NC eProcurement

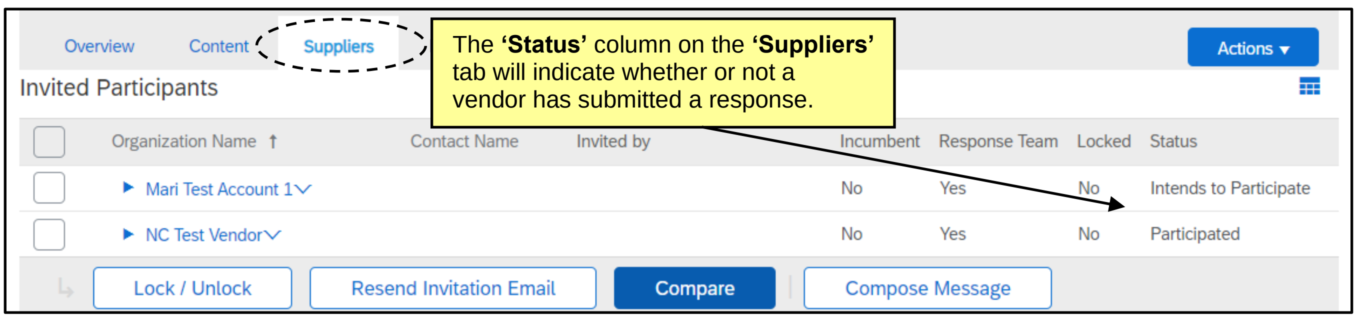
Managing and Awarding a Sourcing Event (Non-IT)

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 Sourcing Agent 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 Sourcing Agents 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.

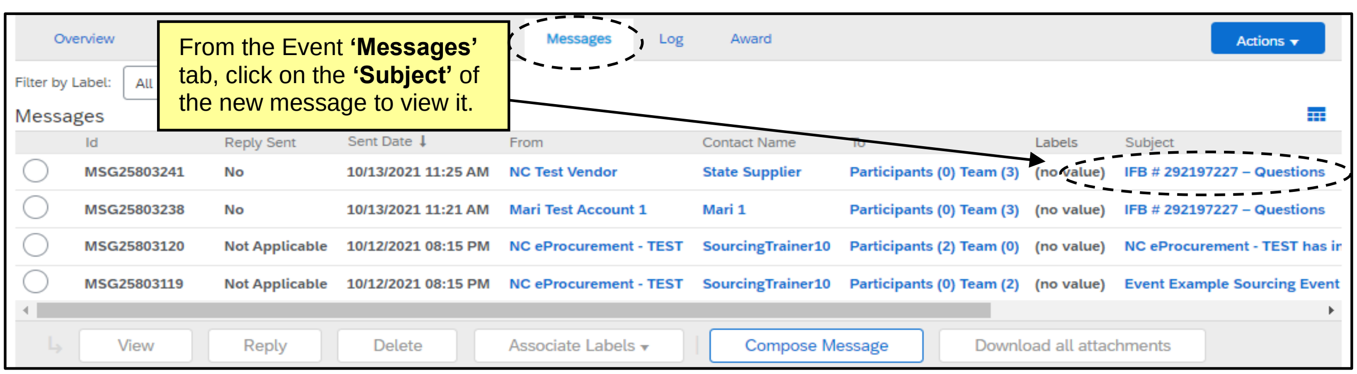
I. Identifying Vendors and Responding to Vendor Questions

Even though they won't be able to see the responses until after the **'Due Date'** expires, Sourcing Agents can check the **'Suppliers'** tab at any time to see which vendors have responded. During the Event, if vendors have any questions, they will submit them via the Event Messages page.

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

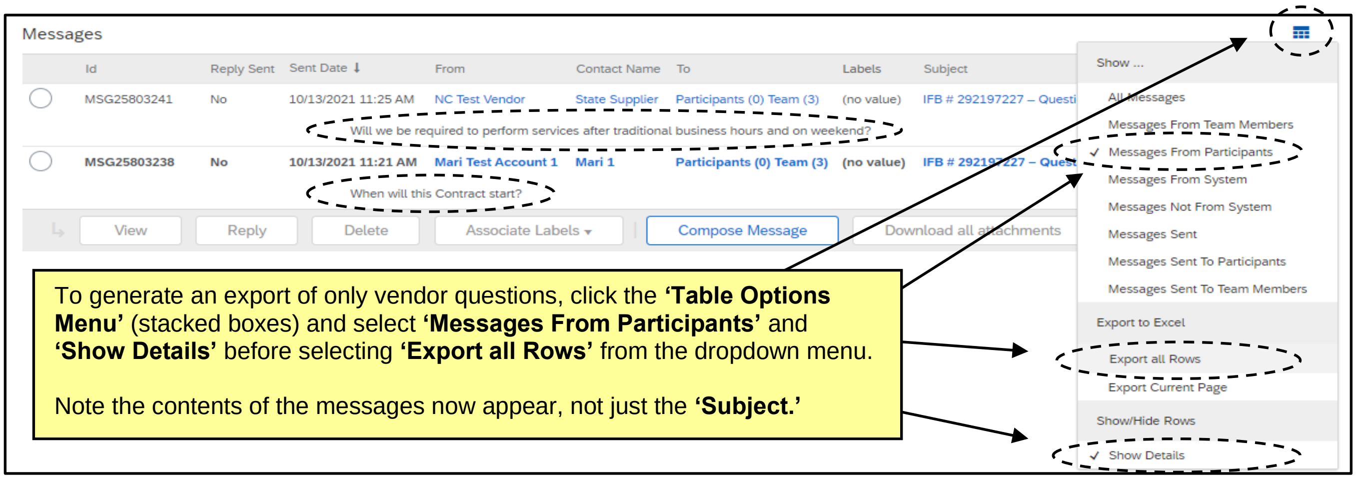


2. If a vendor has any questions during the Q&A period, they are instructed to submit them via the Event Messages page. A notification will appear on the user's home page when a message is received, or a user can check the **'Messages'** tab on the Event at any time to see these messages. Click on the **'Subject'** of the new message to read it.



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

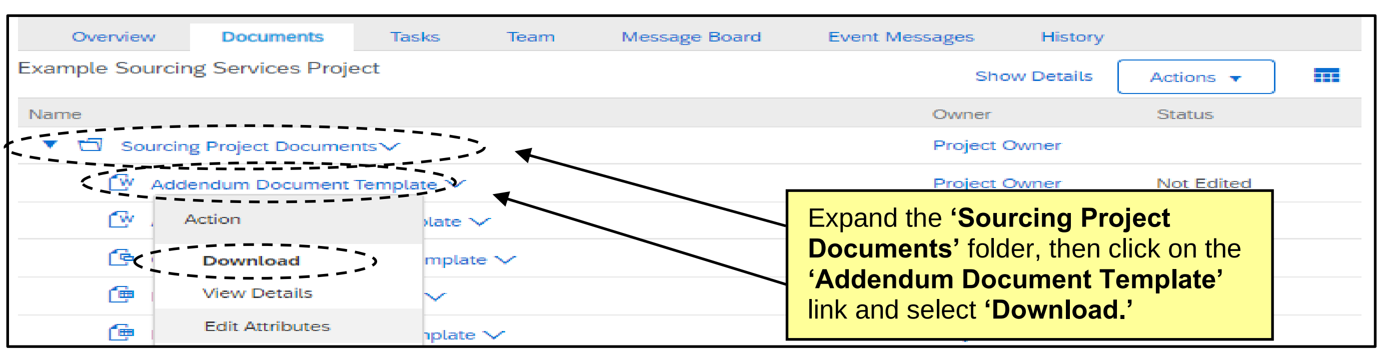
4. If the user would like to generate an export of only the vendor questions within the Event **'Messages'** tab, they can click the **'Table Options Menu'** icon (stacked boxes) below the **'Actions'** button, then select **'Messages From Participants'** and **'Show Details'** from the dropdown. Finally,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



