Managing and Awarding a Sourcing Event (Non-IT)

Introduction

Once a Sourcing Event is published and open for bidding, vendors have through the allotted time per the **Due date** to provide electronic responses to the solicitation. These responses are concealed from the Project Owner until envelopes are opened once the **Due date** passes. During the time that an Event is open, vendors can ask questions through Event Messages, and Project Owners can respond, if needed, by creating Addendums or even extending the timing of the 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, such as gaining P&C's approval of the Award Recommendation Packet.

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 the 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 P&C to award the solicitation.

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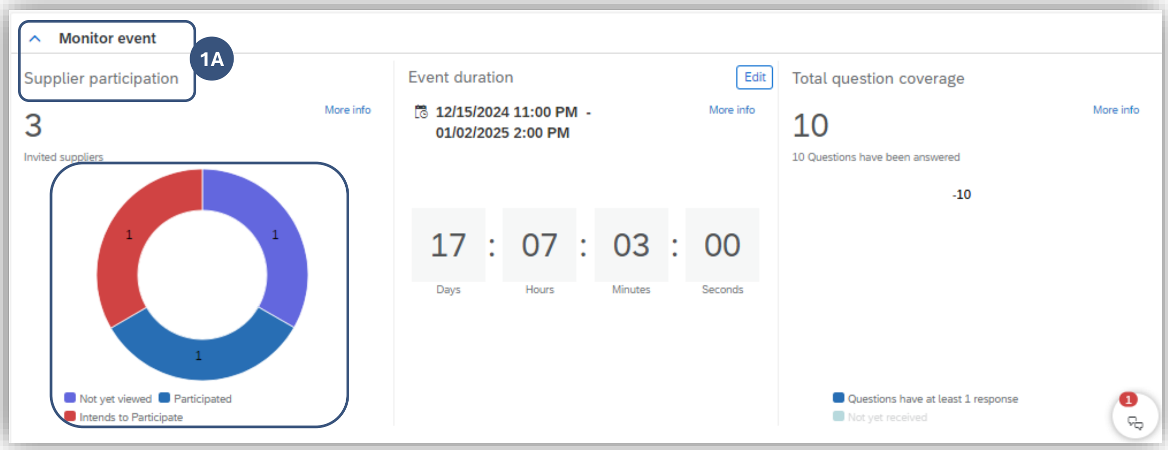
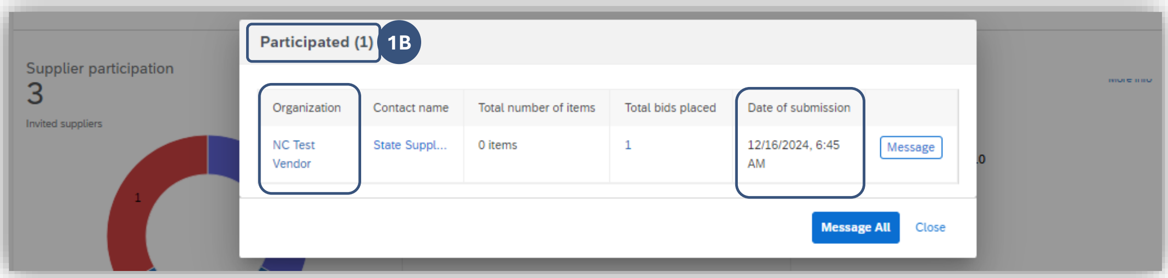
Identifying Participating Vendors and Vendor Questions

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 that 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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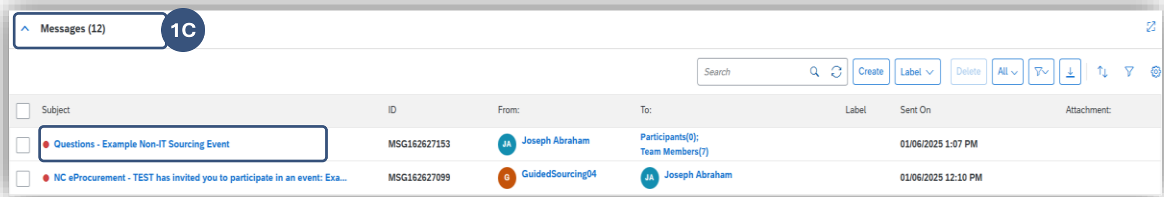
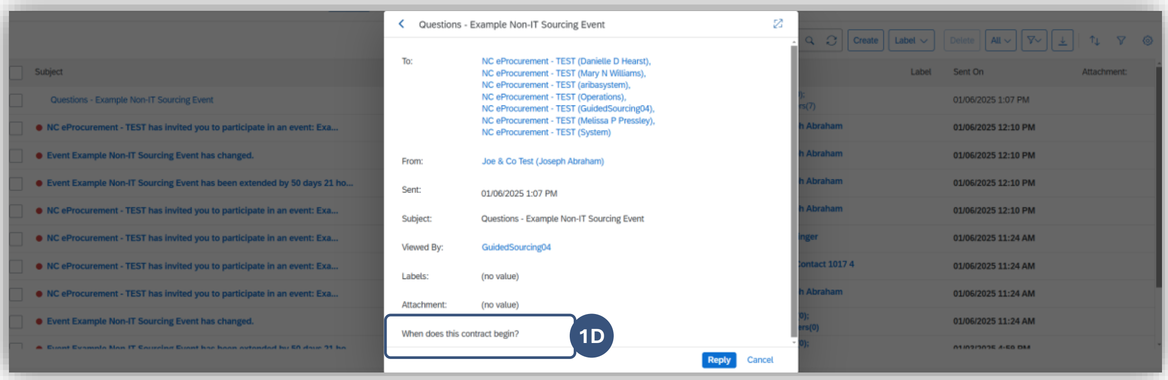
C. If a vendor has any questions during the Q&A period, they are instructed to submit them to the contact listed on the first page of the solicitation document via email or through Sourcing Event **Messages**. Sourcing Project Owners will be notified when they receive an Event **Message** in multiple 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.

