NC eProcurement

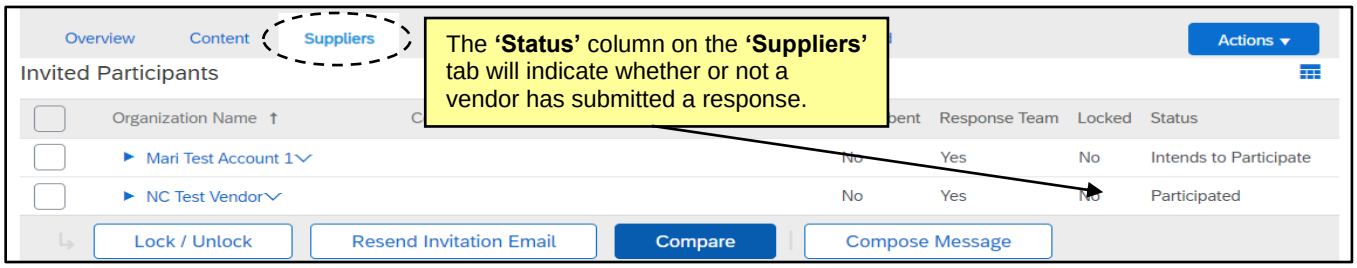
Managing and Awarding a Sourcing Event (IT)

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.

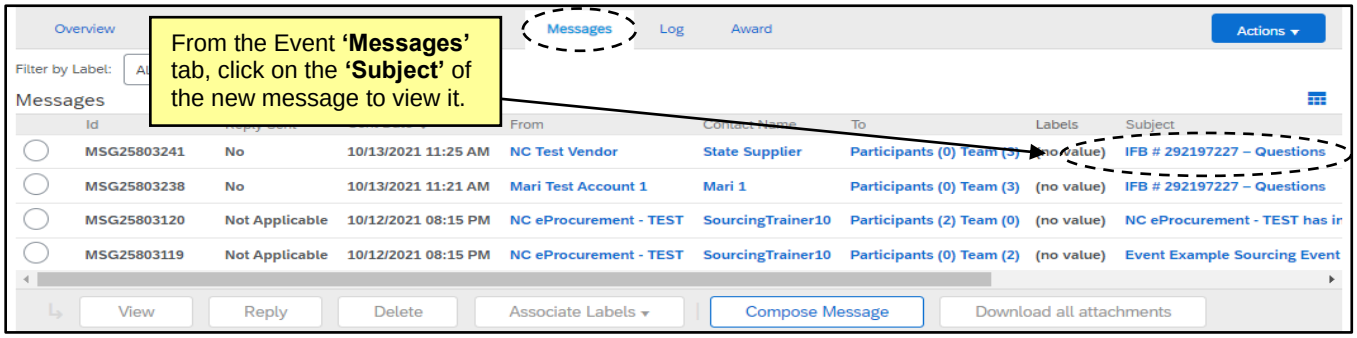
I. Identifying Participating Vendors and Vendor Questions

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.

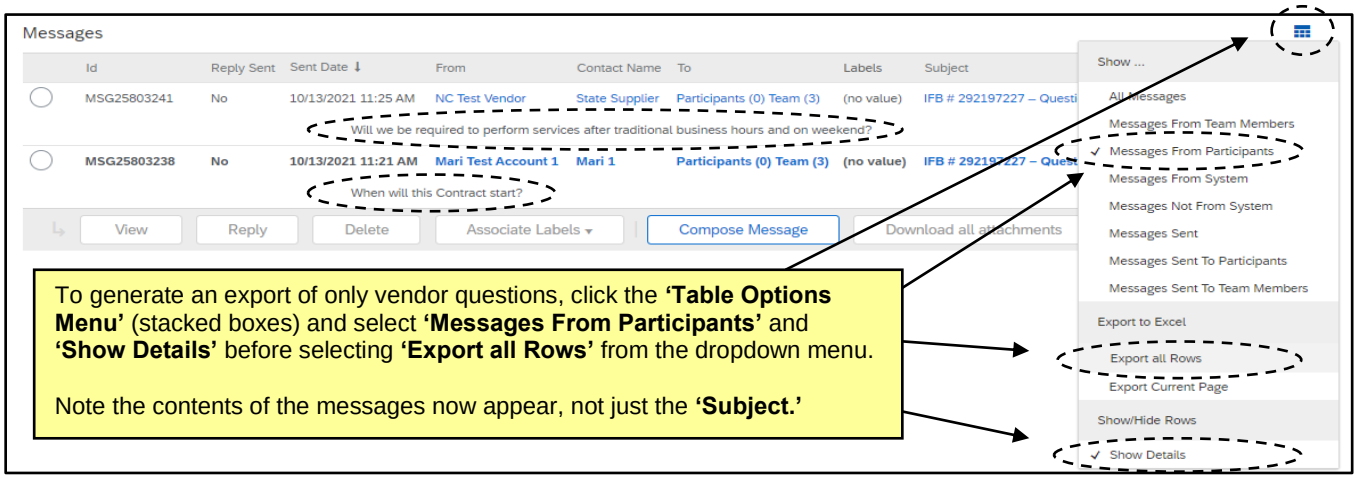


2. If a vendor has any questions during the Q&A period, they are instructed to submit them to the contact listed on the first page of the solicitation document via email or through the Sourcing Event **'Messages'** page. A notification will appear on the Sourcing Project Owner's home page when an Event 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.