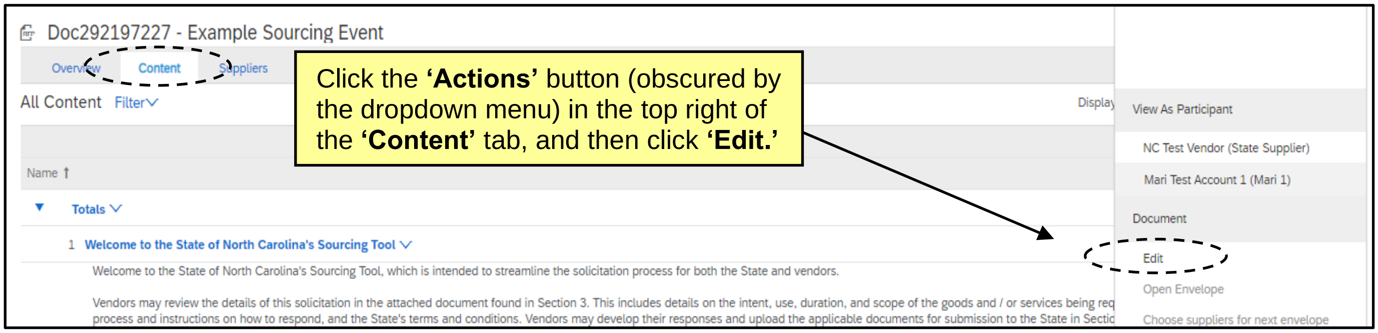
II. Creating an Addendum

Sourcing Agents can provide answers to vendor questions – or make any other necessary updates to the Event – by posting an **'Addendum'** in the Event before responders submit their final bids.

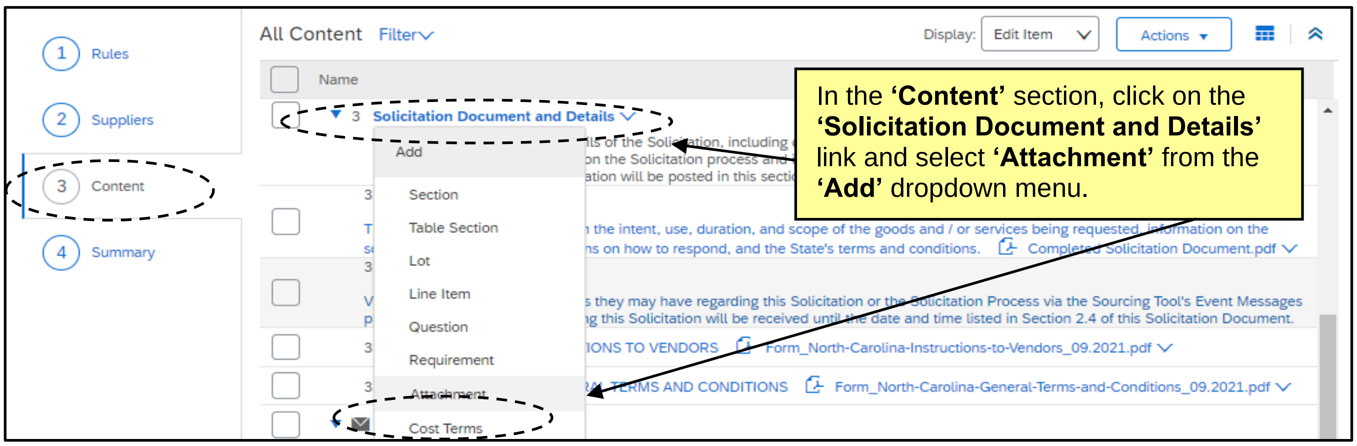
1. When the Q&A period is over and all vendor questions have been reviewed, the user may need to create an **'Addendum'** to address the questions. From the **'Documents'** tab on the Project, expand the **'Sourcing Project Documents'** folder, then click on the **'Addendum Document Template'** link and select **'Download.'** Fill the document out, rename it, and save it back into the Project.



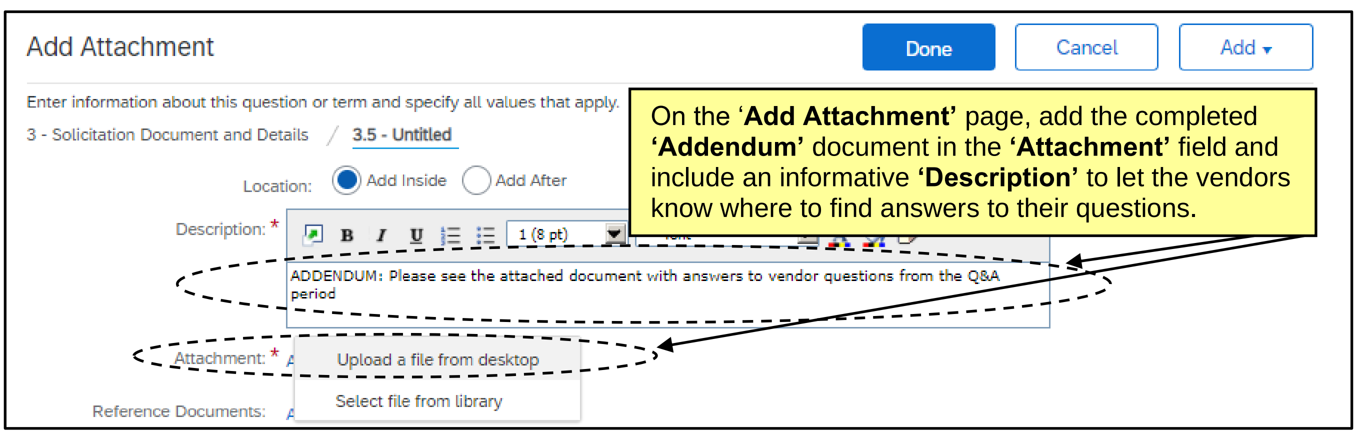
2. **‘Monitor’** the Event again from the Project’s **‘Documents’** tab, and then navigate to the Event **‘Content’** tab. Click the **‘Actions’** button in the top right and select **‘Edit’** from the dropdown menu.



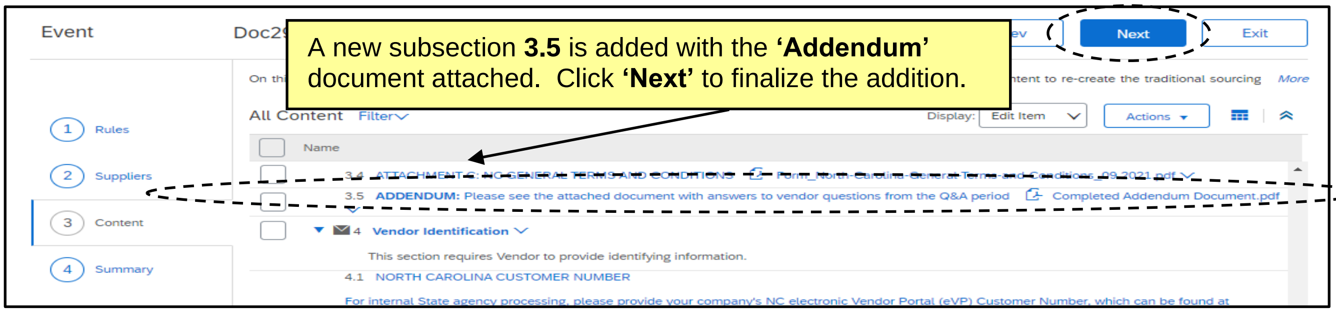
3. Click the **‘Content’** link on the left side of the screen, click on the **‘Solicitation Document and Details’** link next to **3,** and select **‘Attachment’** from the **‘Add’** dropdown menu.