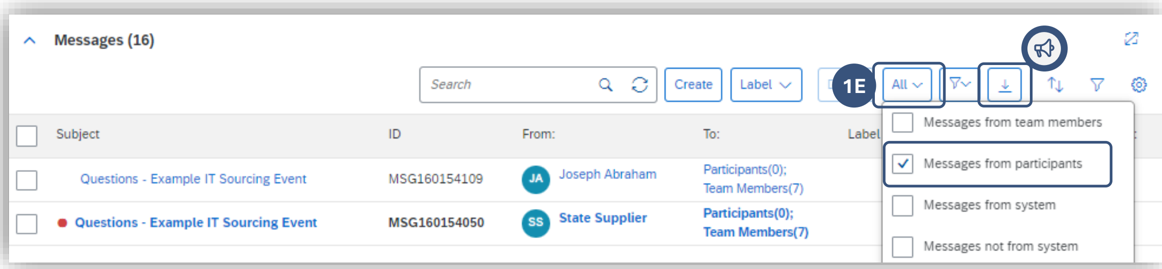


D. The **Message** popup will display, and the Sourcing Project Owner can see the vendor's question at the bottom among other details.



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.

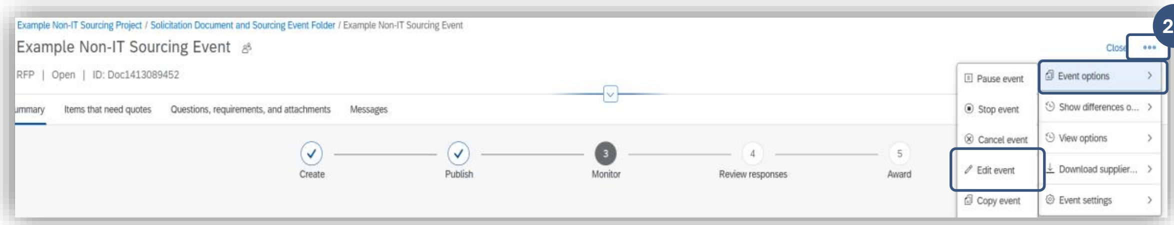
Clicking the download icon will provide an option to **Download all attachments** or **Download as a spreadsheet**. To collect all vendor questions in written form, select **Download as a spreadsheet** and the results can be filtered with the question content populating the **Description** column.



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.

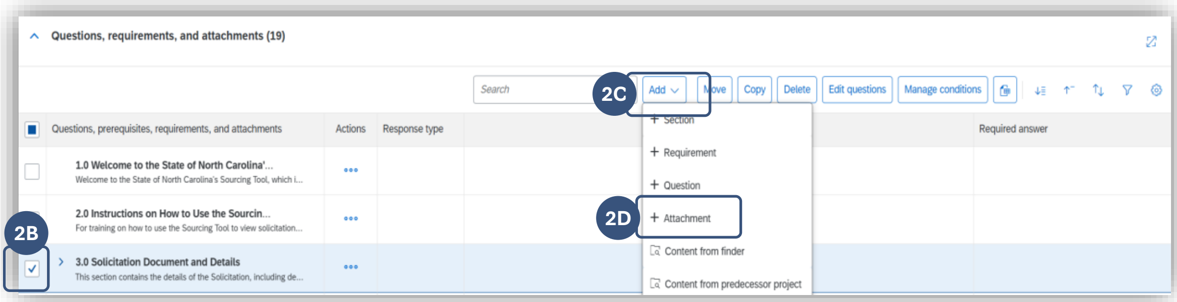
A. When the Q&A period is over and all vendor questions have been reviewed, the Sourcing Project Owner can post an **Addendum** in the Sourcing Event Content to address the questions for all participating vendors to see. Click into the Sourcing Event, select the three dots at the top right, hover the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



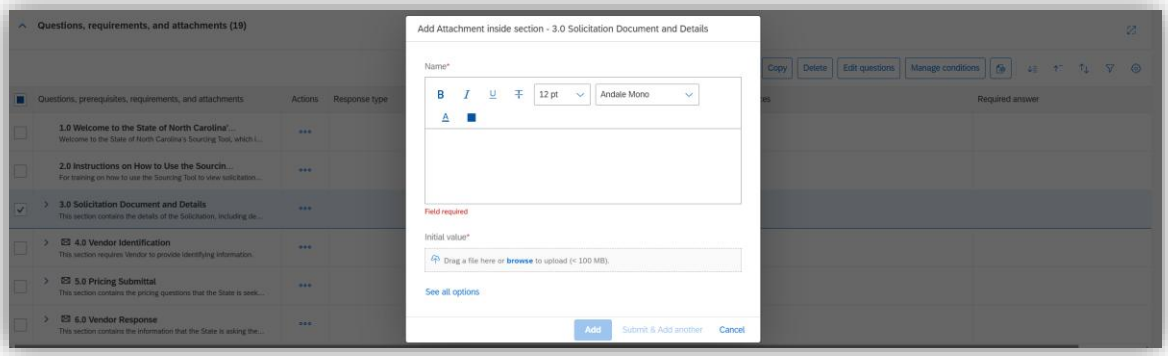
B. Navigate to the **Questions, requirements, and attachments** (Content) section and check the box next to Section **3.0 Solicitation Document and Details**.