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

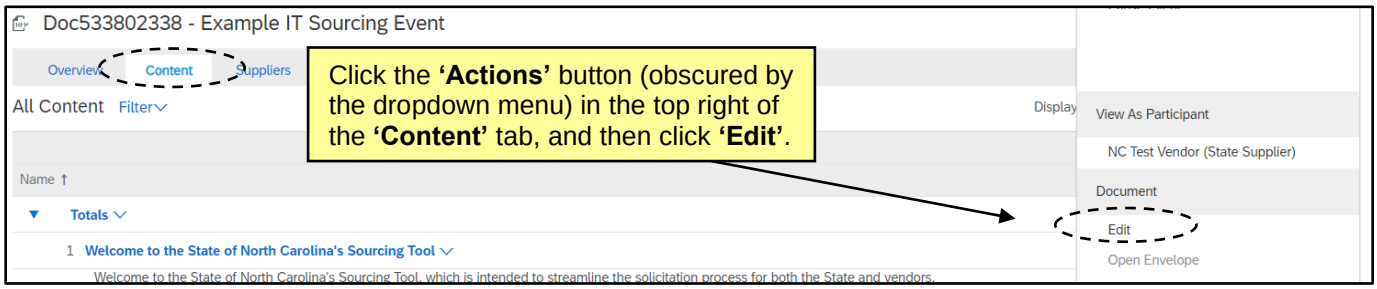
4. If the Sourcing Project Owner would like to generate an export of only the vendor questions within the Event **'Messages'** tab, they can click the **'Table Options Menu'** icon (stacked boxes) below the **'Actions'** button, then select **'Messages From Participants'** and **'Show Details'** from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



II. Developing an Addendum

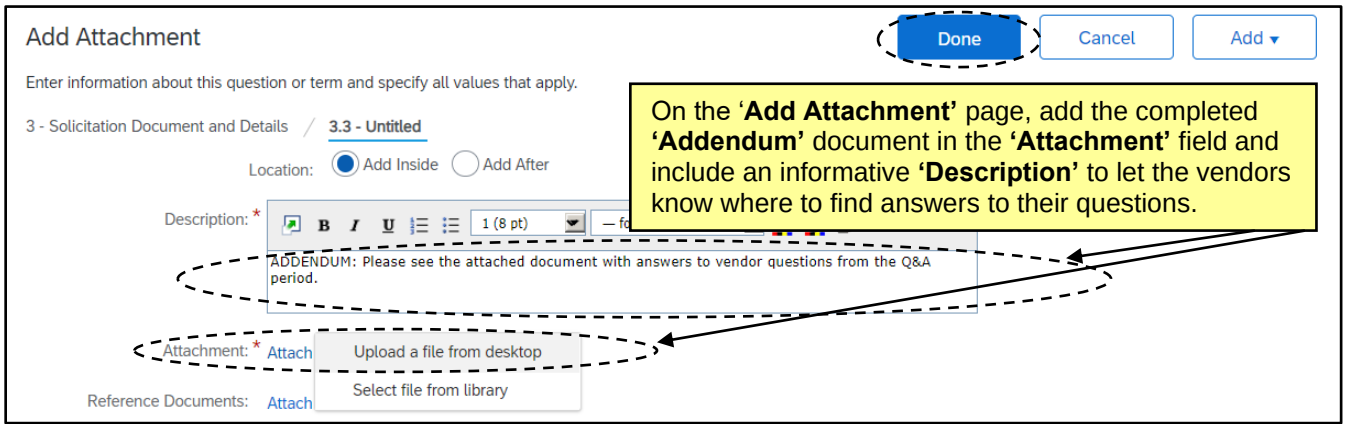
Sourcing Project Owners can provide answers to vendor questions – or make any other necessary updates to the Sourcing Event – by posting an **'Addendum'** in the Sourcing Event before the **'Due Date'** of the Sourcing Event.

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.

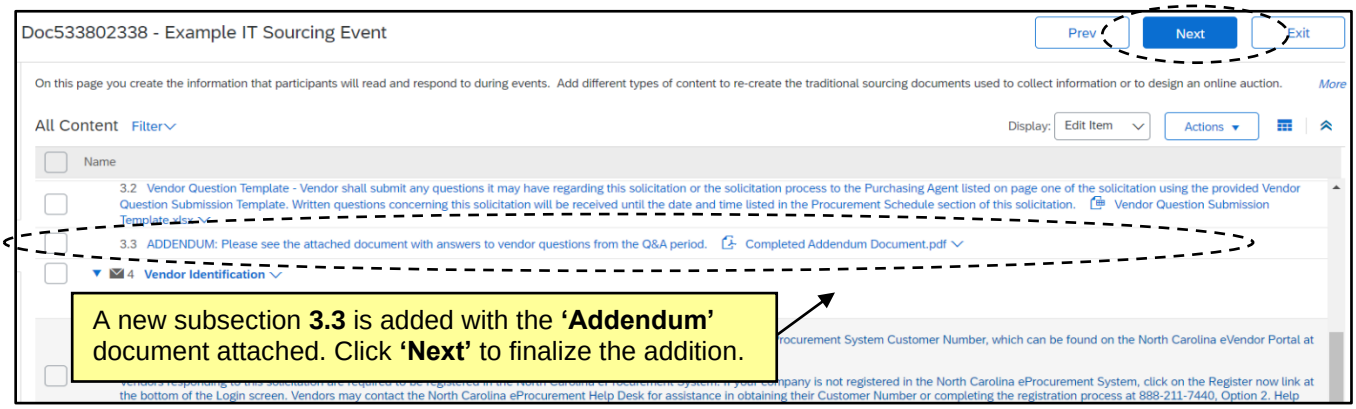


2. Click the **'Content'** link on the left side of the screen, click on the **'Solicitation Document and Details'** link next to **3,** and select **'Attachment'** from the **'Add'** dropdown menu.