4. The **‘Add Attachment’** page will display, and the attachment will automatically be assigned to subsection **3.5.** 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.’**

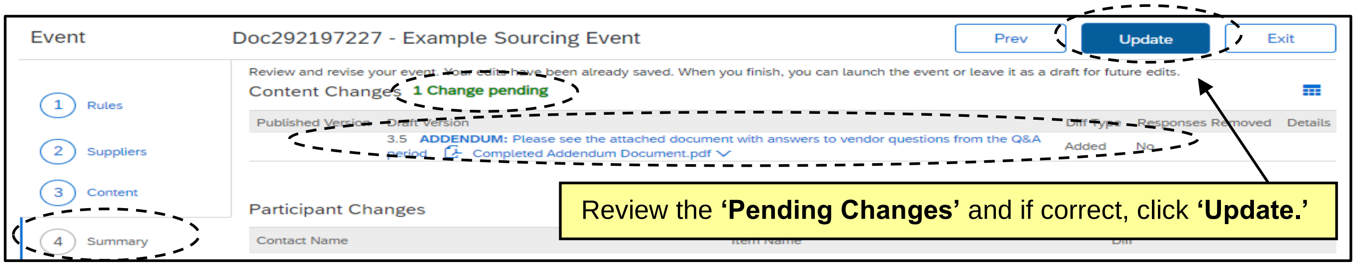


5. The newly added subsection **3.5** will now display with the **‘Addendum’** document attached for the vendors to review. Click **‘Next.’**



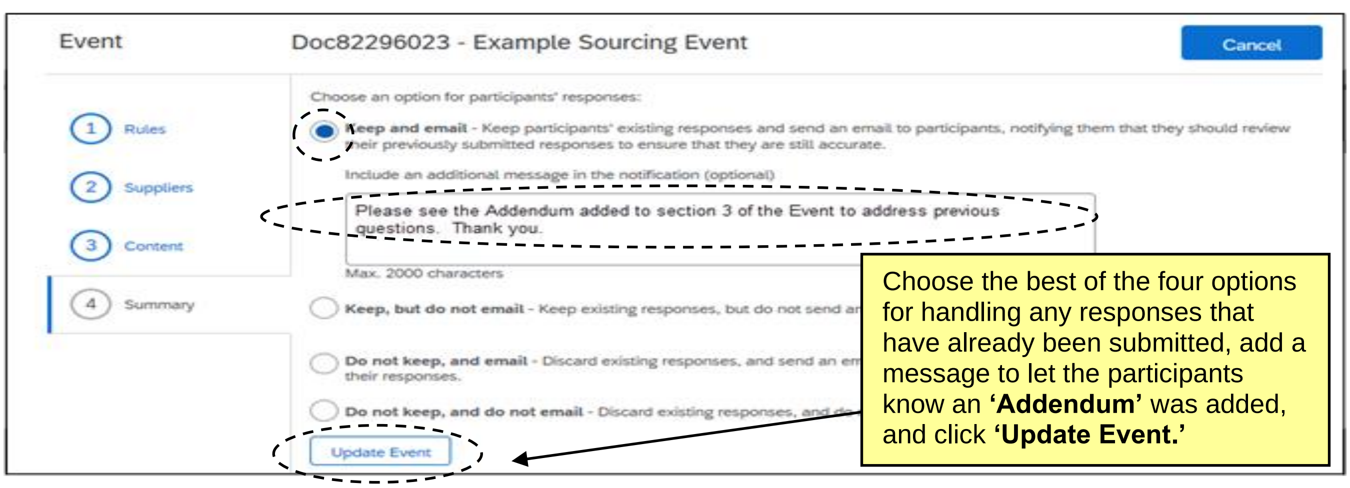
6. The **'Pending Changes'** will display in the **'Summary'** section where the user can review the change before finalizing it by clicking **'Update'** in the top right.

   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.



7. A final review page will display giving the user 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 P&C 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 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.

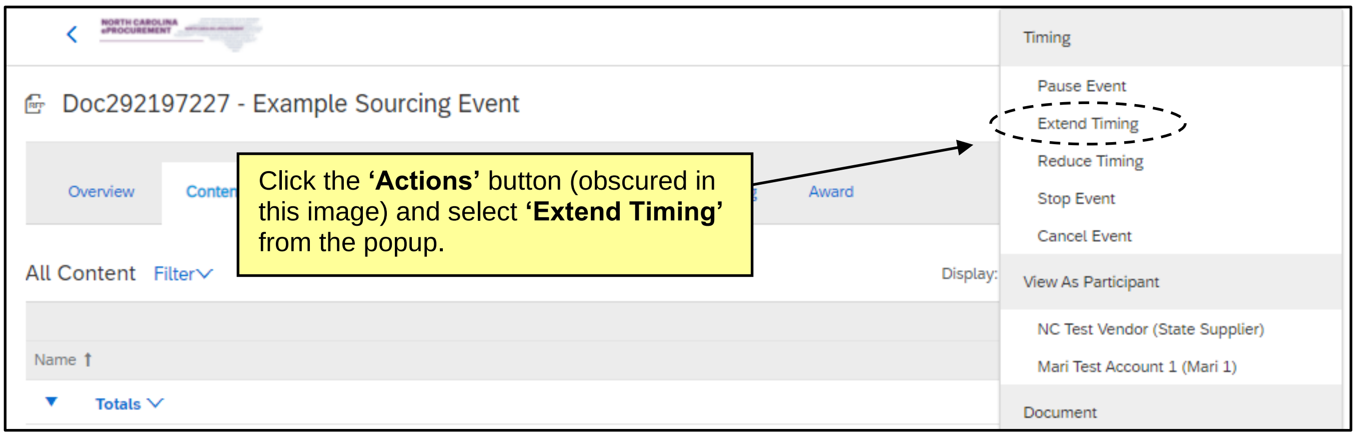


8. The addendum and any new attachments from Section 3 of the Event will be automatically posted to Public eVP and the HUB Opportunities page, and they can be found on the **'Addenda'** and **'Documents'** tabs of the solicitation in the Agency App. If there were any issues with the public posting, the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

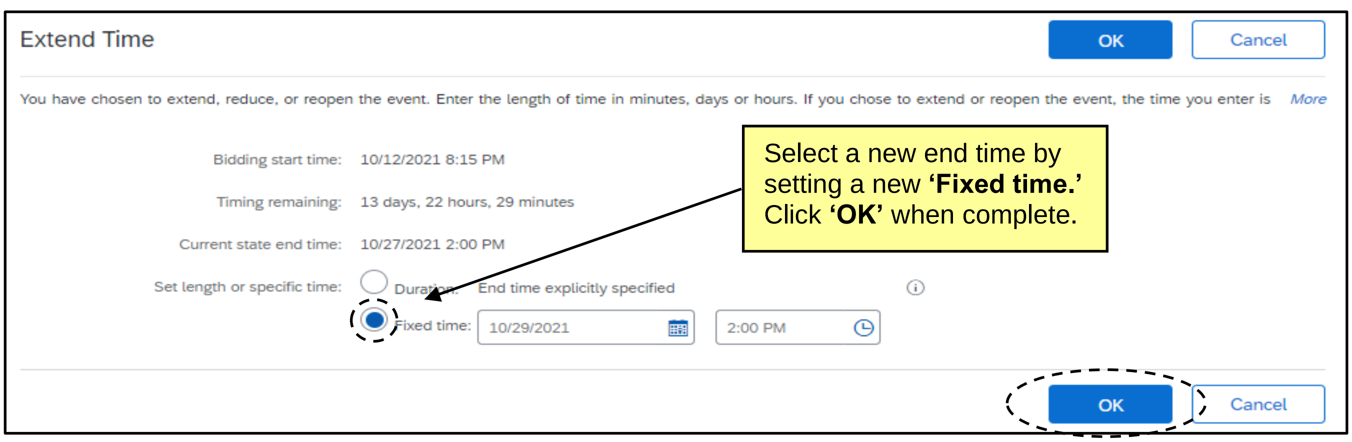
III. Editing the Timing on a Published Event

Sourcing Agents have the ability to change the timing on a published 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 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.'**

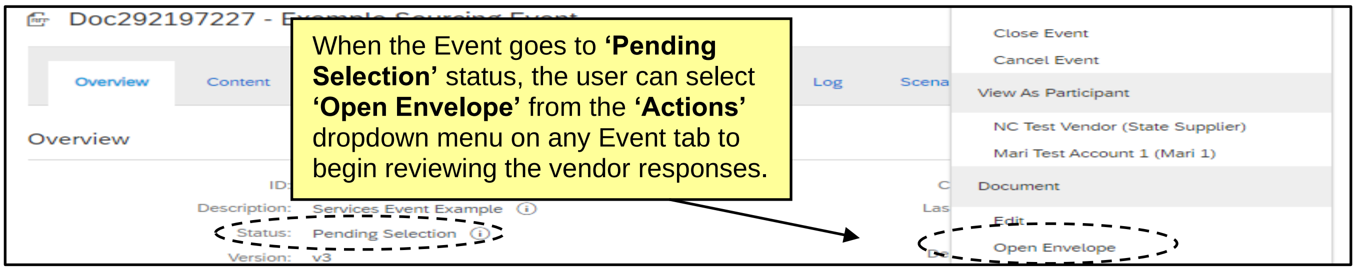


3. The **'Opening Date'** timing will be automatically updated in Public eVP and the HUB Opportunities page, and will also be reflected on the on the **'General'** and **'Addenda'** tabs of the solicitation in the Agency App. If there were any issues with the public posting, the user will receive an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