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

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

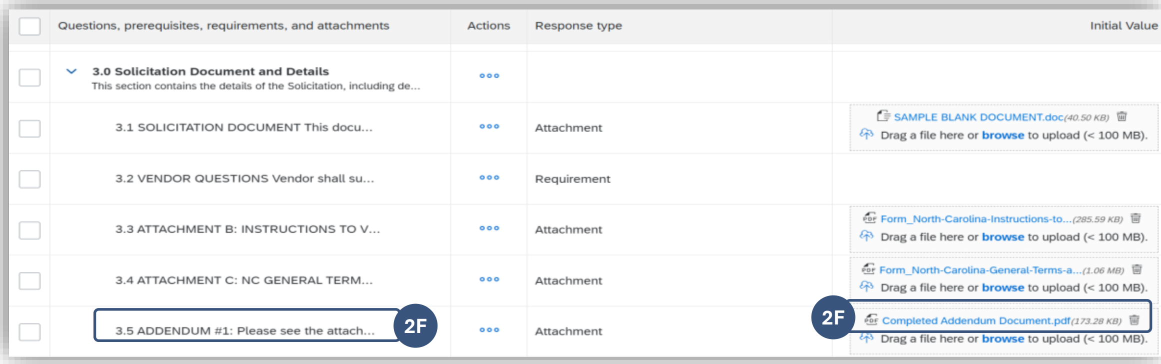


E. The **Add Attachment** popup will display, and the attachment will automatically be assigned to Subsection **3.5**. Click **browse** to attach the completed Addendum document in the **Initial Value** field and add a description in the **Name** field to let the vendors know this is where they can find the answers to their questions, then click **Add**.



If the Sourcing Project Owner needs the addendum to be signed and returned, they can add a corresponding **Question** with a **Response type** of **Attachment** in the **Vendor Response** section of the Event that collects the signed version.

F. The newly added subsection **3.5** will now display with the Addendum document attached for the vendors to review.

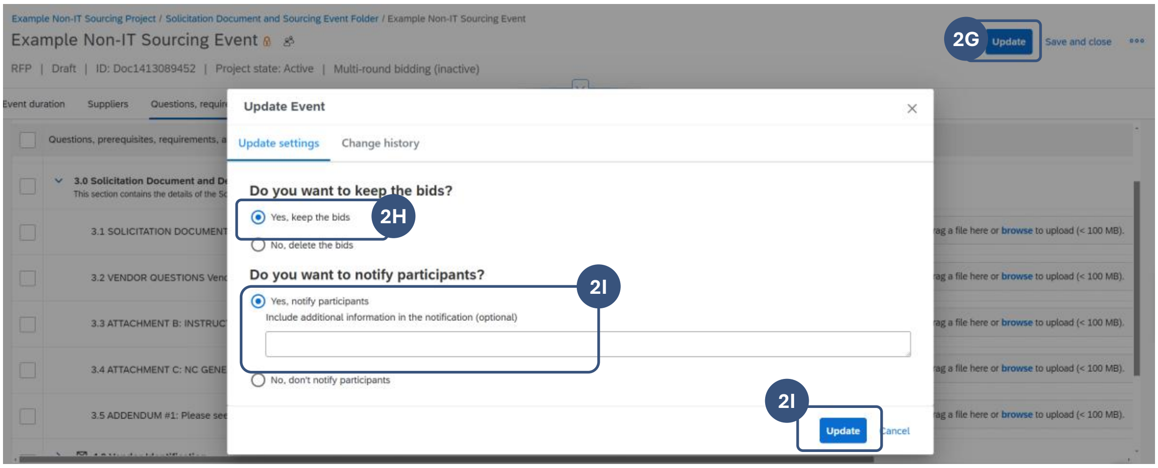


G. If all edits are complete, click **Update** in the top right.

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.



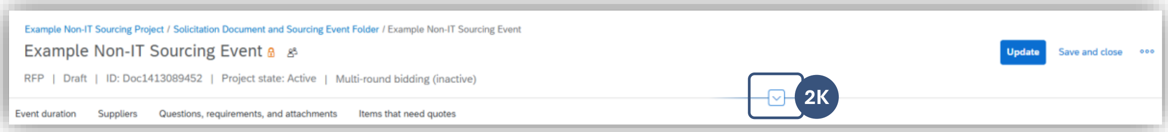
J. The addendum and any new attachments from Section **3** of the Sourcing Event will be automatically posted to Public eVP and the HUB Opportunities page, and they can be found on the **Addenda** and **Documents** tabs of the solicitation in the Agency App. If there were any issues with the public posting,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

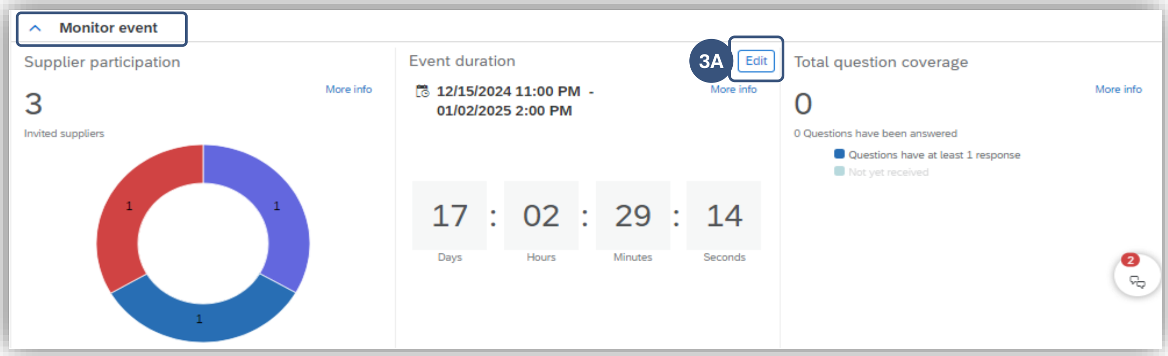
Although it is possible to edit the Sourcing Event **Title** by clicking on it, changes to the **Title** will not transmit to Public eVP. Once a Sourcing Event is **Open**, the public **Title** cannot be updated.