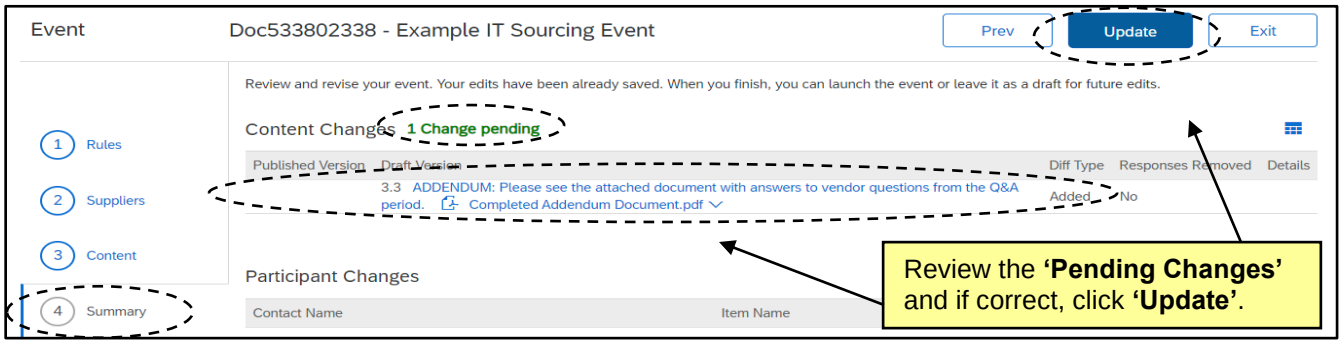
3. The **'Add Attachment'** page will display, and the attachment will automatically be assigned to subsection **3.3.** Attach the completed **'Addendum'** document in the **'Attachment'** field. Add a **'Description'** to let the vendors know this is where they can find the answers to their questions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



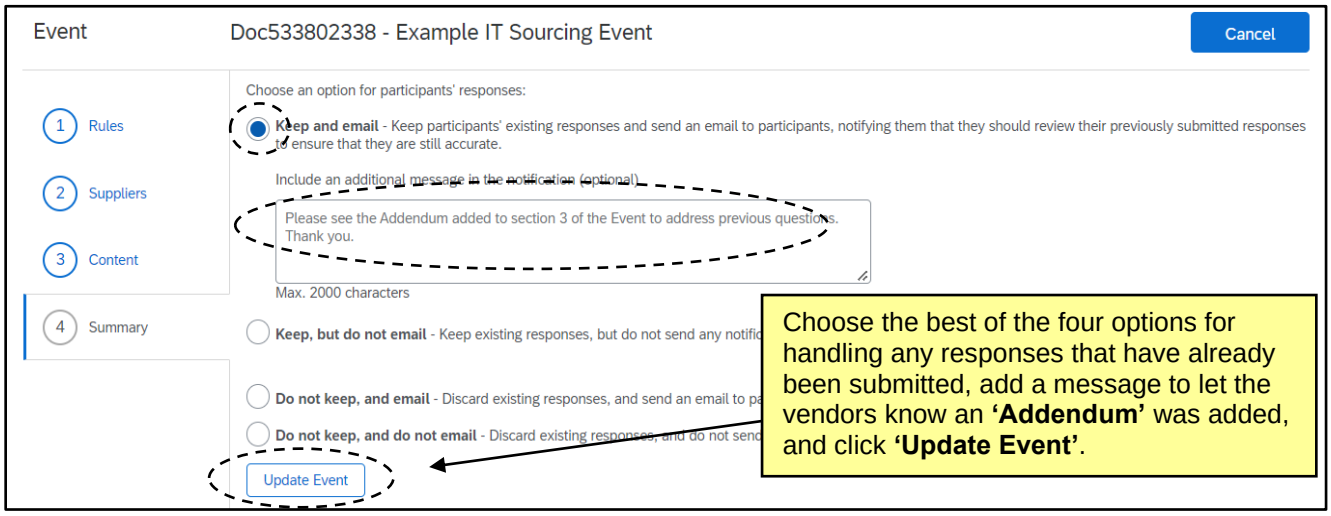
4. The newly added subsection **3.3** will now display with the **'Addendum'** document attached for the vendors to review. Click **'Next'.**



5. 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.



6. A final review page will display giving the Sourcing Project Owner four options for handling any responses that may have already been submitted by vendors**. 'Keep and email'**, **'Keep, but do not email'**, **'Do not keep, and email'**, and **'Do not keep, and do not email'**. Select the option that makes the most sense given the situation per guidance from NCDIT and 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 Sourcing Project Owner will be given the option to return to the Sourcing Event or go the Sourcing Project.

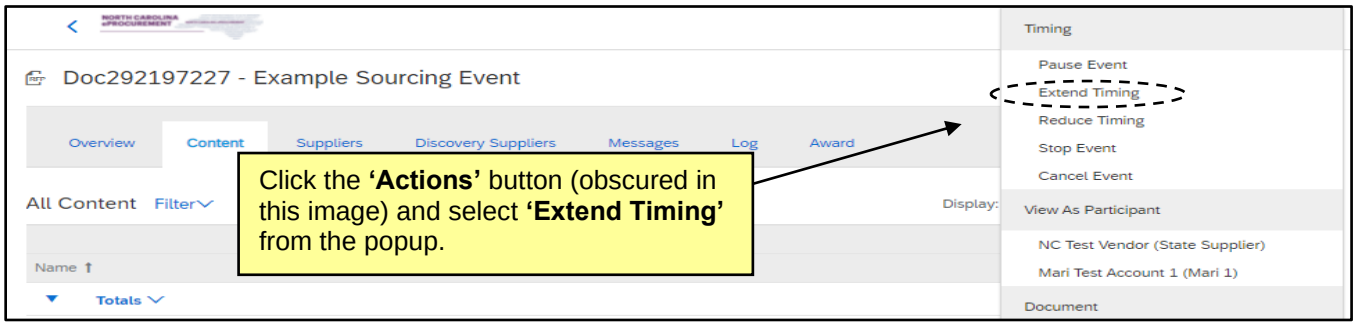


7. The addendum and any new attachments from Section 3 of the Sourcing Event will be automatically posted to Public eVP and the HUB Opportunities page, and they can be found on the **'Addenda'** and **'Documents'** tabs of the solicitation in the Agency App. If there were any issues with the public posting, 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.

