

# NC eProcurement

## Sourcing Project Quick Guide

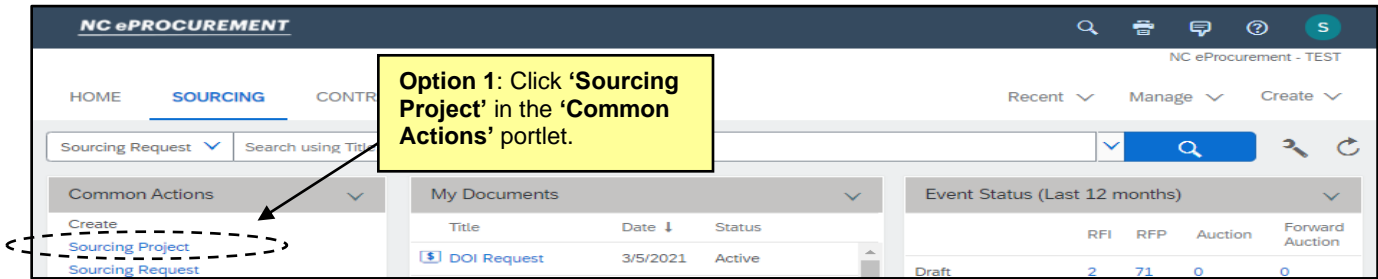


This Sourcing Project Quick Guide is intended to outline the straightest path through the process of creating a Sourcing Project and publishing its Sourcing Event. More detailed information on Sourcing Projects and Events can be found in their full, respective Job Aids.

A Sourcing Project (SP) is a container for all information and documents pertaining to a formal solicitation for bids on goods or services. A Sourcing Event is the most important part of a Sourcing Project and is the electronic forum for vendors to respond to the solicitation with their bids.

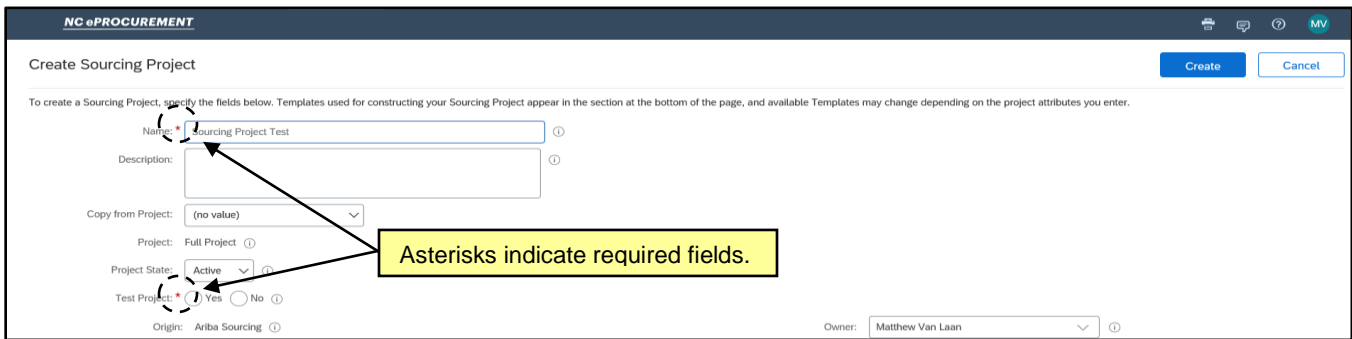
### I. Initiate Sourcing Project and Enter Attributes

1. Click the **'Sourcing Project'** link under the **'Create'** header in the **'Common Actions'** portlet on the left side of the screen,

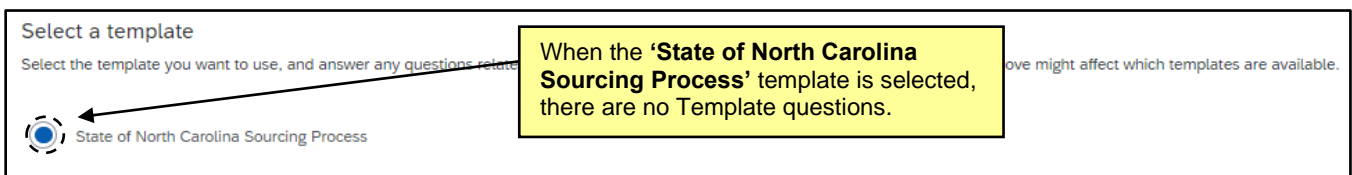


2. The **'Sourcing Project Attributes'** page will display. Populate all relevant fields, including the seven required fields, as noted by an asterisk (\*).