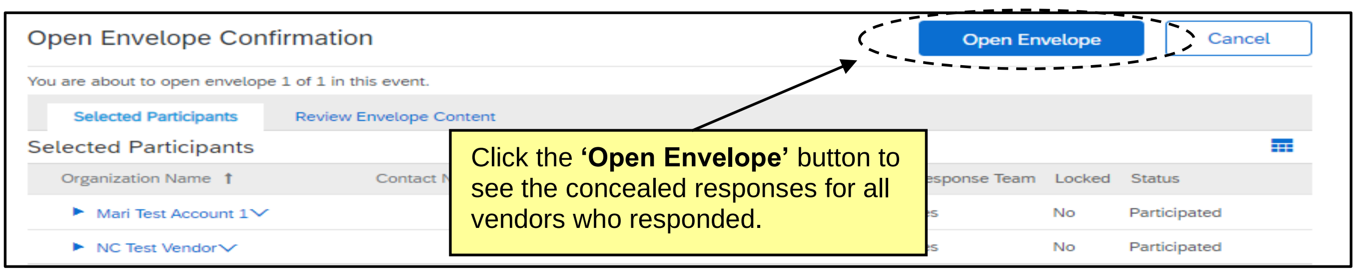
IV. Reviewing Responses and Requesting Clarification, a BAFO, or P&C Legal Review of Exceptions to Terms and Conditions

When the Event reaches the response due date, the event status becomes **'Pending Selection.'** At this point the user can open the **'Envelope'** to review the responses. Additional negotiations may be required, at which point P&C may be brought into the process via **'Tasks'** to provide guidance.

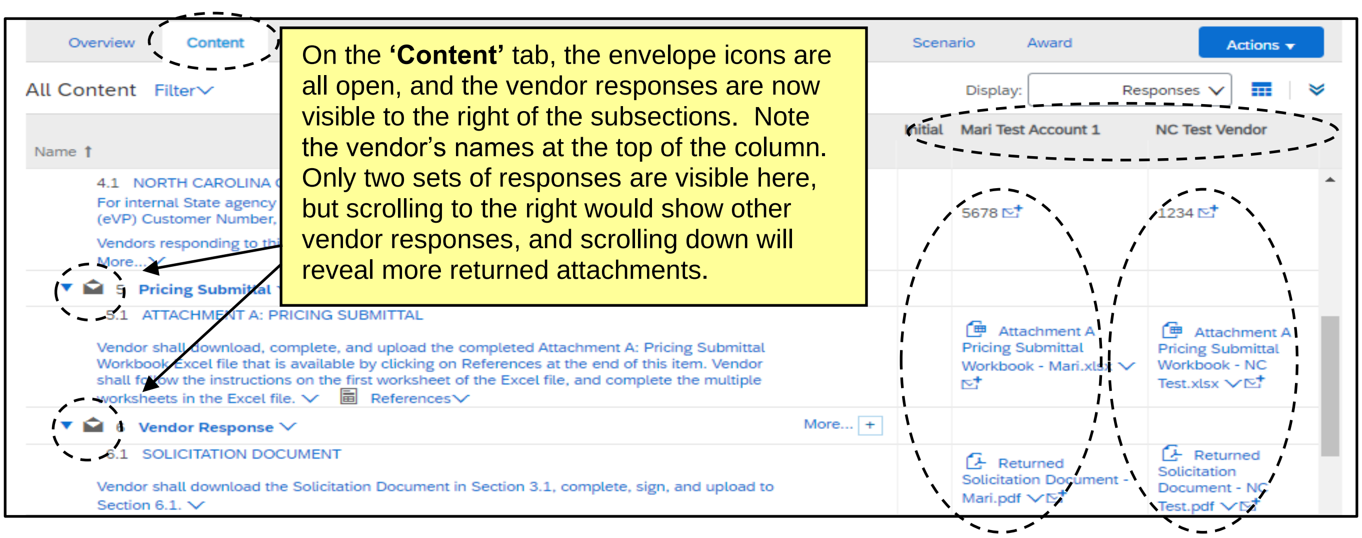
1. When the bidding is closed, the Event will go to a **'Pending Selection'** status. At that time, the user can click the **'Actions'** button in the top right (obscured by the popup menu in the image below) and select **'Open Envelope'** to begin to review the bids.



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 through 6. The vendor's name will display at the top of the column, and if there are several responses, the user will have to keep scrolling to the right to see them all.



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

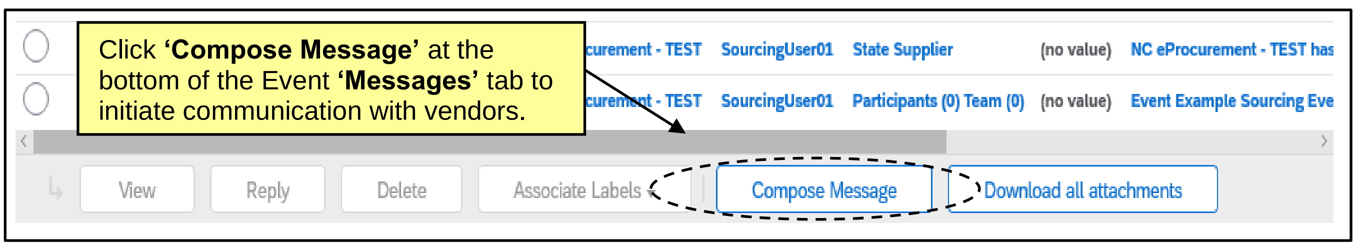
   Notes:
   - There is an option in the **'Actions'** dropdown menu to **'Download All Supplier Attachments'** where users can mass-select vendors and sections and download everything all at once. It is important to check the box next to **'Title'** under **'Selected Items'** before clicking **'Download Attachments'** on this page.

   - The **'Report'** tab on the Event has a button called **'Download Reports.'** Selecting **'Question and Terms Report'** may help in providing all vendor response information in Excel format. If users included **'Line Items'** in the Event **'Content,'** the **'Bid Comparison Report'** option provides a helpful Excel export of that information.

   - A **'Preliminary Bid Tabulation Template'** can be found in the **'Sourcing Project Documents'** folder on the **'Documents'** tab should the user desire such guidance, but it is not required to use this form.

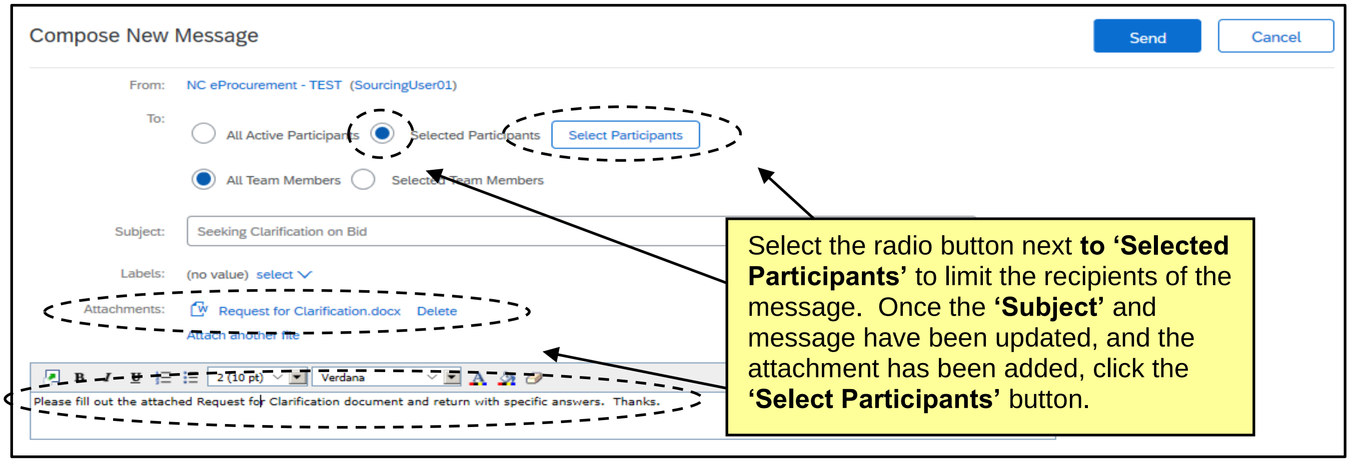
   - For more information on opening subsequent envelopes in Events with multiple envelopes, please see the **'Multi-Envelope Events'** job aid.

