IT)

- When the approval 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 review group on the **'Task History'** tab (visible upon scrolling down the **'Approval Task'** page).

Note: 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 on the **'Team'** tab.

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

VII. 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" 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.

- From the **'Documents'** tab, navigate to the **'Sourcing Library'** and download the template in the **'Award Recommendation Folder'**. Populate the template and save a local copy before navigating back to the **'Documents'** tab. Replace the placeholder document in that **'Award Recommendation Folder'** with the completed version.
- Click the **'Leading Vendor Proposal(s) Folder'** and select **'Document'** beneath **'Upload'** in the popup.
- 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.
- 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.
- On the subsequent **'Review Task'** page, specify a due date from the date picker (we recommend a minimum of five business days), include a message to NCDIT indicating the leading vendor(s) on which they should focus their review, and then click **'Submit'** to send the task to NCDIT for review.

1. ☐ Award Recommendation Folder (Read Only)

2. Specify Due Date

3. Provide an initial message and click Submit

4. Submit

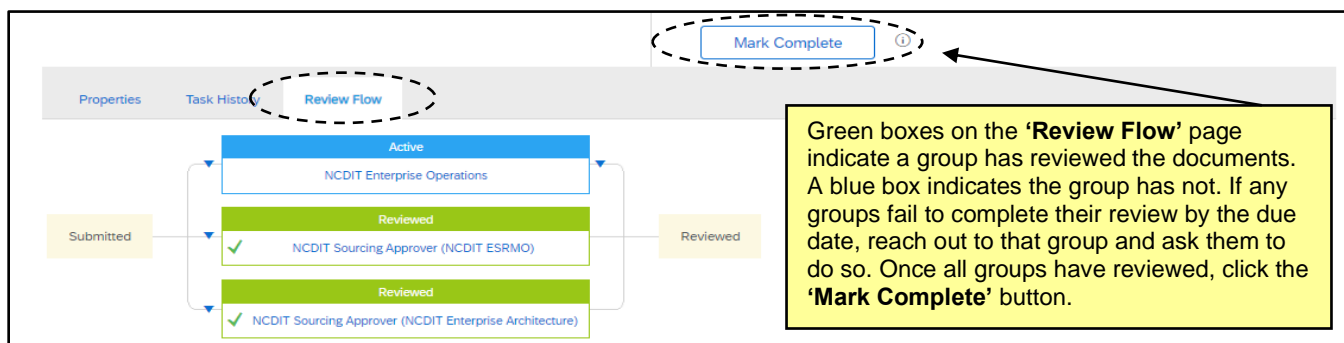
Set a due date, provide a message to NCDIT with the suggested leading vendor(s), and click 'Submit'.

NC eProcurement

Managing and Awarding a Sourcing Event (IT)

- When the review 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 can contact those reviewers and ask them to do so at their earliest convenience. When all reviewers have completed their review, click the **'Mark Complete'** button to indicate the task is done.



VIII. Gain NCDIT Approval of Final Award Recommendation

Following any final negotiations per **'Phase 08'**, 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.

- 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'** on the **'Documents'** tab.
- 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.
- 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.
- After NCDIT reviews and approves the final **'Award Recommendation'** document, the task will automatically update to **'Approved'** status and a checkmark will appear to the left.

▼ ✓ 09 - REVIEW AND APPROVE AWARD RECOMMENDATIONS ▼		Project Owner	Complete	01/18/2023
✓ Gain NCDIT Approval of Final Award Recommendation * ▼	Award Recommendation Folder ▼	classroomtraining48	Approved	01/18/2023
► ⇌ 10 - EXECUTE CONTRACT ▼		Project Owner	Not Started	

NC eProcurement

Managing and Awarding a Sourcing Event (IT)

- On the next page, click the dropdown next to **'Project State'** and select **'Completed'**, then click **'OK'**.