**Note:** It is advised that users select **'Lite Sourcing'** from the **'Execution Strategy'** dropdown.



3. In the **'Select a template'** section of the SP Attributes page, note the radio button next to the **'State of North Carolina Sourcing Process'** template is automatically selected.



4. Click the **'Create'** button on the top or bottom right of the screen.

## II. Navigate to the Team Tab and Confirm Sourcing Team Members

After clicking 'Create' on the **Sourcing Attributes** page, the Sourcing Project (SP) is saved and the 'Overview' tab is displayed. Users should navigate to the 'Team' tab and add any other users they want to have access to the SP. By default only the user who clicked 'Create' can see this SP.

1. On the 'Team' tab, click on 'Actions' and select 'Edit' from the dropdown to add other users as members to the preloaded groups.

**Note:** Users added to the 'Project Owner' group will be able to edit the SP, not just view it.

From the 'Team' Tab, click on the specific 'Project Group' name or 'Project Member' name for more details on who is in each 'Group.'

To edit any 'Project Groups,' click on 'Actions' and select 'Edit' from the drop-down menu.

Group ↑	Members
Agency Director	(no value)
Agency Internal Approver	(no value)
Budget Approver	(no value)
Evaluation Committee	(no value)
P&C Approver	State Purchase and Contract Approver - For Contract approval on
Project Owner	SourcingUser01
Subject Matter Advisors	(no value)

2. On the 'Team' page, change a 'Team Member' by clicking on the down arrow in the 'Members' box or click on 'Add more' to include other users. There is also an 'Add Group' button that will allow for additional 'Team Groups' to be added. When all changes have been made, click 'OK.'

**Note:** Any changes made to the 'Team' tab within a SP only apply to that SP and not to other SP's also created by the same user.

Click the down arrow to change a 'Group Member' or 'Add More' to add other users to a 'Project Group.' Click 'OK' when done.

Group ↑	Members
Agency Director	▼
Agency Internal Approver	(no value) ▼
Budget Approver	(no value) ▼
Evaluation Committee	(no value) ▼
P&C Approver	State Purchase and Contract Approver - For Contract approval on ▼ Add more

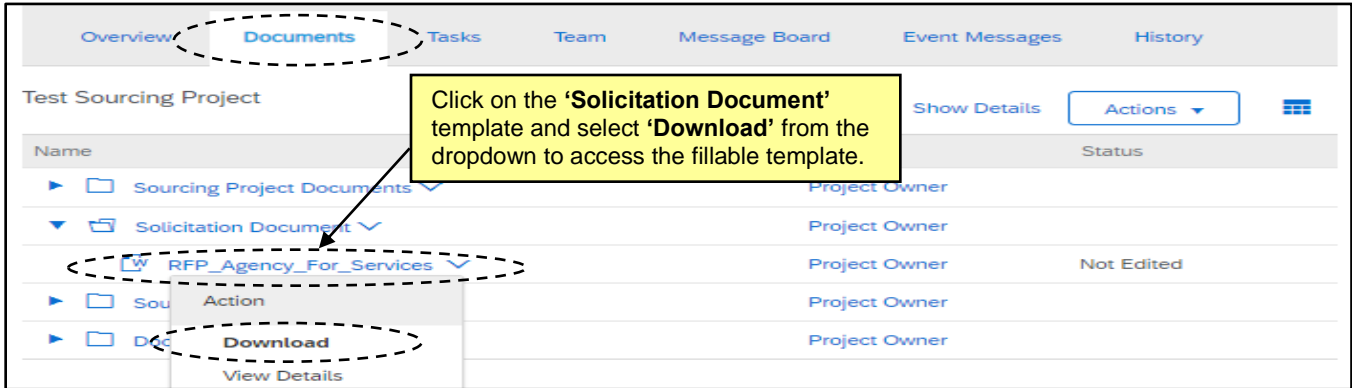
## III. Navigate to the Documents Tab for the Solicitation Document and Sourcing Event

The 'Documents' tab is a central storage location for all documents related to a Sourcing Project (SP). By default it includes folders for the 'Solicitation Document' and 'Sourcing Event.' Users can find the template provided for the Solicitation Document in the 'Solicitation Document' folder. In order to complete the Solicitation Document, users will need the Event's 'Document Number,' so the Solicitation Document and Event should be worked on simultaneously.