5. While reviewing the vendor responses, it may be necessary to seek clarification with certain vendors. This communication will be made through the Event message board. Navigate to the Event **'Messages'** tab and click the **'Compose Message'** button at the bottom of the screen.

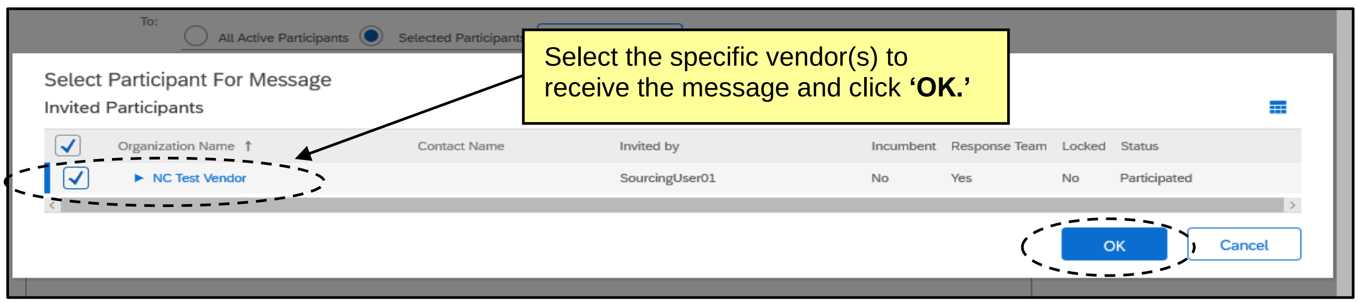


6. On the **'Compose New Message'** page, select the recipients of the message. Unlike adding an **'Addendum'** where the audience is everyone, in a situation where the user is seeking clarification, the message will likely be directed to a smaller group of participants, if not just one. Click the radio 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 template for which can be found in the **'Sourcing Project Documents'** folder on the **'Documents'** tab of the Project). Then click **'Select Participants'** to narrow down the recipient group.

   Note: A **'Request for Bid Validity Extension Template'** document can also be found in the **'Sourcing Project Documents'** folder and can be used in place of a **'Request for Clarification'** when applicable.

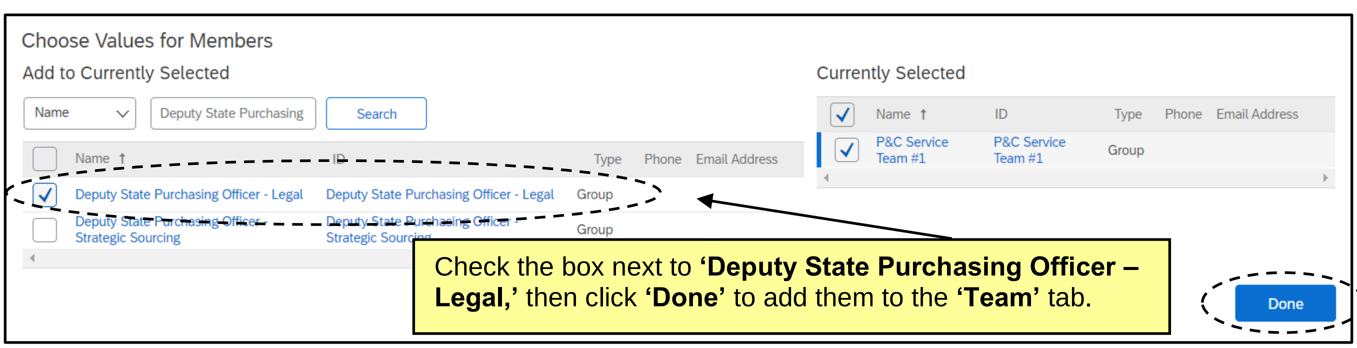


7. The **'Select Participant For Message'** popup will display, and the user can select to which vendor(s) the message should be sent; next, the user can click **'OK,'** and then click **'Send'** back on the **'Compose New Message'** page. The new message will display on the **'Messages'** tab, and the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

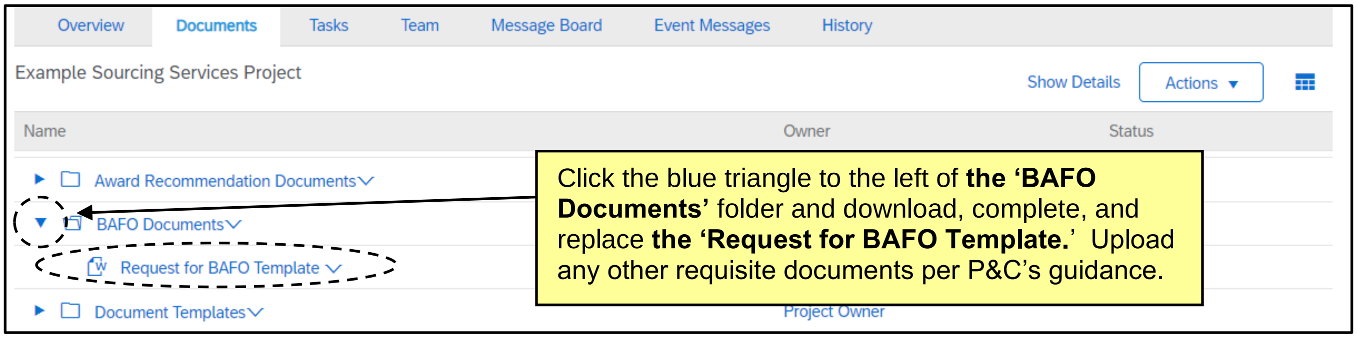


8. If a vendor in consideration for an award has requested exceptions to Terms and Conditions, P&C Legal is required to facilitate additional negotiations. When this is the case, use the **'Initiate P&C Legal Review for Negotiations of Terms and Conditions'** task in **'Phase 06.'** Before submitting the task to P&C Legal, the user must update both the **'Team'** and **'Documents'** tabs.

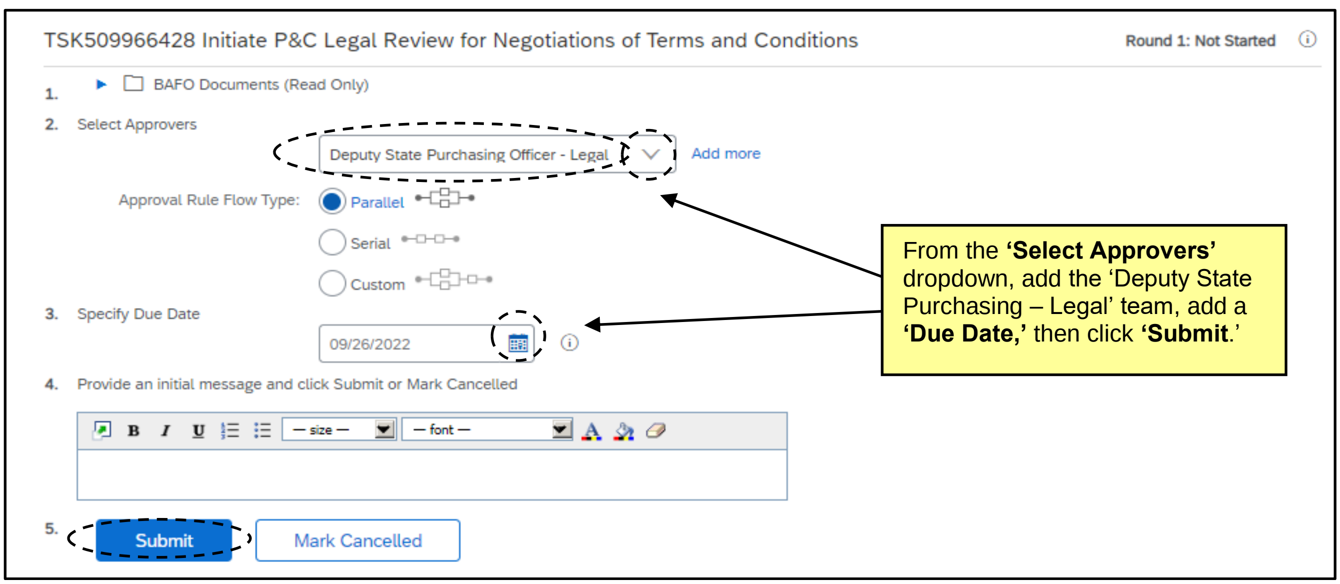
9. Unless the **'Est. Total Contract Value (incl. Renewals)'** amount is over one million dollars, P&C Legal will not automatically be able to see the Sourcing Project, so they'll have to be manually added. Navigate to the **'Team'** tab and click the **'Actions'** button in the top right, then select **'Edit'** from the dropdown. On the subsequent page, click **'Add more'** next to the **'P&C Approver Team #X'** group, and select **'Search more'** from the dropdown in the **'Members'** box. Search for **'Deputy State Purchasing Officer – Legal,'** check the box to the left, and add that group to the **'Team'** tab by clicking **'Done'** and then **'OK.'**