Edit Example IT Sourcing Project

Make necessary changes to the general attributes for this project by editing the necessary fields on the **Overview** tab. On the **Template Questions** tab you can make changes to the answers given for [More](#)

Overview **Template Questions**

Name: * Example IT Sourcing Project ⓘ

Project State: Active ⓘ

Version: Active

Start Date: Completed

Project Status: Gray

Click the dropdown arrow next to **'Project State'** and select **'Completed'**.

- 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. The next step, as indicated by the final task on the **'Tasks'** tab, 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.

HOME

SOURCING

CONTRACTS

SUPPLIERS

Recent

Manage

Create

Sourcing Project

Search using Title, ID, or any other term

Common Actions

Create

Sourcing Project

Sourcing Request

Supplier Research Posting

Knowledge Project

More

Manage

Sourcing Library

My Documents

Title	Date	Status
Example IT Sourcing Event	10/20/2022	Completed
Example IT Sourcing Project	10/20/2022	Completed
Example Sourcing Services Project	10/20/2022	Active
Janitorial Services	10/4/2022	Draft
Janitorial Services Project	10/4/2022	Active

Event Status (Last 12 months)

RFI	RFP	Auction	Forward Auction

Both the 'Sourcing Project' and 'Sourcing Event' display as 'Completed' in the user's 'My Documents' portlet.

X. Creating an Overflow Event

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.

1. From the original Sourcing Event approaching 100 supplier responses, click on the **'Actions'** button in the top right and select **'Copy'** from the dropdown.
2. At the top of the subsequent screen, provide a **'Title'** for the Overflow Event. It is advised that the Sourcing Project Owner include "OVERFLOW EVENT" at the end of the title.

3. The radio button next to the **'Solicitation Document and Sourcing Event Folder'** will default. Click **'OK'** to add the Overflow Event to that folder.

4. The Sourcing Project Owner will be taken to a **'Draft'** version of the new Event. To edit that Event, click the **'Actions'** button and select **'Edit'** from the dropdown. Set the **'Due date'** to match the end time on the original Event.

Note: 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 it's posted.

NC eProcurement

Managing and Awarding a Sourcing Event (IT)

STATE DEPARTMENT STATE BRANCH
LOCAL GOVERNMENT CITY COUNTY
COMMUNITY COLLEGE PUBLIC SCHOOL
NORTH CAROLINA ePROCUREMENT PURCHASE
ONLINE SHOPPING STATEWIDE TERM CONTRACT
ELECTRONIC VENDOR PORTAL HUB CERTIFIED V
QUOTE PUNCHOUT CATALOG
PURCHASE ORDER
SOURCING
BIDDING
BUY

5. Navigate to the **'Content (3)'** section and ensure that all content and documents copied over from the original Event matches up as expected.
6. In the **'Suppliers (2)'** 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 **'Remove'**.

NOTES:

- Multiple suppliers can be checked at once when the **'Remove'** button is clicked.
- A report can be exported from the **'Suppliers'** tab of the original Event on the **'Status'** of all suppliers on the original Event to help identify which suppliers should be removed.

NC eProcurement

Managing and Awarding a Sourcing Event (IT)

- After all information on the Overflow Event is reviewed for accuracy, the Sourcing Project Owner can proceed to the **'Summary (4)'** section and click **'Publish'** to finalize the Overflow Event.

Event Doc1172151714 - Example Sourcing Event - OVERFLOW EVENT

Prev Publish Exit

Review and revise your event. Your edits have been already saved. When you finish, you can launch the event or leave it [More](#)

Overview

ID: Doc1172151714

Description: Example Sourcing Event ⓘ

Editors:

Event Type: RFP

Commodity: 761115 - General building and office cleaning and maintenance services 761115

Last Modified: 07/03/2024

Regions: (no value)

Departments: ADMNP DOA Purchasing

Currency: US Dollar

Creation Date: 07/03/2024

Access Control: (No additional restrictions) ⓘ

1 Rules

2 Suppliers

3 Content

4 Summary

Review all parts of the Overflow Event for accuracy then click 'Publish'.

NOTES:

- 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.