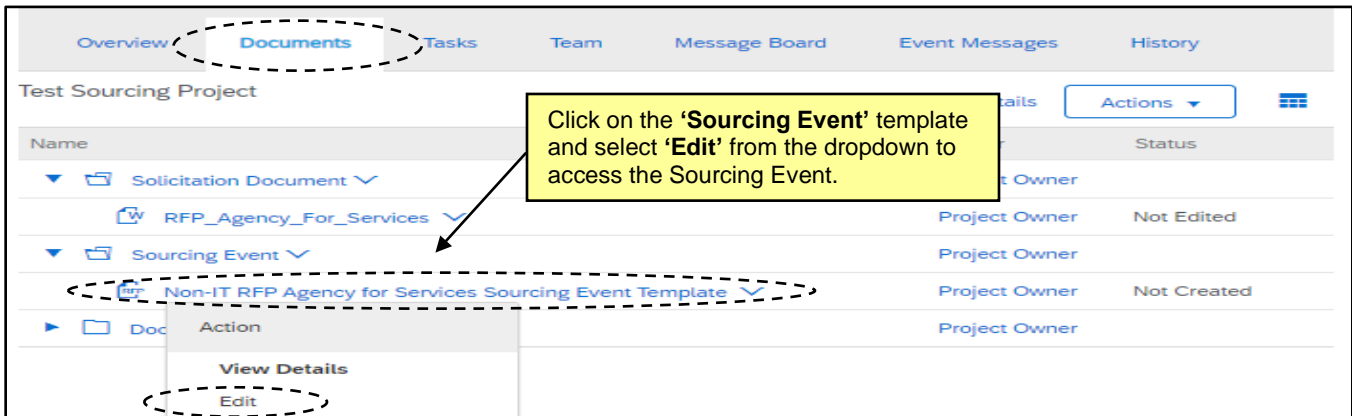
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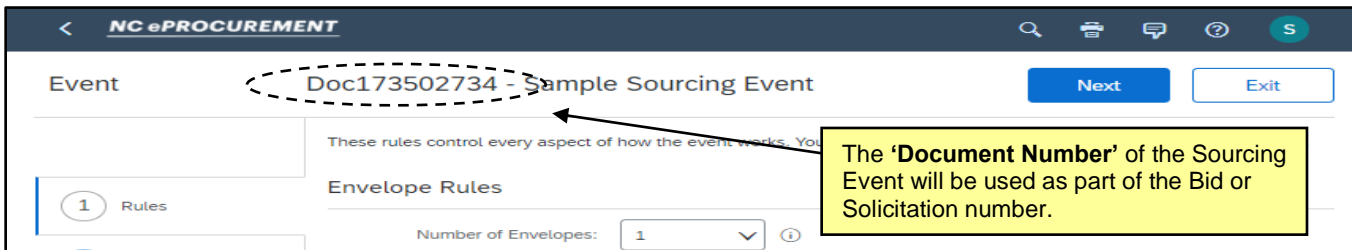
1. To download the Solicitation Document template provided by the state, select **'Download'** from the dropdown that appears after clicking on the Solicitation Document template. Open the template and begin editing.



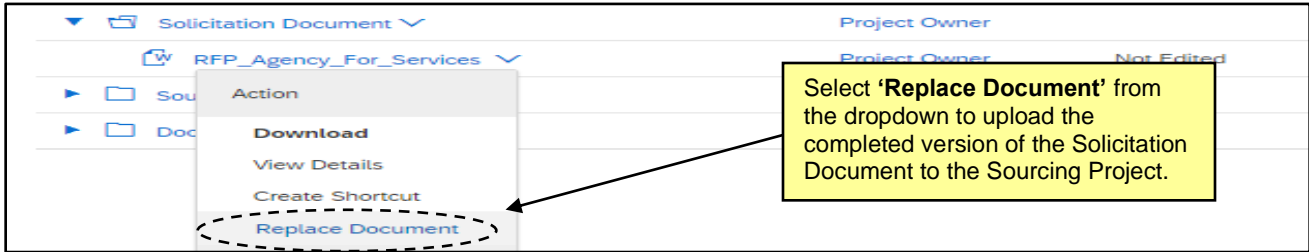
2. Click on the Sourcing Event template in the **'Sourcing Event'** folder and select **'Edit'** from the dropdown.