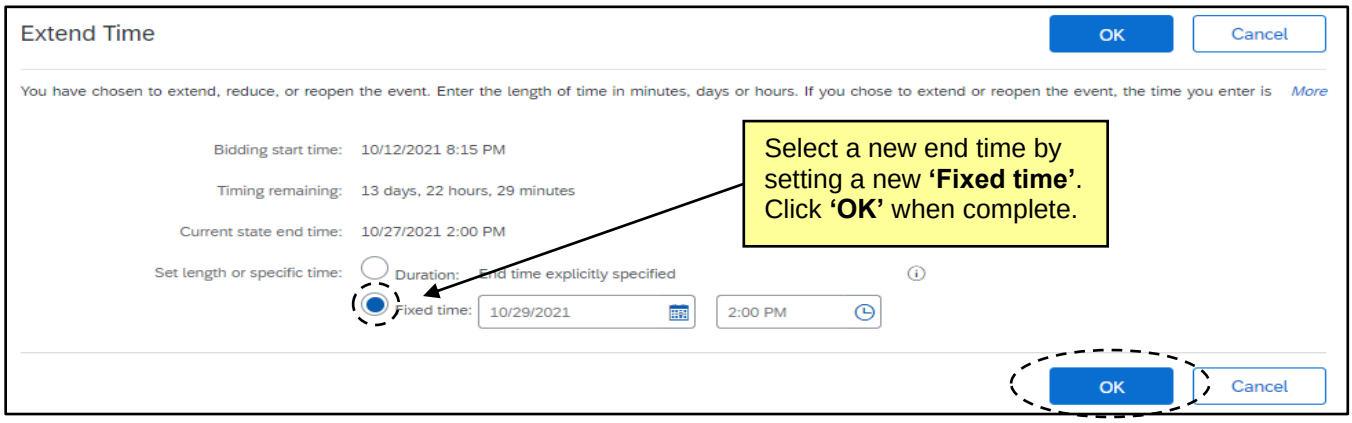
III. Editing the Timing on a Published Sourcing Event

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'**.

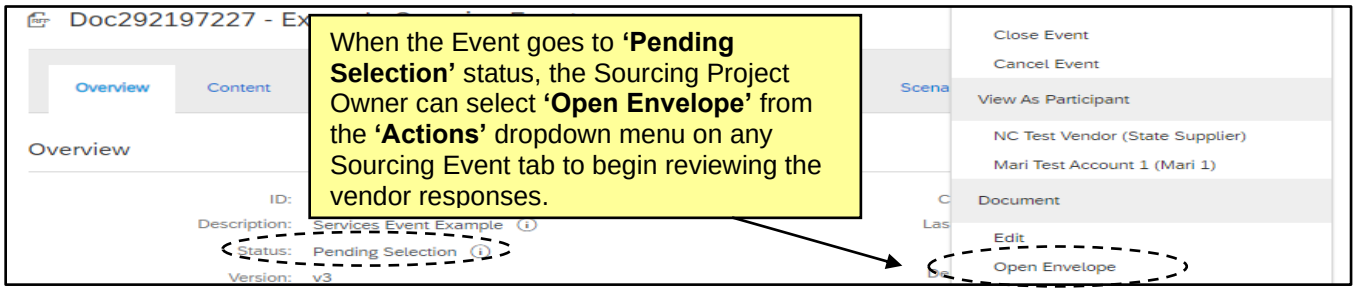


3. The **'Opening Date'** timing will be automatically updated in Public eVP and the HUB Opportunities page, and will also be reflected on the on the **'General'** and **'Addenda'** tabs of the solicitation in the Agency App. If there were any issues with the public posting, the user will receive an 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.

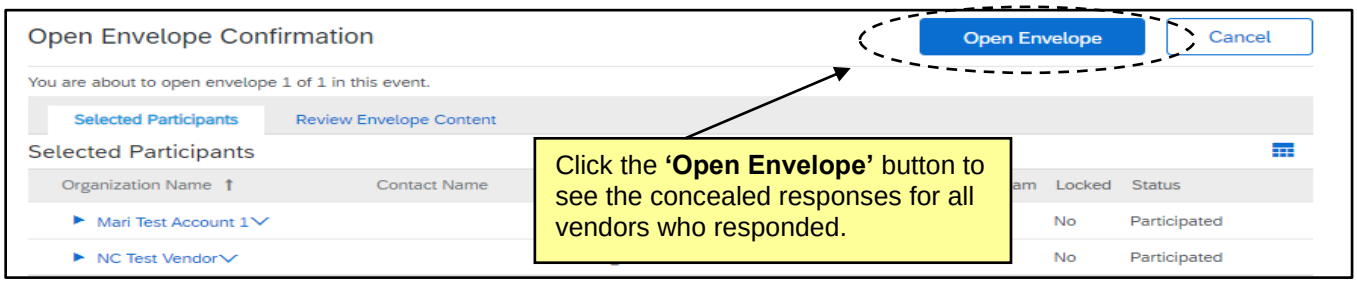
IV. Opening the Envelopes and Reviewing Vendor Responses

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.