10. Navigate to the **'Documents'** tab and click the blue arrow to the left of the **'BAFO Documents'** folder. Download, complete, and replace the **'Request for BAFO Template'** document, and upload any additional requisite documents into that folder per P&C's review. Additional documents could include a Negotiation Rationale Memo, the vendor's original response, and any Exceptions Information.



11. When all documents have been loaded to the **'BAFO Documents'** folder, navigate to the **'Tasks'** tab and click the **'Initiate P&C Legal Review for Negotiations of Terms and Conditions'** task. Select **'View Task Details'** from the dropdown, and on the subsequent **'Approval Task'** page, add the **'Deputy State Purchasing Officer – Legal'** group to the **'Select Approvers'** field. Specify a due date from the date picker, add a note if necessary, and click the **'Submit'** button to send the task to P&C Legal for approval.



12. Once P&C Legal has reviewed the submitted documentation and approved the task, it will automatically update to **'Approved'** status on the **'Tasks'** tab, and a checkmark will appear to the left. The user can now move on to the next task to **'Gain P&C Preliminary Approval of BAFO'** before they send a BAFO request to any applicable vendors. If the user just completed the Terms and Conditions task, their documentation should be set, pending any suggested updates provided by P&C Legal were made, but if the user is requesting a BAFO with no relation to Terms and Conditions, they should follow the instructions outlined in **Step 10** to replace the **'Request for BAFO Template'** document and add the Original response and Negotiation Rationale Memo to the **'BAFO Documents'** tab.

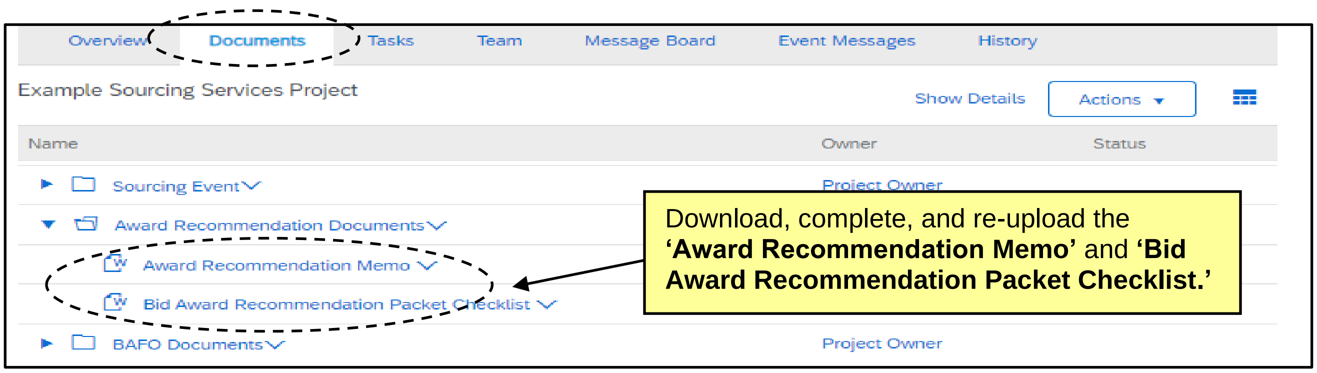
13. When all documents have been loaded to the **'BAFO Documents'** folder, navigate to the **'Tasks'** tab and click on the **'Gain P&C Preliminary Review of BAFO'** task, select **'View Task Details'** from the dropdown, and add the appropriate P&C Service Team from the drop down in the **'Select Approvers'** section. Set a due date from the date picker, add a note if necessary, and click **'Submit'** to send the task to P&C for approval.

14. Once P&C has reviewed the submitted documentation and approved the task, it will automatically update to **'Approved'** status on the **'Tasks'** tab, and a checkmark will appear to the left. The user can now proceed to request a BAFO from a specific vendor(s) via the Event **'Messages'** tab. The request will begin with a targeted message as demonstrated in **Steps 5-7** above, but the user should attach a **'Request for BAFO'** form instead of a **'Request for Clarification'** form.

V. Send Award Recommendation to P&C for Approval

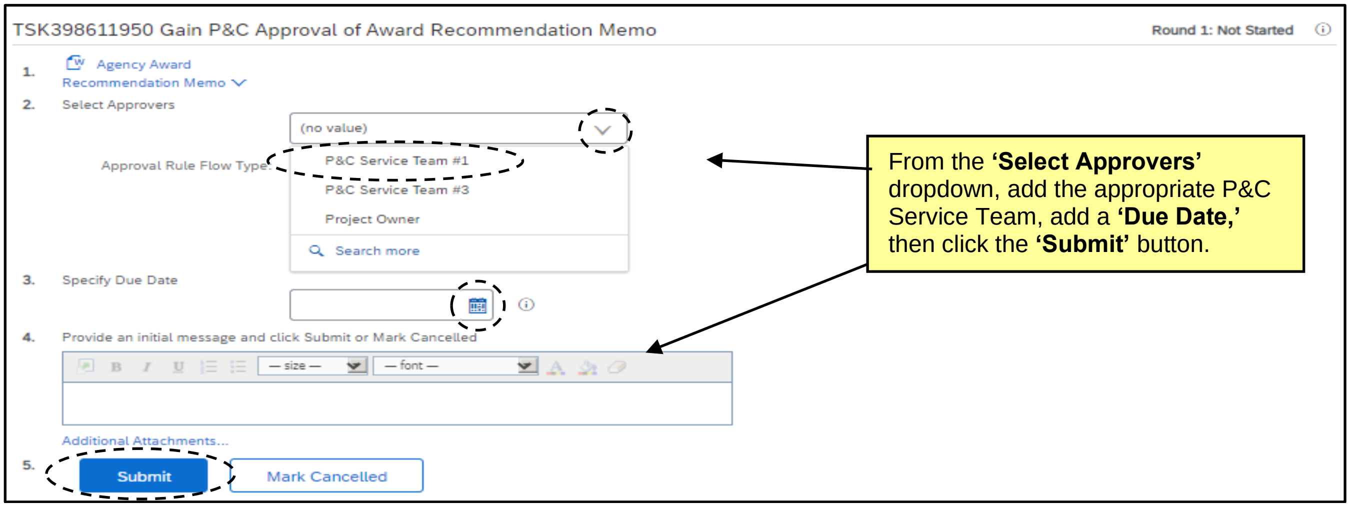
After all information has been received and considered, the user can develop an **'Award Recommendation Memo'** and post the final Bid Tabulation and Award Notification on eVP. If the solicitation was previously approved by P&C, the **'Award Recommendation Memo'** will also need to gain P&C approval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

1. Once all the information has been gathered from the Event and all input has been considered, the user can go to the **'Documents'** tab on the Project and download the **'Award Recommendation Memo'** from the **'Award Recommendation Documents'** folder. It should be completed with information about the recommended winning bid, and the template should be replaced with the completed version. The user should also do this for the **'Bid Award Recommendation Packet Checklist,**' the template for which can be found in the same folder. Any other relevant supporting documents should be uploaded into this folder if necessary



2. Navigate to the **'Tasks'** tab and click on the **'Gain P&C Approval of Award Recommendation Memo'** task in **Phase 06** and select **'View Task Details'** from the drop down.