3. After adding a **'Title'** and **'Description'** on the subsequent **'Edit Event'** page and clicking **'OK,'** note the **'Document Number'** beginning with **'Doc.'** This number will be used as part of the Bid or Proposal Number to be included on the first page of the Solicitation Document as well as entered into IPS per P&C guidelines. Users only need the nine-digit number and can omit the leading **'Doc.'** When this number has been captured, click **'Exit,'** and select **'return to project'** on the subsequent screen.



- When the Solicitation Document has been finalized, return to the **'Documents'** tab, click on the Solicitation Document template once again, and select **'Replace Document.'** Follow the steps on the subsequent pages to **'Replace document by the updated file'** and click **'Save.'**

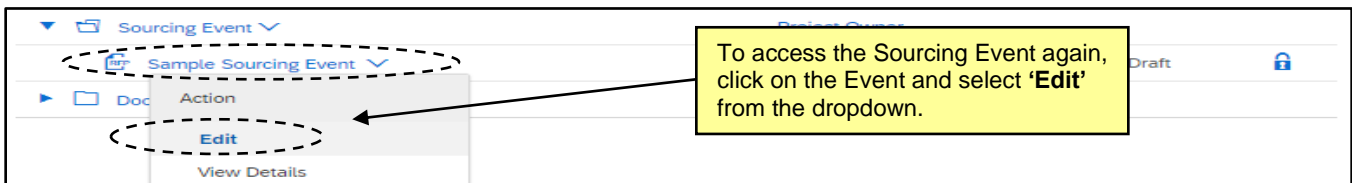


### IV. Edit Sourcing Event to Complete Sections 1 (Rules) and 3 (Content)

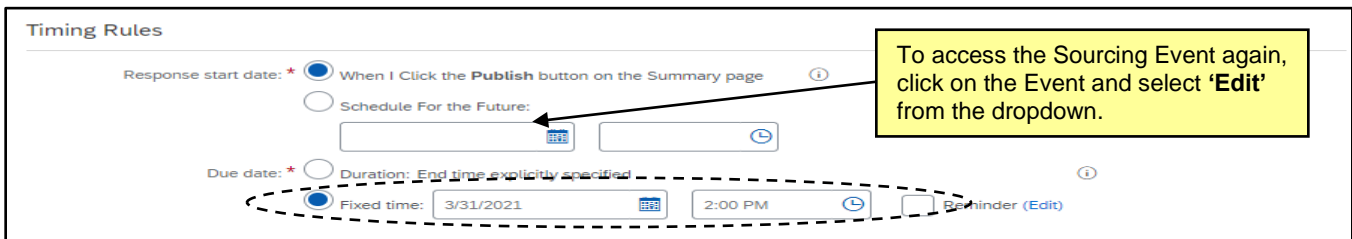
The Sourcing Event is the interactive part of the Sourcing Project (SP) where vendors can provide their responses. **Section 3 (Content)** is the most important part of Event. Users will load their completed Solicitation Document here for vendors to download and respond to in **subsection 3.1**. Also, users may need to generate a Pricing Document to load for the vendor in **subsection 5.1**.

The Solicitation Document template is much shorter than Solicitation Documents used in the past because the Event contains several question fields for vendors to provide answers that used to be collected in the Solicitation Document itself. Users have the option to include other attachments for vendors to fill out and return, such as a HUB Identification form or any other forms to collect vendor information. Users may also need to adjust or even delete Content questions that don't apply to their Solicitation Document.

- From the **'Documents'** tab, click on the renamed Sourcing Event and select **'Edit'** from the dropdown to return to the Event.



- Section 1 (Rules)** of the Event will display. Under **'Timing Rules,'** set the **'Due date'** field to **'Fixed time'** and select the date and time for vendor bids to be due established in the Solicitation Document.