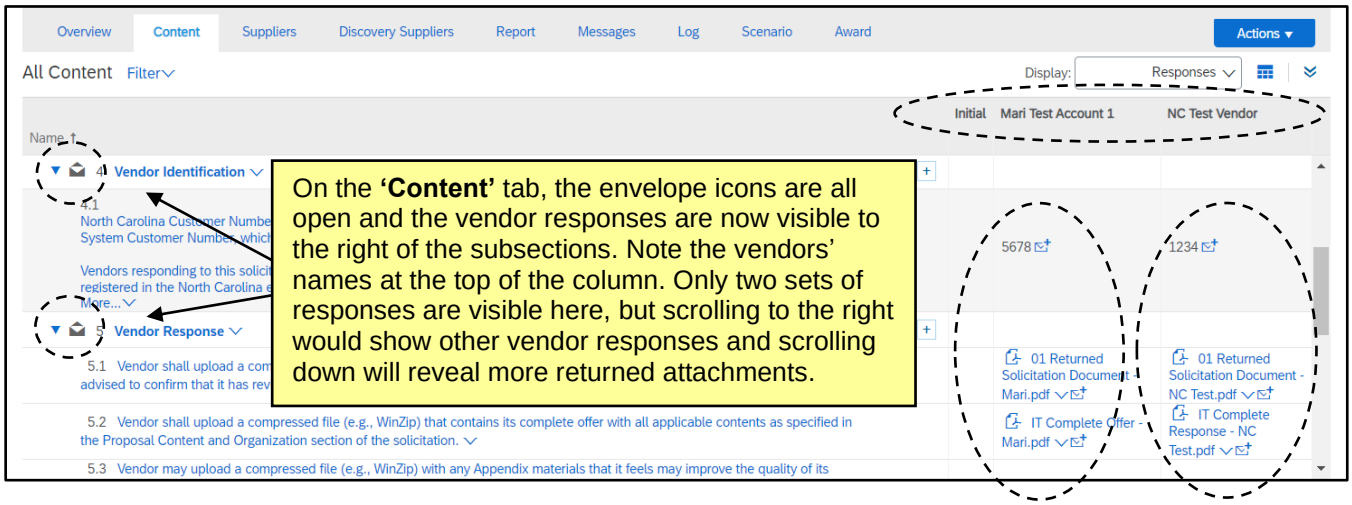
1. When the bidding is closed, the Sourcing Event will go to a **'Pending Selection'** status. At that time, the Sourcing Project Owner can click the **'Actions'** button in the top right (obscured by the popup menu in the image below) and select **'Open Envelope'** to begin to review the bids.



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.



4. 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.

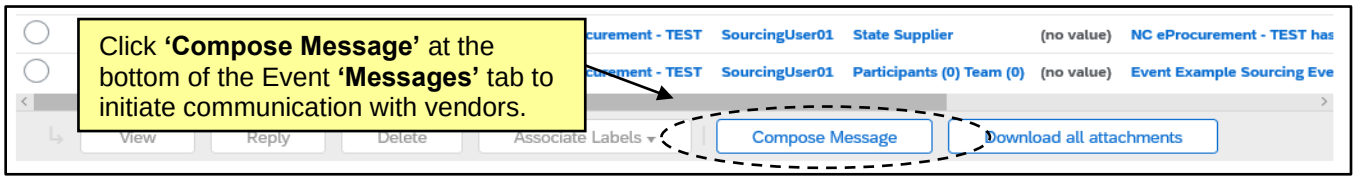
Notes:

- 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.

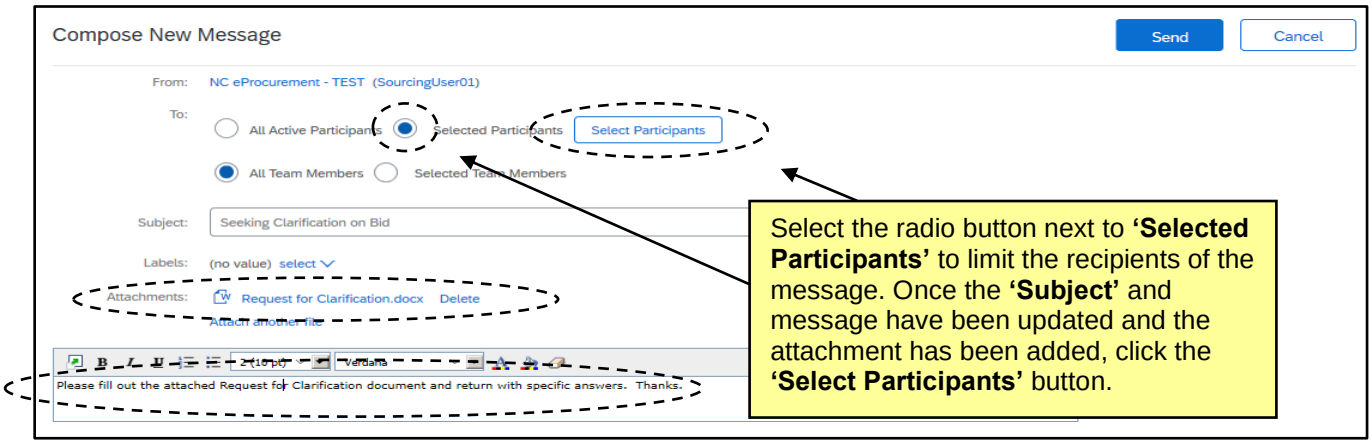
V. Seeking Clarification

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'**.

1. 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.