3. On the subsequent **'Approval Task'** page, select the appropriate P&C Service Team from the drop down in the **'Select Approvers'** section. Users should not have to search for it after having recently added it in the previous approval task. Add a **'Due Date'** from the date picker, include a short note to P&C if desired, then click **'Submit'** to send the approval request to P&C.

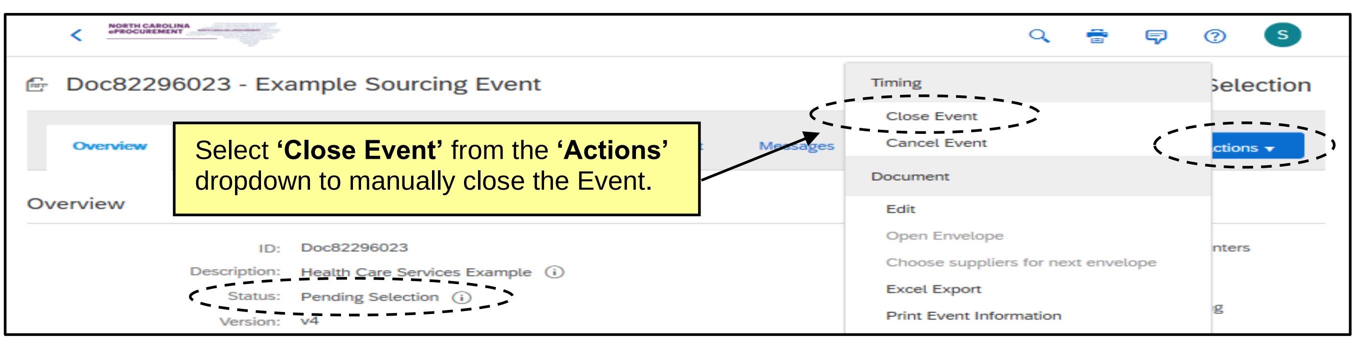


4. After P&C reviews and approves the **'Award Recommendation Memo,'** the task will automatically update to **'Approved'** status and a checkmark will appear to the left. The user can now proceed through the remaining steps to officially award the solicitation.

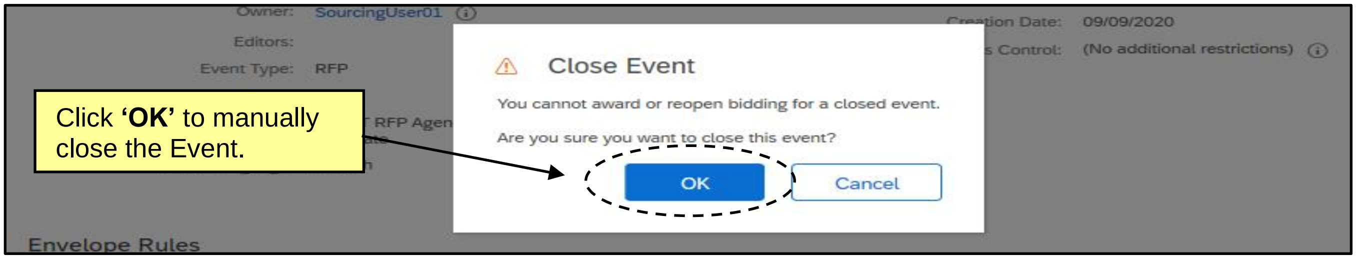
VI. Completing the Sourcing Event and Project

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

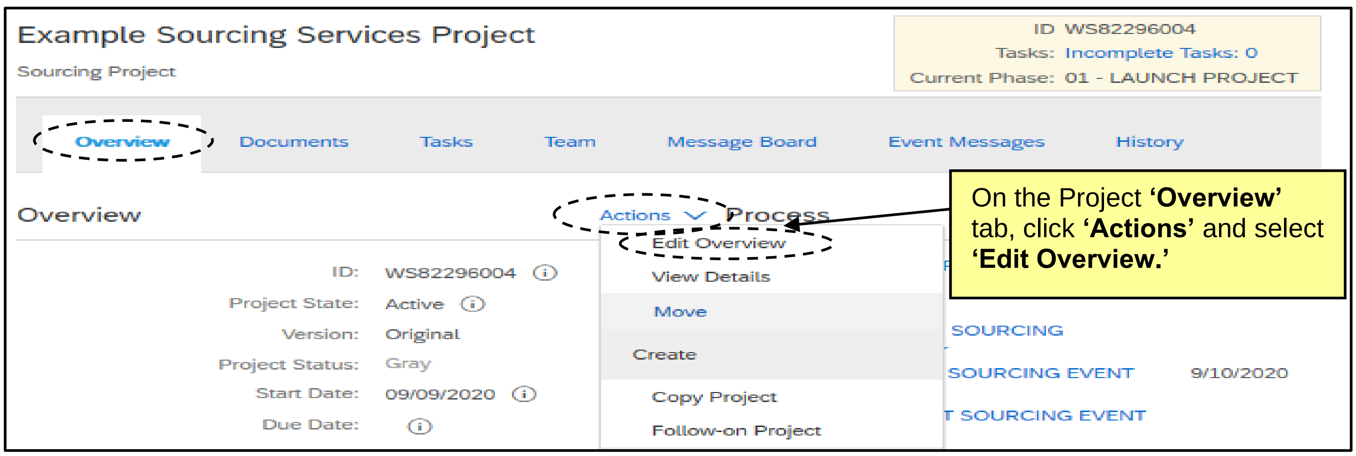
1. Once the solicitation has been officially awarded and notification has been posted to eVP, return to the Event to close it. Even though an award has been issued, the status will still read **'Pending Selection'** because the award was determined outside of the Event. To manually close the Event, click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



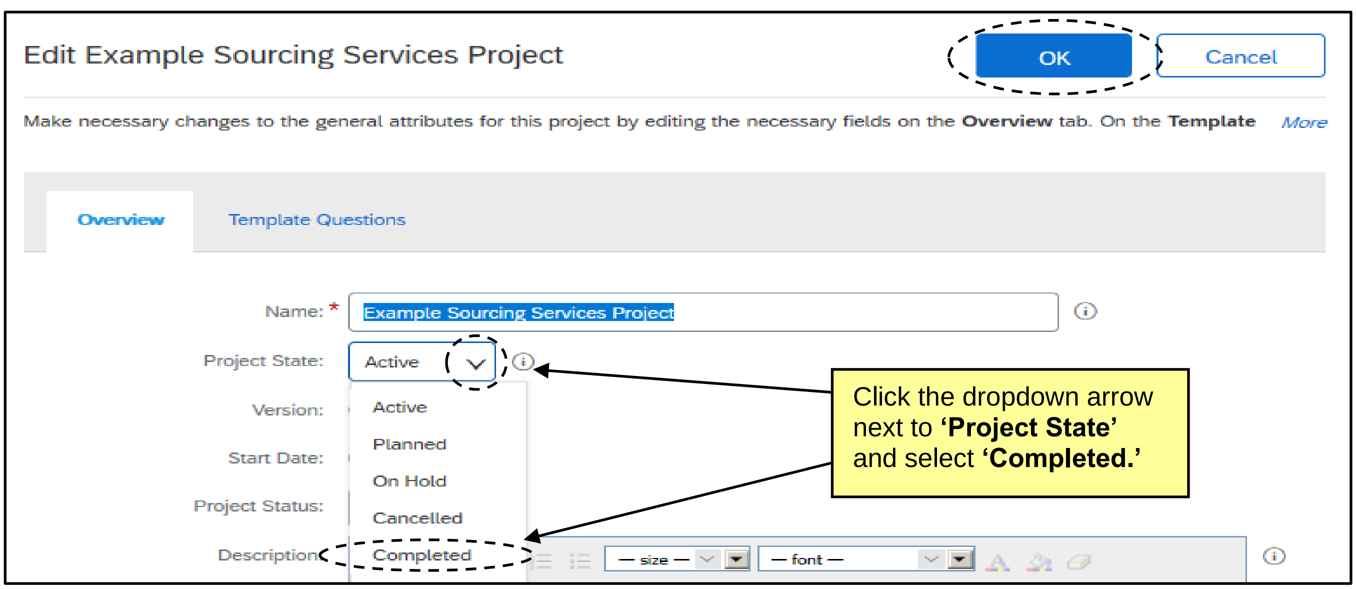
2. The **'Close Event'** warning will display reminding the user that **'Closed'** Events cannot be reopened, which is okay because they can still be accessed for important historical information. Click **'OK.'**