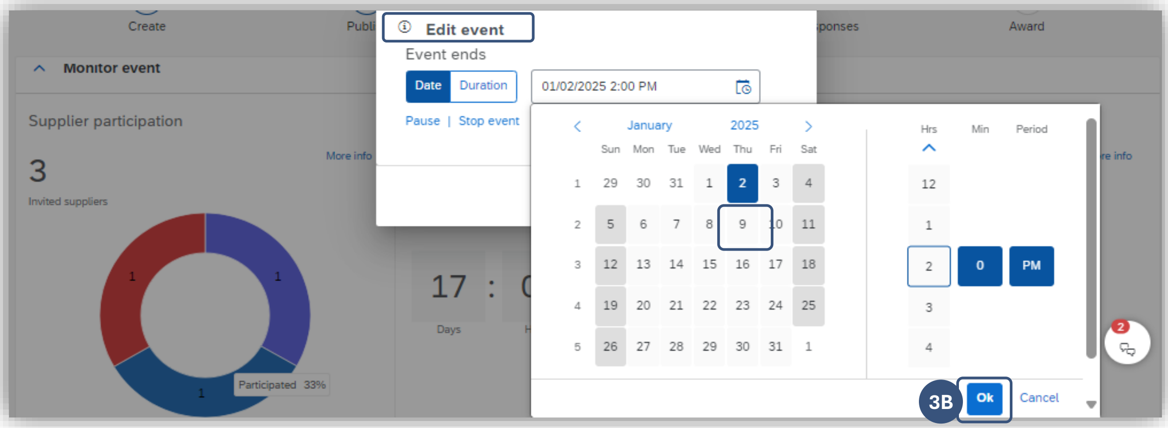
Extending the Timing on a Published Sourcing Event

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 select **Update.**



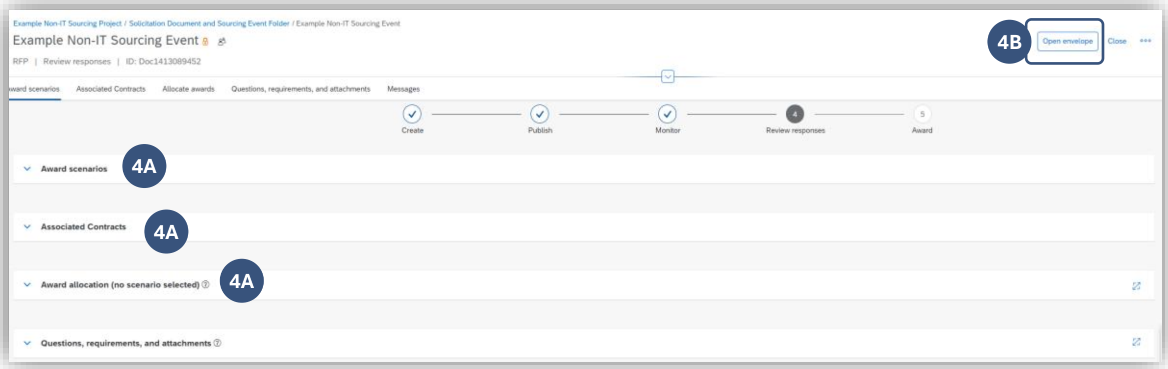
C. The Opening Date timing will be automatically updated in Public eVP and the HUB Opportunities page, and will also be reflected on the on the **General** and **Addenda** tabs of the solicitation in the Agency App. If there were any issues with the public posting, the user will receive an email stating,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

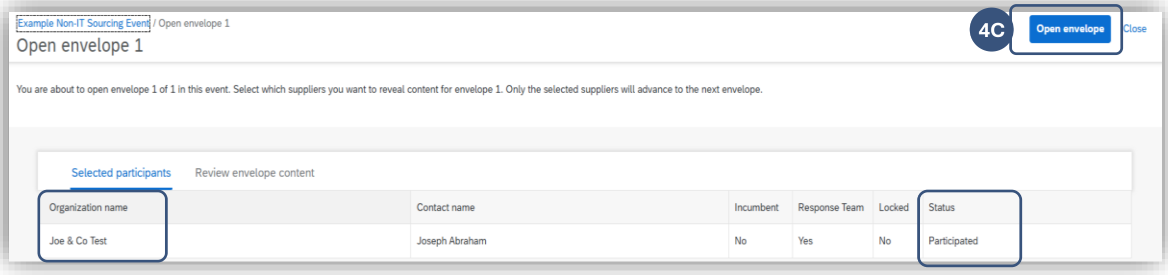
4 When the Sourcing Event reaches the response **Due date**, the event status becomes **Pending Selection**. At this point, the Sourcing Project Owner can open the **Envelopes** to review the responses.

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.

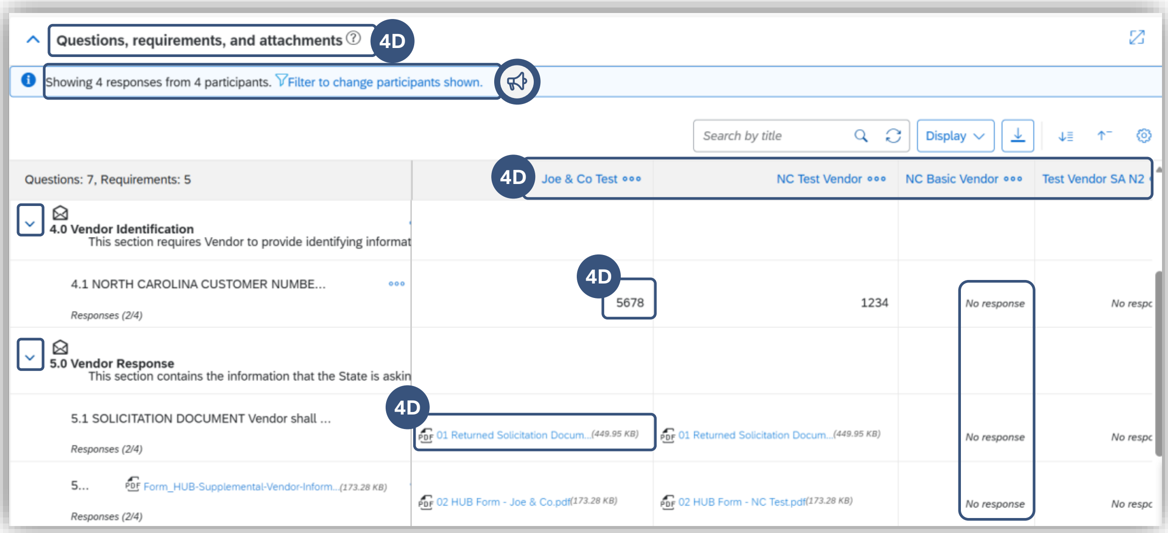


C. The **Open envelope 1** page will display a list of the participating vendors. Click **Open Envelope** again to compare the responses.