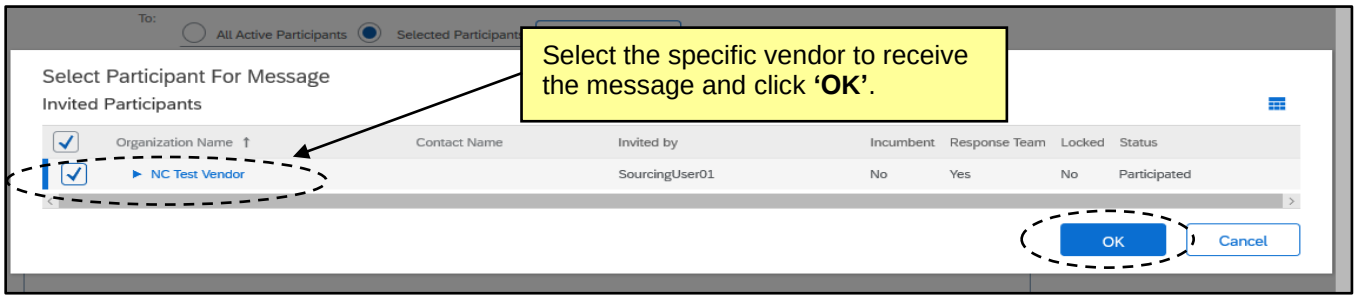


2. On the **'Compose New Message'** page, select the recipients of the message. Unlike adding an **'Addendum'** where the audience is everyone, the Sourcing Project Owner is sending a specific request for clarification to a specific vendor. Click the radio button next to **'Selected Participants'**, 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.



3. 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.



VI. Submit Exception Requests to NCDIT (if applicable)

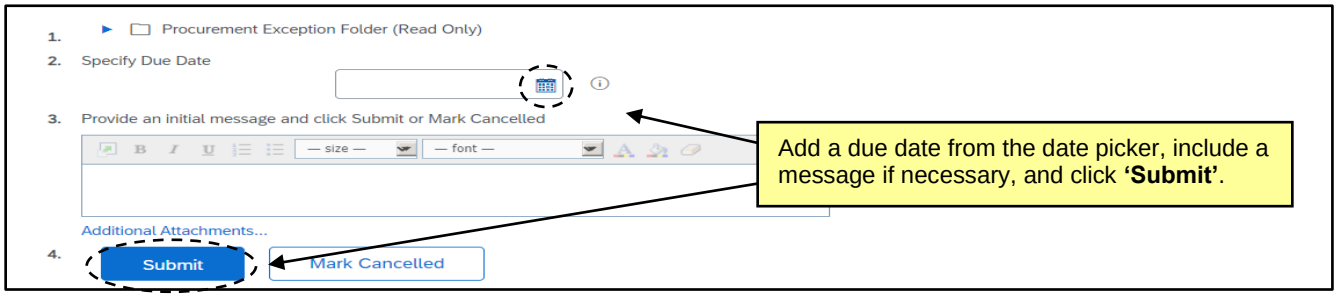
At times during the IT procurement process, it may be necessary to request an exception from NCDIT. Three types of exceptions can be requested: **'Procurement Exception (Form A)'**, **'Standards Exception (Form B)'**, and **'Security Exception (Form C)'**. **'Procurement Exception Requests (Form A)'** 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.

1. 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.

2. 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.

3. Navigate to the **'Tasks'** tab and click on the appropriate **'Submit XXX Exception Request to NCDIT (if applicable'** task. Select **'View Task Details'**.

4. 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.



5. 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.

6. 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.

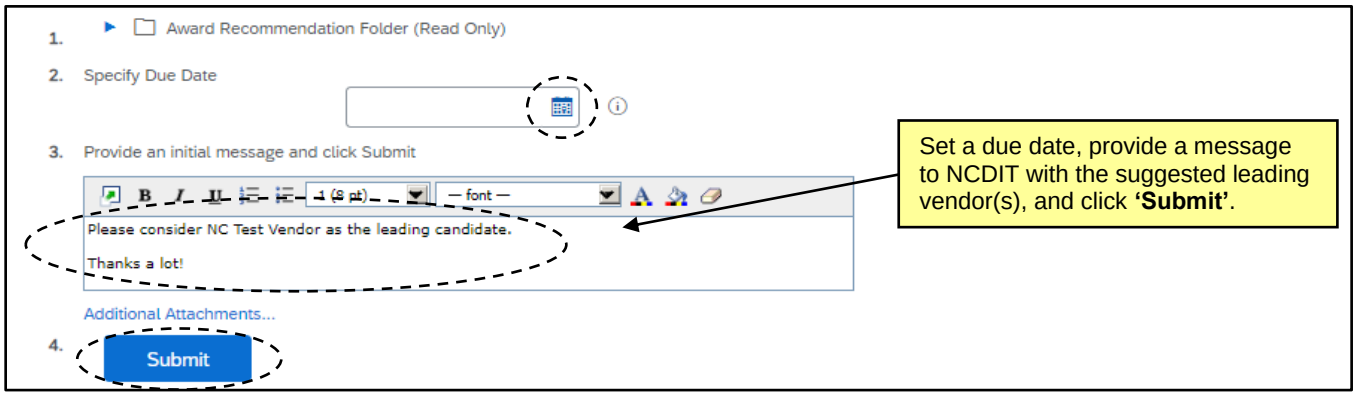
1. From the **'Documents'** tab, navigate to the **'Sourcing Library'** and download the template in the **'Award Recommendation Folder'**. Populate the template and save a local copy before navigating back to the **'Documents'** tab. Replace the placeholder document in that **'Award Recommendation Folder'** with the completed version.

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.