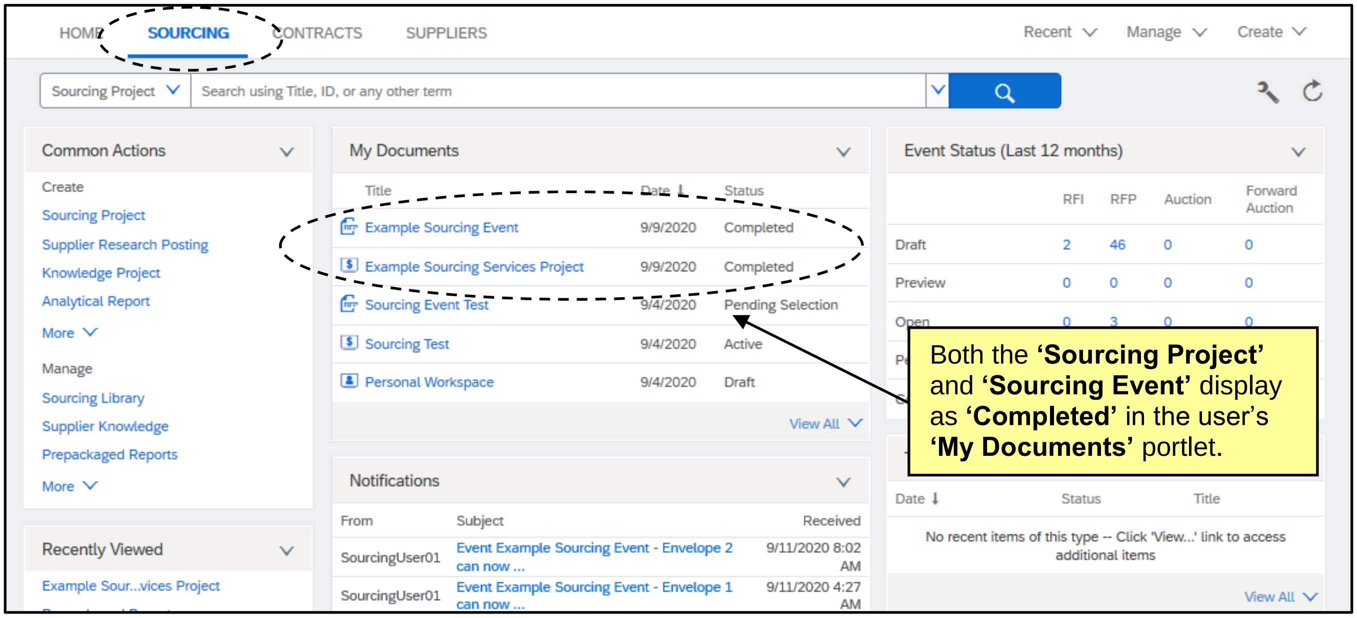
3. The Event status will update to **'Completed.'** Now navigate back to the **'Overview'** tab of the Project to mark that as **'Completed,'** too. Click **'Actions'** at the top of the **'Overview'** tab and select **'Edit Overview'** from the dropdown menu.



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



5. The Status of both Project and 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.



VII. 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 user 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 user 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.

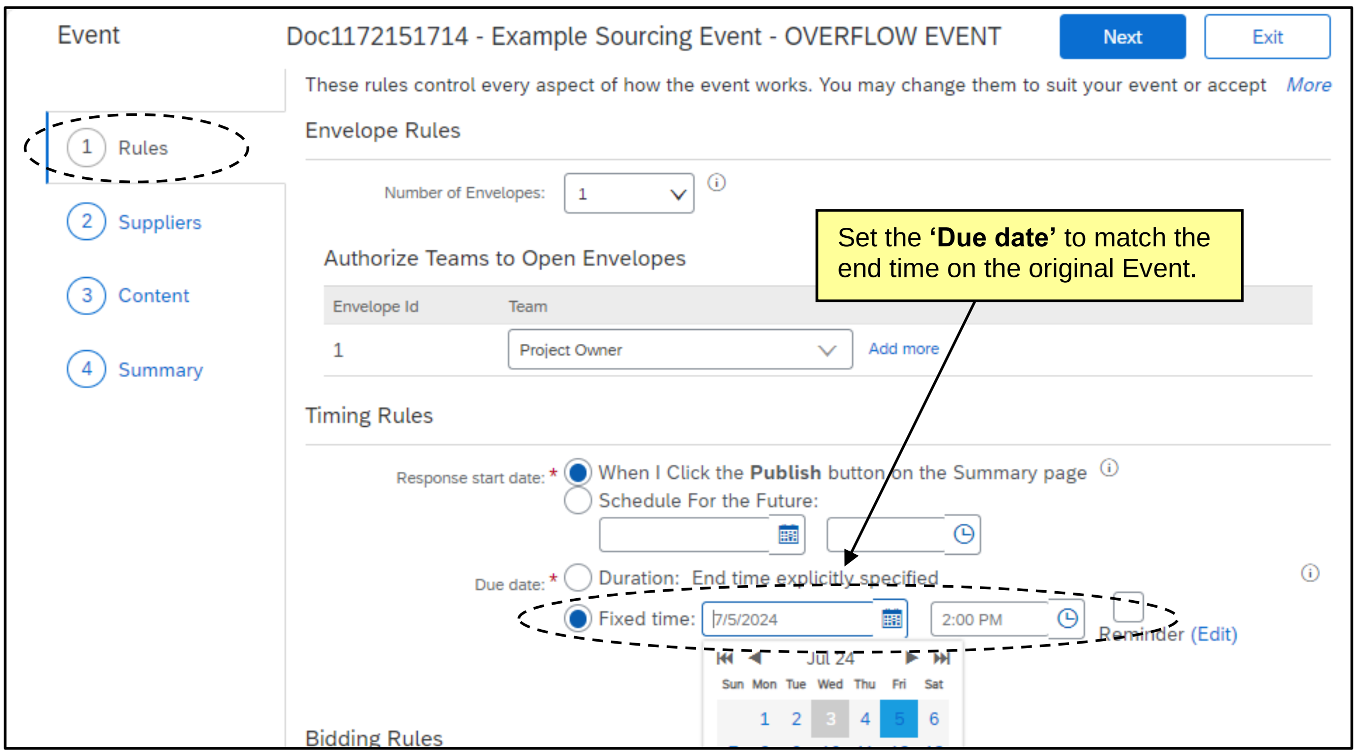
1. From the original Sourcing Event approaching 100 supplier responses, click on the **'Actions'** button in the top right and select **'Copy'** from the dropdown.

2. At the top of the subsequent screen, provide a **'Title'** for the Overflow Event. It is advised that the user include "OVERFLOW EVENT" at the end of the title.

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

4. The user 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.

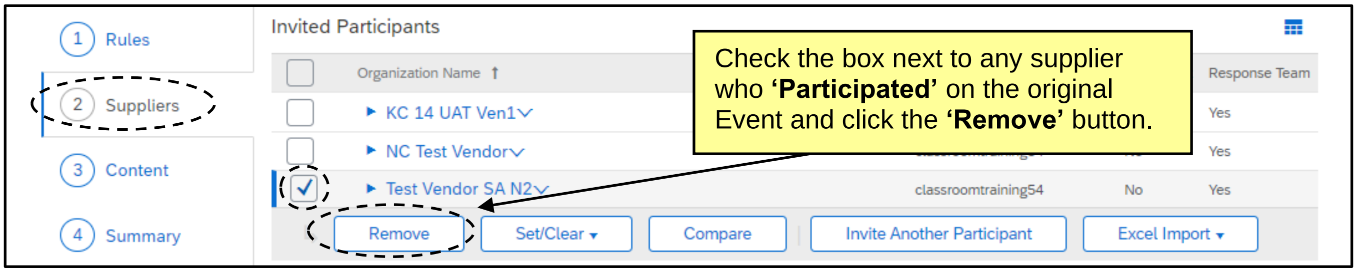


5. Navigate to the **'Content (3)'** section and assure that all content and documents copied over from the original Event matches up as expected.

6. In the **'Suppliers (2)'** section, the user 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 user 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.



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

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 user 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 user will need to review the responses received in both Events.