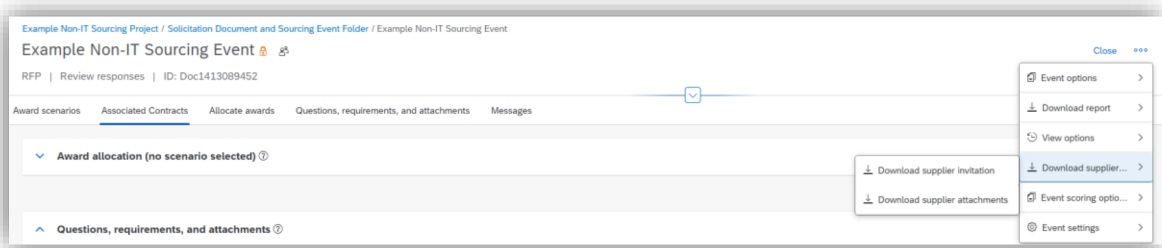


D. Navigate to the **Questions, requirements, and attachments** (Content) section if not already there and scroll down to see the responses revealed to the right of **Section 4, 5, and 6**. The vendors name will display at the top of the column. If there are several responses, the Sourcing Project Owner 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. Click on each attached document to download it individually.

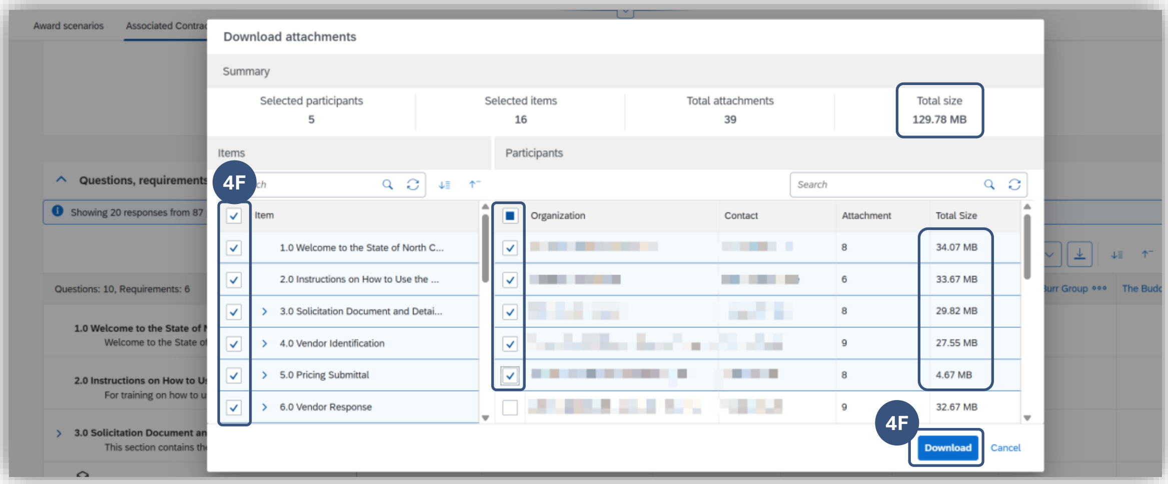
This section will display up to 40 vendor responses. If more than 40 vendors submitted a response, click the **Filter to change participants shown** link to manually adjust which vendors display in this section.



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**.



It may take a few seconds for the data in the **Attachment** and **Total Size** columns to populate after selecting **Item** and **Organization** if the Sourcing Event has many vendor responses.

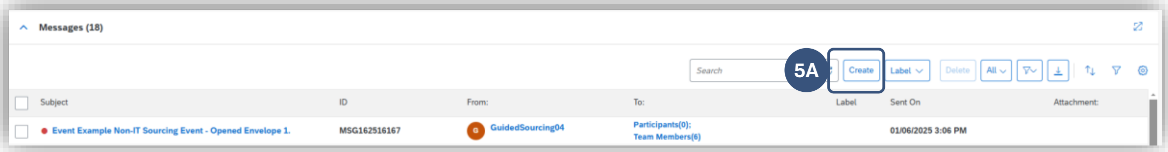
The maximum size for one download is 500MB. If the total of all attachments in the Event exceeds that limit, the Project Owner will need to download in batches below that limit. The **Total Size** column should be the guide, and as additional **Organizations** are selected, the overall total for that batch will populate in the **Total size** field in the **Summary** section up top.

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.

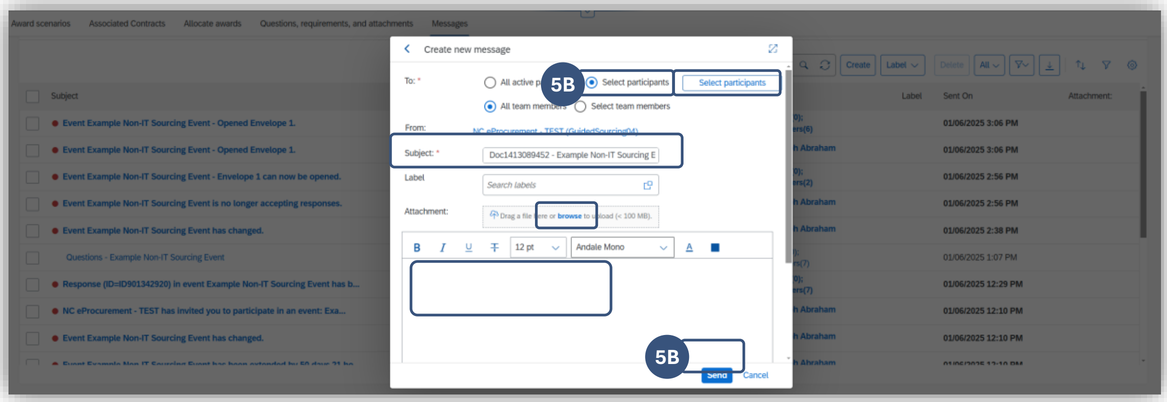
Seeking Clarification

5 While reviewing the vendor responses, it may be necessary to seek clarification with certain vendors. A **Request for Clarification** Template is available in the **Sourcing Project Documents** folder. 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 can be found in the **Sourcing Project Documents** in the **Events and other documents** section of the sourcing project). 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 further decisions.