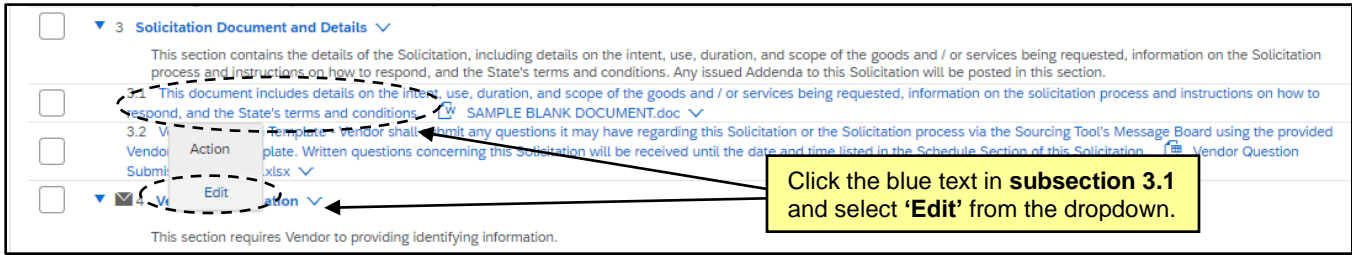


- When the **'Due date'** has been set, click onto **Section 3 (Content)** on the left side of the screen.

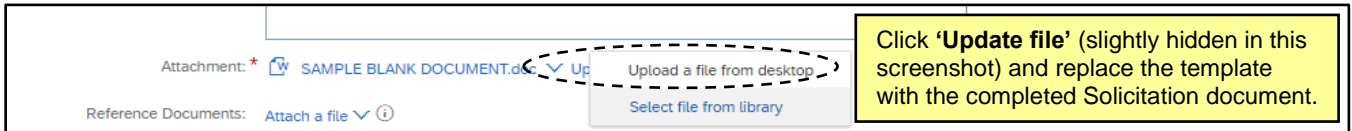
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4. Scroll to **subsection 3.1** and click on the blue text in that field. Select **'Edit'** from the dropdown menu.

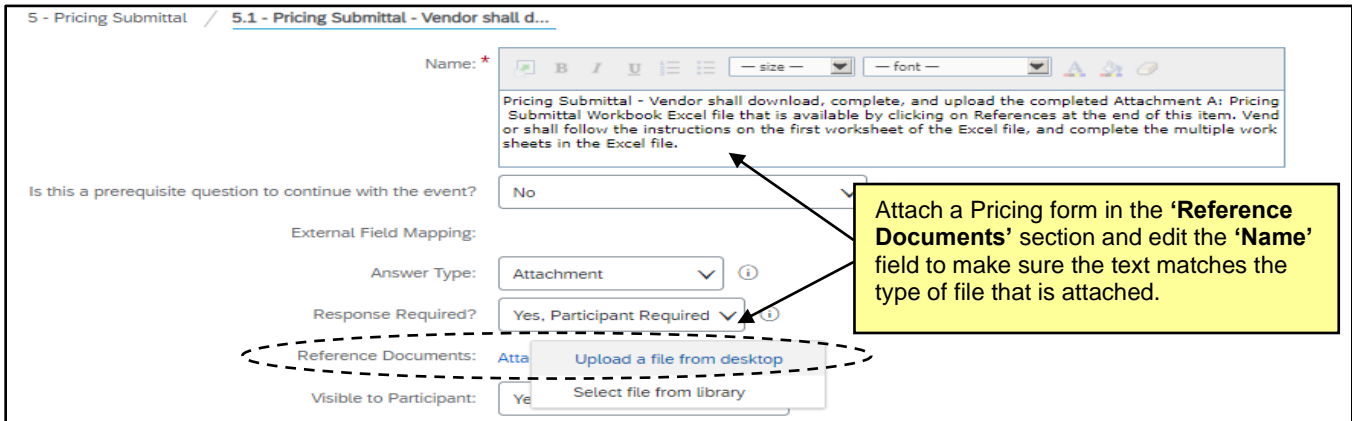


5. Click the **'Update file'** link and select **'Upload a file from desktop'** to replace the sample document with the finalized Solicitation Document. If the wording in the **'Description'** field does not accurately reflect the nature of the solicitation, that may be edited, but it is designed to match the template version.

