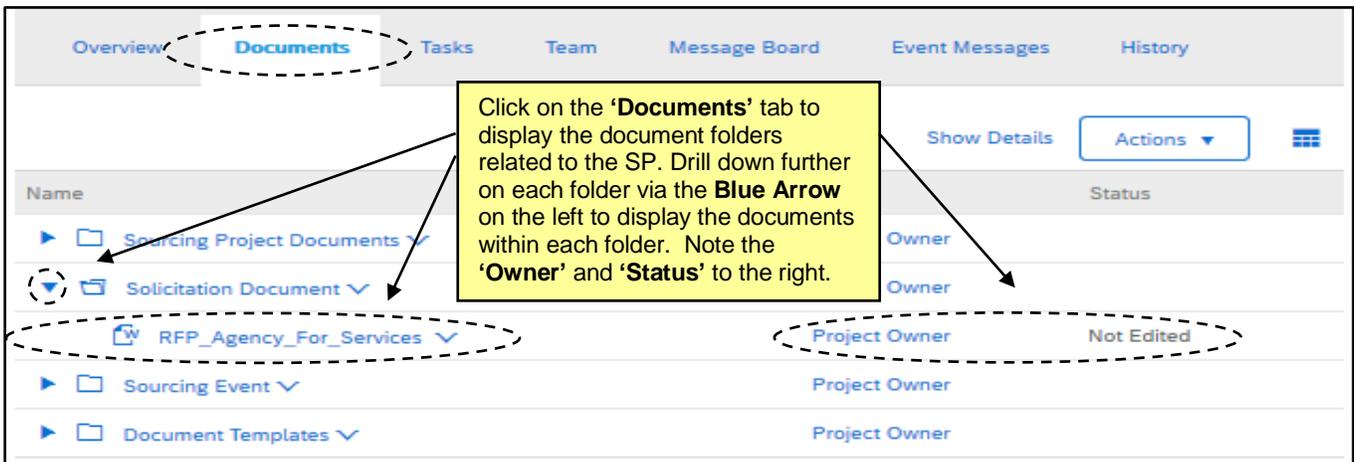# NC eProcurement
Editing a Document

Within a Sourcing Project (SP), the **'Documents'** tab is a central storage location for all documents related to the Solicitation. It houses the associated **'Sourcing Project Documents,'** **'Solicitation Documents,'** and the **'Sourcing Event,'** which serves as the main vehicle for communication with vendors. The instructions below are meant to guide users to modify the **'Solicitation Document'** within the tool and review changes made to the Sourcing Project, but the same actions can be taken to modify any Project documents.

I.   Accessing Documents

1. Open a Sourcing Project and click on the **'Documents'** tab, noting the folder structure as defined by the template selected during the creation of the SP. Click on a **Blue Arrow** to drill down for more options. The document's **'Owner'** and **'Status'** are listed to the right of each item.

Click on the **'Documents'** tab to display the document folders related to the SP. Drill down further on each folder via the **Blue Arrow** on the left to display the documents within each folder. Note the **'Owner'** and **'Status'** to the right.

2. To access the **'Solicitation Document,'** click on the **Blue Arrow** to the left of **'Solicitation Document.'** Next, click the arrow to the right of the **MS Word** document titled **'RFP_Agency_For_Services'** to display the drop-down menu and select **'Download.'**

    Note: The specific document template found within the **'Solicitation Document'** folder will vary depending on the **'Solicitation Vehicle'** that is selected while entering the Sourcing Project Attributes. For this example, the selected **'Solicitation Vehicle'** is **'RFP_Agency_For_Services.'** For more details on **'Sourcing Project Attributes,'** refer to the ['Creating a Sourcing Project'](#) Job Aid.

Clicking the arrow (slightly obscured in this image) to the right of the **'RFP_Agency_For_Services'** document displays a drop-down menu. Select **'Download'** to download a local copy of the document to your computer for editing.

NC eProcurement
Editing a Document

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

II. Modifying a Document in MS Word

1. Open the downloaded document in **MS Word**.

2. Users will see a template for the **'RFP_Agency_For_Services'** and they should modify it as appropriate per the needs of the solicitation. Users should NOT modify any legal verbiage, but rather, simply fill in applicable information where the template has left a blank underline. Due to the default settings of **'Track Changes'** within the **MS Word** document, deleted content will appear in strikethrough red text, while added content will appear in underlined red text.
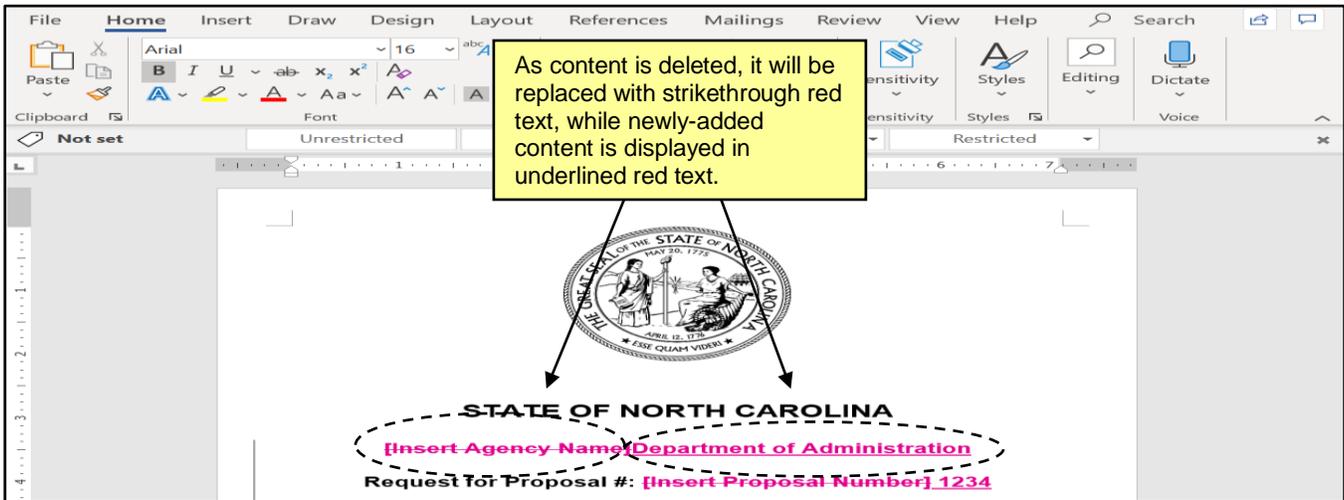
3. For users editing an already-modified document in a **'Reviewer'** role, it may be helpful to further utilize **'Track Changes.'** Click the tab at the top of the toolbar labeled **'Review.'** On the right-hand side of the tool bar, there is a column marked **'Changes'** at the bottom. From this view, users can review the changes (as indicated by the red text) one at a time using the icons with the blue arrow.