The same steps should be taken via Event **Messages** to send a BAFO request to a vendor later in the process (**Phase 06**) if applicable. The only change being that the Sourcing Project Owner would obtain a different document templates from the **BAFO Documents** folder in the **Events and other documents** section, as well as sending drafts to P&C for review via a task before sending the final version to the vendor.

NORTH CAROLINA ePROCUREMENT

Send Award Recommendation Packet to P&C for Review

6 After all information has been received and considered, the user can develop an **Award Recommendation Packet** and post the final Bid Tabulation and Award Notification on eVP. If the solicitation was previously approved by P&C, the **Award Recommendation Packet** will also need to gain P&C approval before the solicitation can be officially awarded to a supplier. This is done via the built-in **Gain P&C Approval of Award Recommendation Packet** task in **Phase 06** of the **Tasks** section.

A. From the **Sourcing Project** scroll down to the **Events and other documents** section, expand the **Award Recommendation Documents** folder and click on the **Award Recommendation Memo** template. Next, select the three dots in the upper right-hand corner of the screen and select **Download** from the dropdown. Complete this same steps to download a template for the **Bid Administrative Review Template**, the **Bid Award Recommendation Packet Checklist,** and **the Bid Opening Sheet** template. The **Replace with...Template** is not intended to be downloaded here, just replaced. The original can be found in the **Solicitation Document and Sourcing Event Folder**.

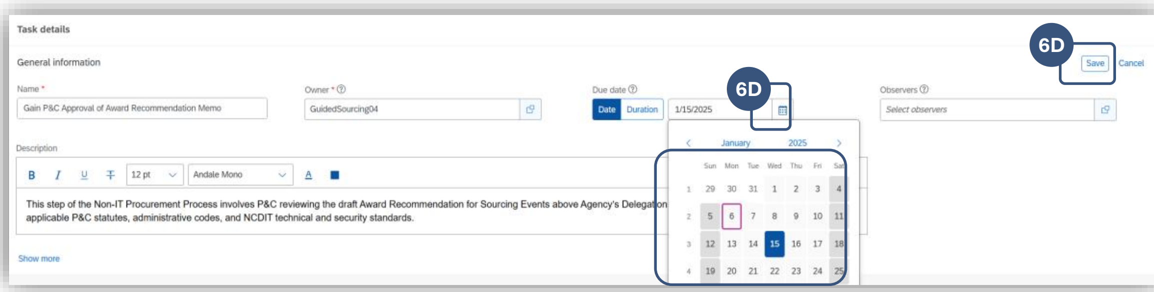
> Various tasks in **Phase 05** are attached to the documents in this folder, so they may have already been downloaded and completed by this point.

B. Upload the completed forms in the **Award Recommendation Documents** folder by replacing the template documents and upload any additional required documents per the **Bid Award Recommendation Packet Checklist**.

> 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. After all required documents have been replaced or added, navigate to the **Tasks** section and mark the **Develop Award Recommendation Packet** task complete. Next, click on the **Gain P&C Approval of Award Recommendation Packet** task.

D. In the **Task Details**, click the **Edit** button. Use the date picker in the **Due Date** field to set a due date for the task and click the **Save** button.



E. Click the **Submit** button to send the task to P&C for review.

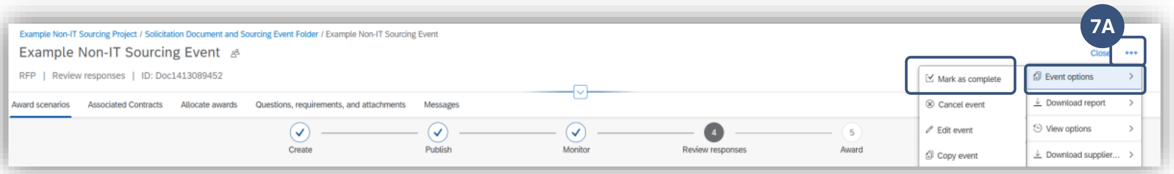
F. When the task has been submitted, its status in the **Tasks** section will automatically update to **In Approval**. To monitor the process of the approval, click on the task. Look for any comments by a P&C approval group in the **Comments and activity history** section.

G. After P&C reviews and approves the **Award Recommendation Packet**, the task will automatically update to **Approved** status. The user can now proceed through the remaining steps to officially award the solicitation.

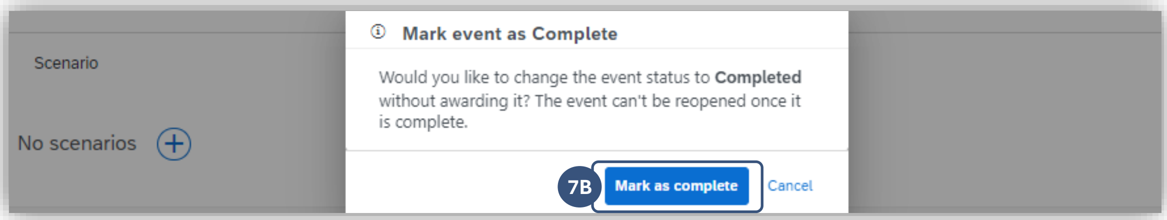
Completing the Sourcing Event and Project

7 Once the solicitation has been officially awarded per the process outlined by P&C, 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.