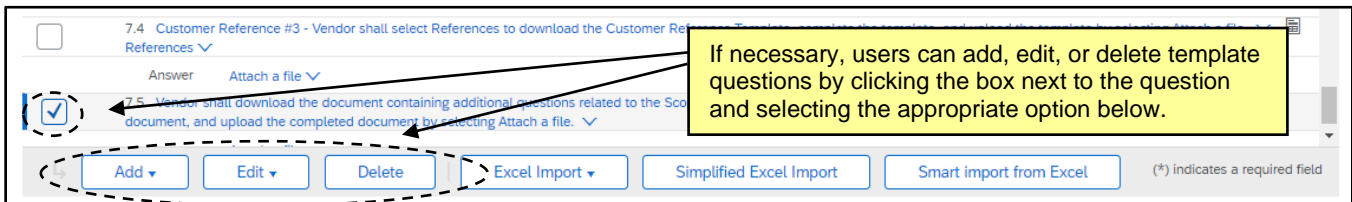


6. Scroll down to **subsection 5.1** and click on the blue text in that field. Select **'Edit'** from the dropdown menu as shown above in **Step 4**. Click on the **'Attach a file'** link in the **'Reference Documents'** field and select **'Upload a file from desktop.'** This file will serve as a Pricing form for the vendor to fill out and return with the pricing offered on their bid.

**Note:** The default language in the **'Name'** field lists this document as an **'Excel'** file. If it is a different type of file, like a **'Word'** document, edit that wording to accurately reflect the document type.



7. Review the rest of the Content sections and subsections to make sure that any questions accurately reflect the nature of the Solicitation Document. Questions can be added, deleted, or edited as necessary by checking the box next to the subsection in question and clicking the appropriate button below.



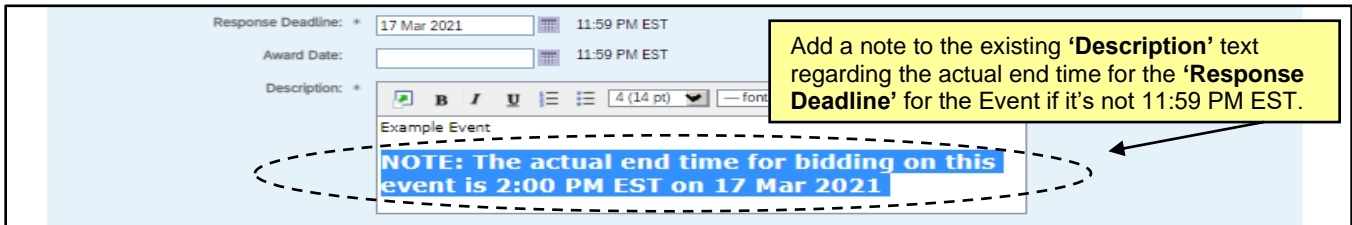
- If the Sourcing Event needs to be approved before publishing, users should click the **'Exit'** button in the top right after finalizing all updates to **Section 3 (Content)** and select **'return to project.'** The **'Gain Approval of Sourcing Event'** task in **Phase 04** on the **'Tasks'** tab can route that Approval Task internally for the user. If no approvals are necessary, proceed to the following steps.

## V. Complete Sections 2 (Suppliers) and 4 (Summary) to Publish the Event

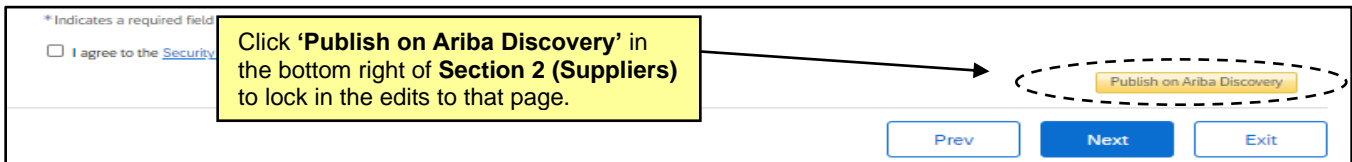
**Section 2 (Suppliers)** will guide the user to **'Create a Supplier Research Posting.'** When all required information has been added to this section, the user will click the yellow **'Publish on Ariba Discovery'** button at the bottom of the page. The last step is to review the Event before clicking **'Publish'** on **Section 4 (Summary)**.