    For each change, if the reviewer believes the change to be appropriate, they can accept the change by selecting the **'Accept'** button and choosing to approve that specific change. If desired, a reviewer can review the entire document and then select **'Accept All changes.'** After accepting a change, the strikethrough and colored text that indicates a change will disappear. To see the document without the red text, click the drop-down next to **'All Markup'** and select **'No Markup'** instead.

,
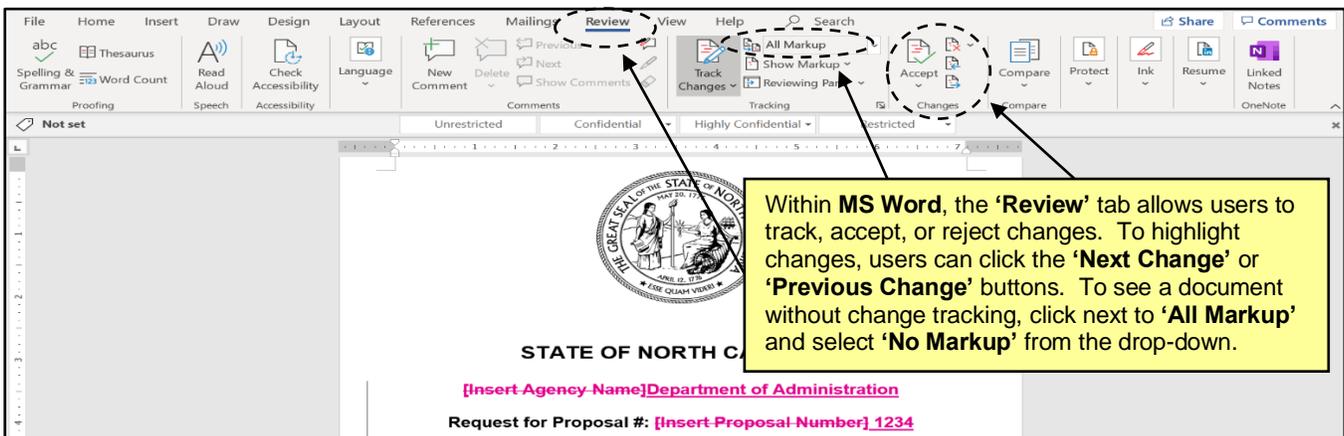
4. Following all necessary edits and additions to the **'RFP_Agency_For_Services'** file, save the file to the computer for upload to the Sourcing Project. To begin the upload, click the arrow to the right of **'RFP_Agency_For_Services'** and select **'Replace Document.'**

| Overview | Documents | Tasks | Team | Message Board | Event Messages | History |

Show Details   Actions ▼

Name	Action						tatus
► ☐ Sou	**Download**					
▼ ☐ Sol	View Details			By selecting **'Replace Document,'** users can overwrite the existing document. This guarantees strict version control so that only the correct version is sent for reviews, approvals, and signatures.		
☐W	Edit Attributes					ot Edited
► ☐ Sou	Copy				Project Owner	
► ☐ Doc	Move				Project Owner	
	Publish					
PM	NC eProcuremer	Create Shortcut				
ement Participar	Replace Document				© 1996 - 2020 Ariba Inc. All Rights Reserved

5. When replacing the document with the modified version, users may drag and drop the file from their computer or select the file directly by clicking the **'Choose File'** button. If desired, a user can also enter a description of the edits they've made to the document in the **Description** box.

To finalize the upload, click the **'Replace'** button. The '**Document Details**' page will display. Users will see the **'Overview,'** which breaks the details of the document, and note a tab for the '**Version History**.'

| HOME | **SOURCING** | CONTRACTS | SUPPLIERS | | Recent ▼   Manage ▼   Create ▼ |

Replace Document

Choose a document to replace the **Original Document** and enter a **Description** to explain why the document is being replaced. You can replace the Original Document _More_

Original Document: ☐W RFP_Agency_For_Services.docx

Description:

Users can add a description of changes made to the document. To replace the document, users can select the file directly, or drag-and-drop from their computer directly into the drop box, and then hit **'Replace.'**

New Document: ◉ Upload

Browse...

RFP_Agency_For_Services.docx

○ Replace original document with a document from a project

Replace   Cancel