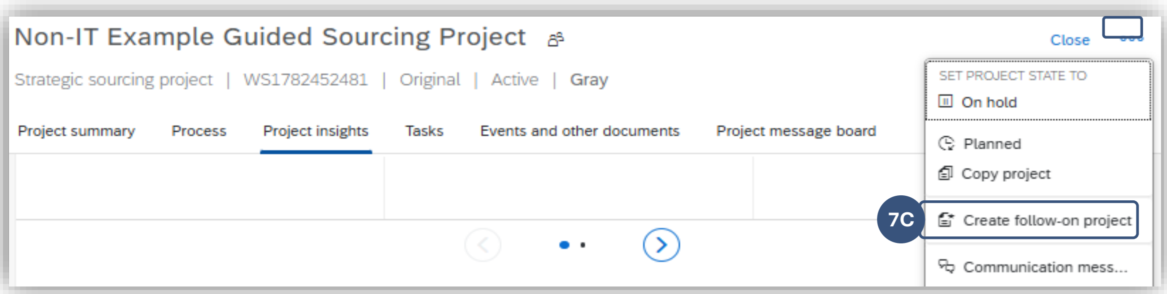
A. Once the solicitation has been officially awarded and notification has been posted to eVP, return to the Sourcing Event to close it. Even though an award has been issued, the status will still read **Pending Selection** because the award was determined outside of the Sourcing Event. To manually close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



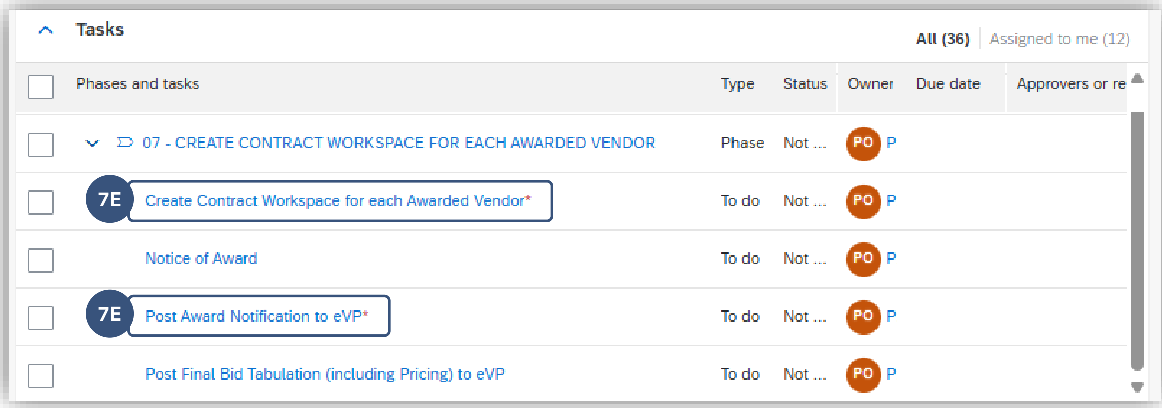
B. The **Mark event as Complete** warning will display, reminding the Sourcing Project Owner that completed Sourcing Events cannot be reopened. This is okay because the Sourcing Event can still be accessed for important historical information. Click **Mark as complete**.



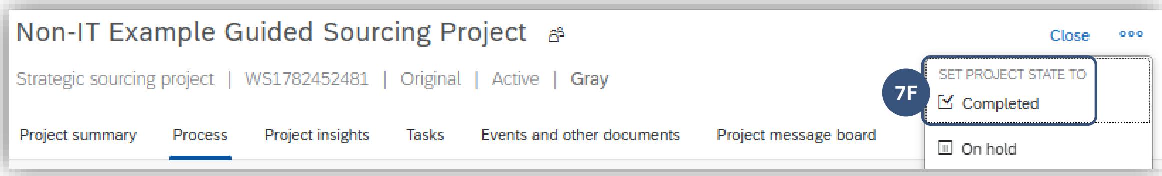
C. The Sourcing Event status will update to **Completed**. Navigate back to the Sourcing Project to complete all remaining required tasks in **Phase 07**. Begin by clicking the three dots in the top right of the Sourcing Project and selecting **Create follow-on project** from the dropdown. Select **Contract workspace** on the subsequent page and create a Contract Workspace so that the CW# can be used when creating an Award in eVP. For more information on this process, please see the [Creating a Contract Workspace from a Sourcing Project Job Aid](#).



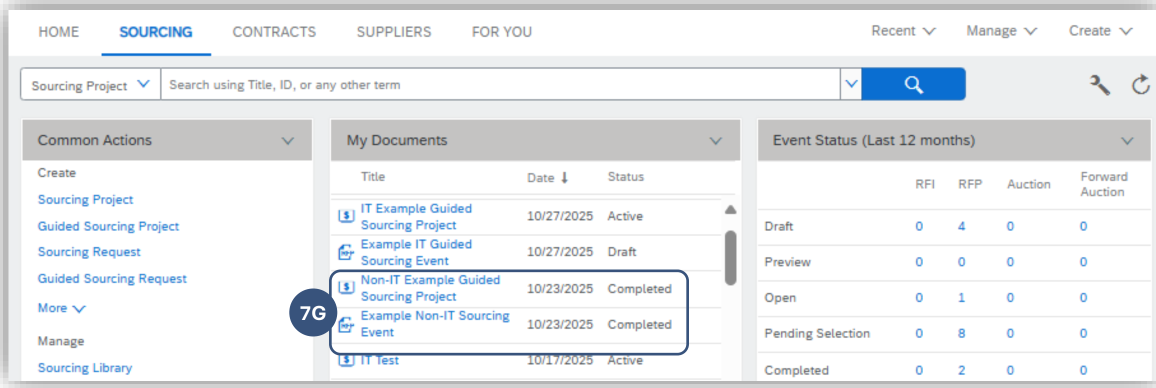
E. In **Phase 07** of the **Tasks** section, mark the tasks for **Create Contract Workspace for each Awarded Vendor** and **Post Award Notification to eVP** as **Complete**.