- If there was no need for an approval, click directly onto **Section 2 (Suppliers)**. If the user needed to wait for an Approval to proceed, once the Approval is complete, click back onto the Event from the Documents tab and select **'Edit'** from the dropdown before clicking onto **Section 2 (Suppliers)**.
- Populate or edit all relevant fields including the six required fields, as noted by an asterisk (\*). Some fields will be pre-populated with information from elsewhere in the Sourcing Event.

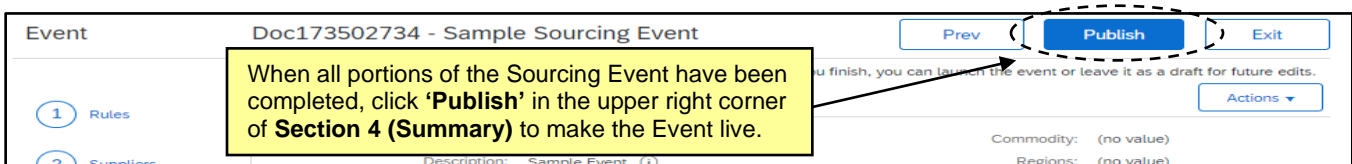
**Note:** The **'Response Deadline'** field will show a default end time for the bidding **'Due Date'** as 11:59 PM EST, and this cannot be edited. To make it clearer to the vendor what the actual bidding end time is, the user should add a note in the **'Description'** stating the previously established, actual end time for the Sourcing Event and accentuate the note by enlarging, bolding, and highlighting the text if desired.



- When all fields have been completed, click the **'Publish on Ariba Discovery'** button in the bottom right of the page to lock all the edits in. If users navigate away from **Section 2 (Suppliers)** before clicking this button, any updates will be lost.



- Click onto **Section 4 (Summary)**. If all required aspects of the Event have been completed, the **'Publish'** button will be blue and clickable. If there are still incomplete aspects, it won't be clickable and a message should alert the user to what's missing. Scroll down to review this page to make sure all information is accurate before clicking **'Publish.'** If edits are necessary, click the **'Actions'** dropdown to edit the **'Overview,'** or return to any of the Sections to make changes there. Any changes after clicking **'Publish'** would need to be made in the form of an addendum.





## VI. Post Sourcing Event Summary and Link to Sourcing Event on IPS

Users can return to a published Event by selecting the option to **'Monitor'** it, either directly after they click **'Publish'** or any other time via the Event within the **'Documents'** tab. The first thing a user should do on their published Event is to navigate to the newly created **'Discovery Suppliers'** tab where they can copy the **'Public Posting'** URL to paste it in the **'NCEP URL'** field within their IPS posting. Vendors wishing to respond to the solicitation will then follow that URL to access and respond withing this Sourcing Event.

1. Return to the Event by selecting the **'Monitor'** option.
2. Click on the **'Discovery Suppliers'** tab and copy the URL in the **'Public Posting'** field. Go to IPS and populate the Solicitation Posting as instructed by P&C.

**Note:** The copied URL should be pasted in the **'NCEP URL'** IPS field.

The screenshot shows the Ariba Discovery Suppliers interface for a sourcing event titled "TEST DISCOVERY PROJECT DO NOT RESPOND - NCEP - 4". The event is marked as "Closed - No additional responses allowed". The interface includes a navigation bar with tabs: Overview, Content, Suppliers, **Discovery Suppliers** (highlighted with a dashed circle), Messages, Log, Scenario, and Actions. Below the navigation bar, the event details are displayed, including the State of North Carolina logo, posted on date (21 Jul 2020), open for bidding date (21 Jul 2020), and response deadline (29 Jul 2020 8:59 PM PDT). A statistics bar shows 16 Views, 0 Seller Responses, 0 Q&A, and 513 Sellers Notified. A yellow callout box with a black border points to the "Public Posting" field, which contains the URL "http://discovery.ariba.com/rfx/8637214". The callout box contains the text: "From the 'Discovery Suppliers' tab on the Sourcing Event, copy the 'Public Posting' URL to paste in IPS." The "Public Posting" field is also highlighted with a dashed circle. Other details include Opportunity Amount: Less than \$1000 USD, Response Deadline: 29 Jul 2020 8:59 PM PDT, Posting ID: 8637214, Suppliers Invited: 0, Posting Type: Request for Information, and Privacy: Participating supplier list hidden. A note at the bottom states: "Company name hidden. Company alias (Ariba Discovery Buyer) will be displayed." and "Contact name hidden".