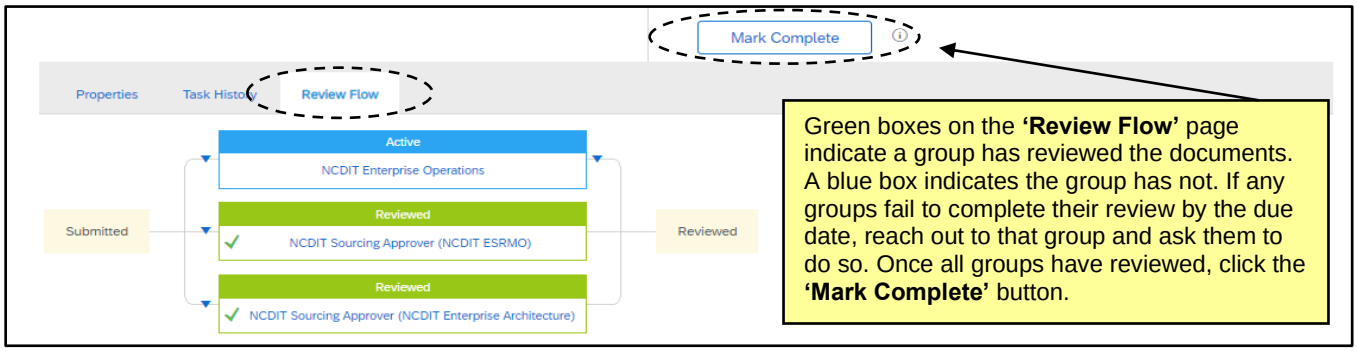
4. Navigate to the **'Tasks'** tab and click on the **'Submit Award Recommendation and Leading Vendor Proposal(s) to NCDIT for Review'** task. Select **'View Task Details'** from the dropdown.

5. On the subsequent **'Review Task'** page, specify a due date from the date picker (we recommend a minimum of five business days), 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.



6. 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

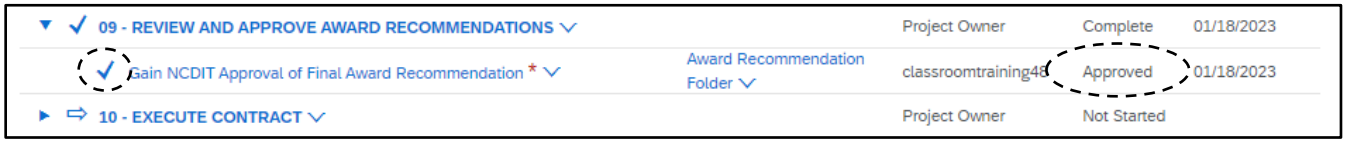
Following any final negotiations per **'Phase 08'**, proceed to **'Phase 09'** to complete the **'Gain NCDIT Approval of Final Award Recommendation'** task. This is the final required **'Approval Task'** in the IT procurement process.

1. 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.

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, the task will automatically update to **'Approved'** status and a checkmark will appear to the left.

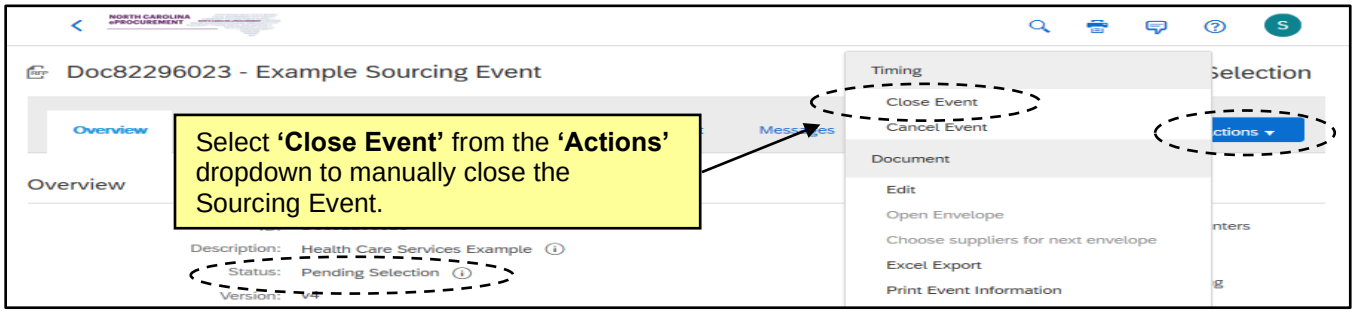


IX. Completing the Sourcing Event and Project

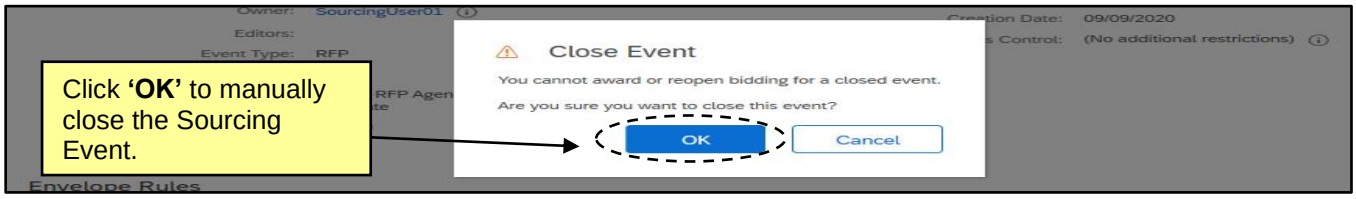
Once the solicitation has been officially awarded per the process outlined by NCDIT, and the Sourcing Project Owner is certain that no more communication with the responding vendors will be necessary, the status of both the Sourcing Event and Sourcing Project should be marked **'Complete'** for clarification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

Note: Per the tasks in **'Phase 10',** it's important that the Sourcing Project Owner email a fully executed copy of the awarded contract to the Statewide IT Procurement Office contact that was involved in the Sourcing Project.