F. Now that all required tasks have been marked complete, click the three dots in the top right of the Sourcing Project and select **SET PROJECT STATE TO Completed** in the dropdown to finalize this Sourcing Project.



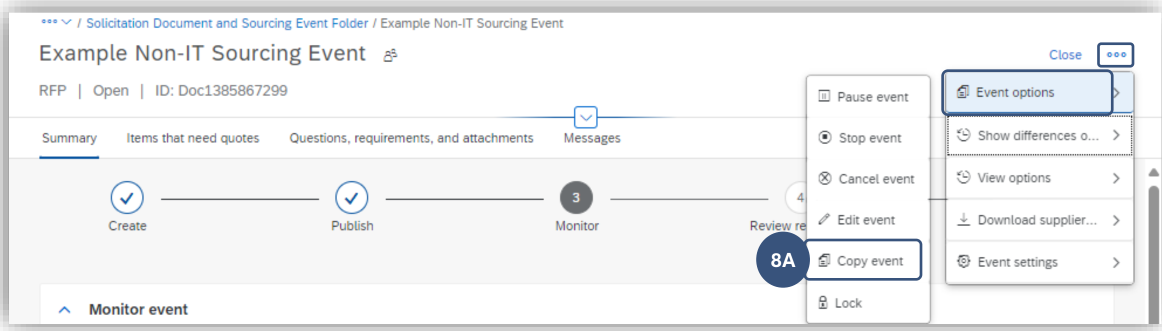
G. The status of both the Sourcing Project and Sourcing Event will now reflect Completed and will display as such in the **My Documents** portal on the **Sourcing** tab.



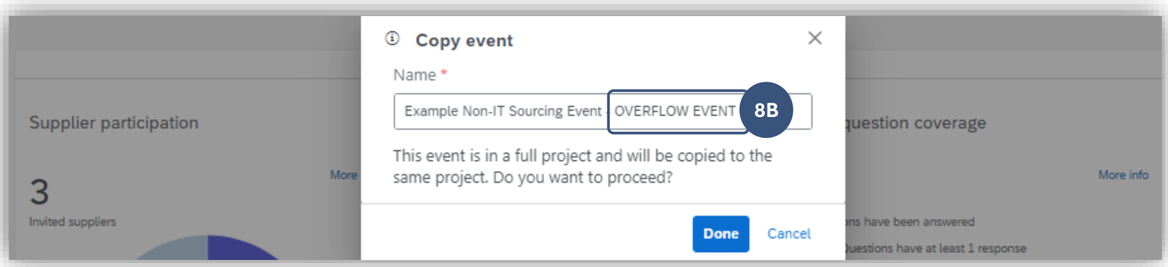
Creating an Overflow Event

8 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 nears 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.

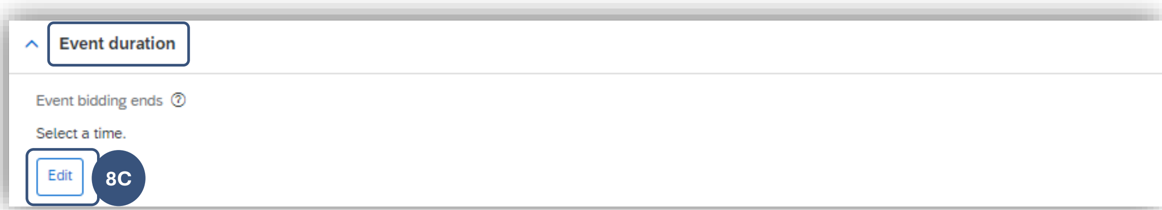
A. From the original Sourcing Event approaching 100 supplier responses, click on the three dots at the top right, hover over **Event options**, and select **Copy event** from the popup.



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.



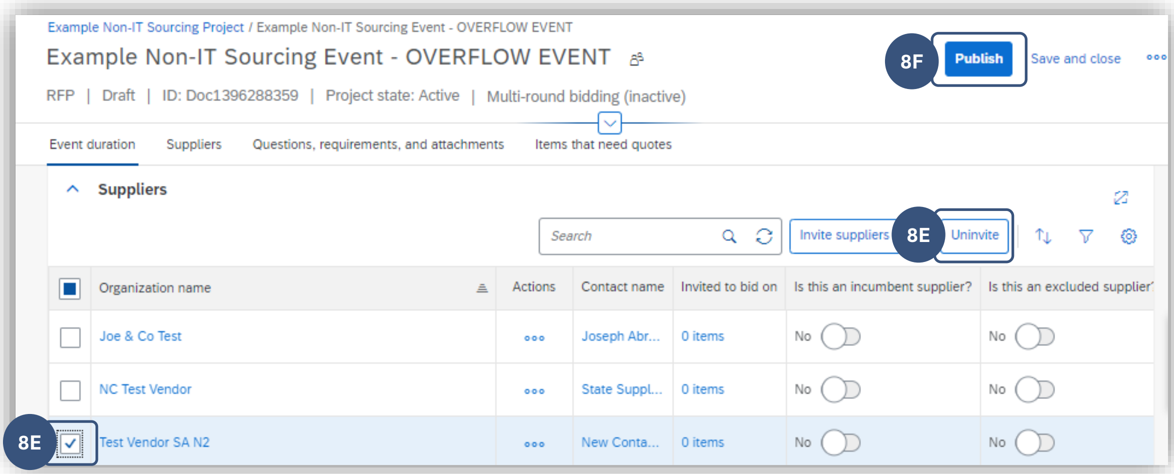
If it is within three business days of the **Due date**, the Overflow Event will NOT post publicly on eVP (which is the desired result). If the Overflow Event is being created in advance, the NC eProcurement team will remove it from the public site as soon as it's posted.

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 the original Event, there will be no indication which suppliers are in what status on the new Event. 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.