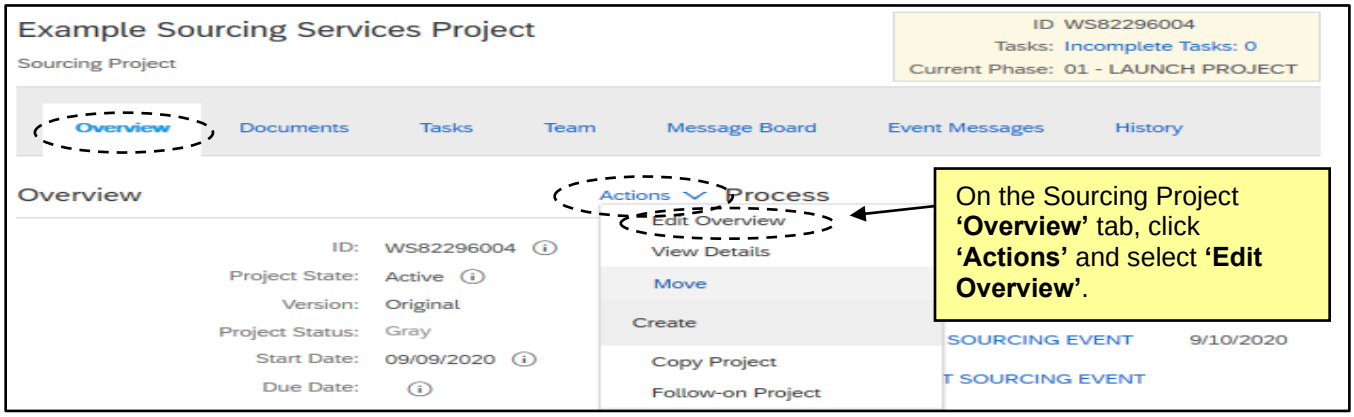
1. Once the solicitation has been officially awarded and notification has been posted to eVP, return to the Sourcing Event to close it. Even though an award has been issued, the status will still read **'Pending Selection'** because the award was determined outside of the Sourcing Event. To manually close the Sourcing Event, click the **'Actions'** button in the top right and select **'Close Event'**.



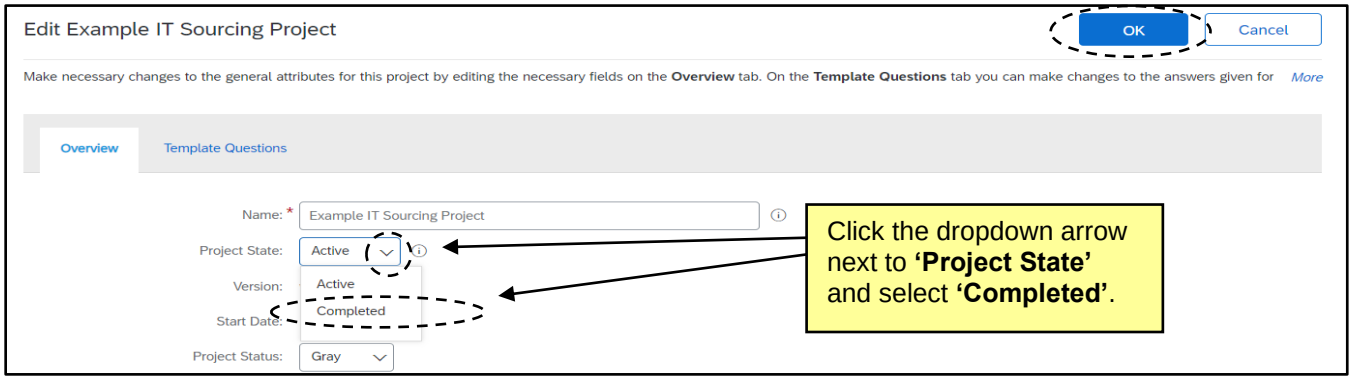
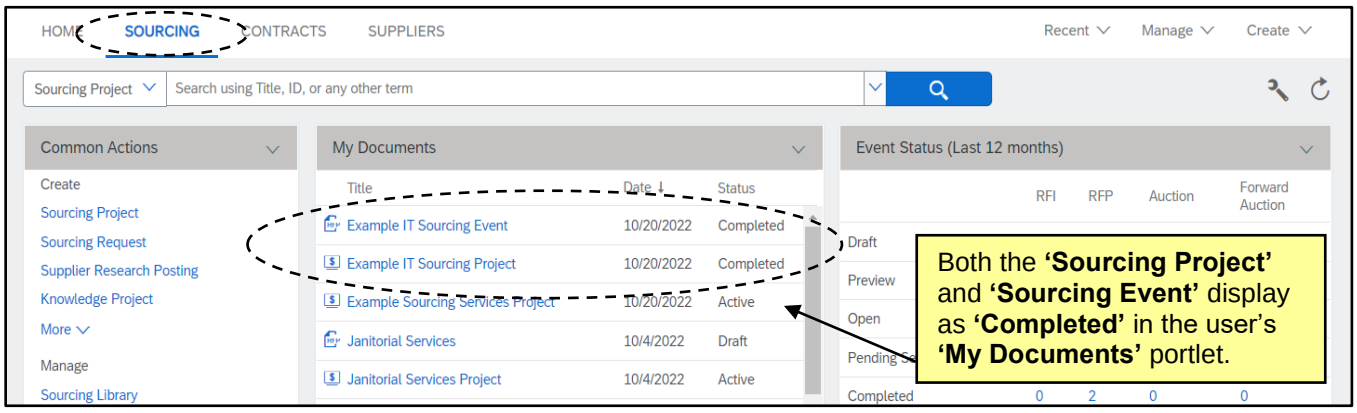
2. The **'Close Event'** warning will display reminding the Sourcing Project Owner that **'Closed'** Sourcing Events cannot be reopened. This is okay because the Sourcing Event can still be accessed for important historical information. Click **'OK'**.



3. The Sourcing Event status will update to **'Completed'**. Now navigate back to the **'Overview'** tab of the Sourcing Project to mark that as **'Completed'** too. Click **'Actions'** at the top of the **'Overview'** tab and select **'Edit Overview'** from the dropdown menu.



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



5. 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.