NC eProcurement Sourcing Project Quick Guide

STATE DEPARTMENT STATE BRANCE.
LOCAL GOVERNMENT CITY COUNTY
COMMUNITY COLLEGE PUBLIC SCHOOLS 1
NORTH CAROLINA ePROCUREMENT PURCHAS
ONLINE SHOPPING STATEWIDE TERM CONTRACTS
ELECTRONIC VENDOR PORTAL HUB CERTIFIED V
DUOTE PUNCHOUT CATALOG
TERCIAL PURCHASE ORDER
SOURCING
BIDDING
BUY
201

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.

HOME SOURCING CONTRACT	S Click 'Sourc	ing Project	in the		Recent	\sim	Manag	ge 🗸	Create 🗸
Sourcing Request V Search using Title, ID,						~		۹	~ C
Common Actions	My Documents			\sim	Event Status (La	st 12 r	nonths)		\sim
Create	Title	Date 🖡	Status			RFI	RFP	Auction	Forward Auction
Sourcing Request	DOI Request	3/5/2021	Active		Draft	2	71	0	0

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

Note: Selecting 'Lite Sourcing' from the 'Execution Strategy' dropdown is most common.

Create Sourcing Project			Create	Cancel
To create a Sourcing Project, specify the fields below. Templates used for constructing yo	ur Sourcing Project appear in the section at the bottom of the page, and a	vailable Templates may change depending on the project attributes you enter.		
Name: * Bourcing Project Test	6			
Description:	0			
Copy from Project: (no value)				
Project: Full Project ①		1		
Project State: Active 0 Active Astronomy Organization Astronomy	erisks indicate required fields.			

3. In the 'Select a template' section of the Create Sourcing Project page, note the radio button next to the 'State of North Carolina Sourcing Process' template is automatically selected. From the dropdown next to the 'What is the type of solicitation?' question, select either 'IFB' or 'RFP' depending on the nature of the solicitation.

Select a template Select the template you want to use, and answer any questions related to it to create your project.			ed to it to create your project. H	Select a solicitation type from	· available.
\bigcirc	State of North Carolina Sourcing F	Process		the dropdown and click 'Create.'	
	Use this Process Template for a	ll Solicitation Types.	· · ·		
	What is the type of solicitation?	Please Select One 🗸)		
		Please Select One			X
		IFB RFP			Create

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. Navigate to the '**Team**' tab and add any other users that you want to have access to the SP. By default, only the user who clicked '**Create**' can see the SP at this point.

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.

Overview Documents Task	Team Message Boa	ard Event Messages History	
Team Members		From the ' Team' Tab, click	on the
Group 1	Members	specific 'Project Group' na	
Evaluation Committee	(none)	'Project Member' name for	
Internal Agency Administrator	(none)	details on who is in each 'G	roup.
P&C Admin	P&C Admin		
P&C Approver Team #1	P&C Service Team #	*1	To edit any ' Project
P&C Sourcing Team	State Purchase and	Contract Approver - For Contract approval only	Groups,' click on 'Actions' and select 'Edit' from the
Project Owner	SourcingTrainer10		drop-down menu.
Subject Matter Advisors	(none)		

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.

Team Define the Team for this Sourcing Project. To add a new Group to this Sourcing Team Members	Project, click Add Group.	OK
Group 1 Internal Agency Administrator P&C Admin P&C Admin P&C Approver Team #1	Members (none) P&C Admin P&C Service Team #1	Click the down arrow to change a 'Group Member' or 'Add More' to add other users to a 'Project Group.' Click 'OK' when done.
P&C Sourcing Team Project Owner Delete Add Group	State Purchase and Contract Approver Y Add more SourcingTrainer10 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. To complete the Solicitation Document, view the Sourcing Event to get the Event's **'Document Number.'**

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.

Overview (Documents) Tasks	Team Message Board Event Messages History	
Sourcing Project Test	Click on the 'Solicitation Document'	Show Details Actions 🔻
Name	template (obscured in this image) and	Status
Sourcing Project Documents	select ' Download' from the dropdown to	
▼ □ Solicitation Document ∨	Project Owner	
	Project Owner	Not Edited
Sou	Project Owner	
Doc Doc View Details	Project Owner	

2. Click on the Event template in the 'Sourcing Event' folder and select 'View Details' from the dropdown.

Overview Documents Tasks Team Met	ssage Board Event Messages History	
Sourcing Project Test		Show Details Actions 🔻 🎫
Name		Status
►		wner
▼ 🗇 Solicitation Document ∽		wner
IN RFP_Agency_Services ∨	dropdown to access the Sourcing Event.	wner Not Edited
▼ 🗇 Sourcing Event∨	Project O	lwner
Non-IT RFP Agency Services Sourcing Event Template	V Project O	Not Created
Doc Action	Project O	lwner
View Details		
Edit		

3. 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 and will also be 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 'Actions,' and select 'View Project' from the dropdown.

E Doc290494142 - Non-IT RFP Agency Services Sourcing Event Tem						Not Created
	Overview	Content	Suppliers	Messages Log	The 'Document Number' of the Sourcing Event will be used as part of the Bid or	Actions 🗸
Ove	erview				Proposal number.	

4. 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 'OK.'

🔻 🖬 Solic	itation Document	Project Owner
[₩ ► 🗅 Sou	Action	Select ' Replace Document' from the dropdown to upload the
► Doc	Download View Details	completed version of the Solicitation Document to the Sourcing Project.
Ś	Replace Document	

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 the Event. Users will load their completed Solicitation Document in **subsection 3.1** for vendors to download, fill out (including an '**Execution**' section to capture a signature that can be used in contract documentation), and return. Users may also need to generate a Pricing Document to load for the vendor in **subsection 5.1** per system defaults.

The information included in the Solicitation Document template is coordinated with the information in the content of the Event. The Solicitation Document has many of the specific details regarding the solicitation and is returned by the vendor in the Event, which also contains preloaded attachments (such as HUB status and References) for vendors to download and return. Users have the option to include additional attachments in the Event Content for vendors to fill out and return, or may need to adjust or remove any preloaded attachments that may not be relevant to their Solicitation.

1. From the 'Documents' tab, click on the Event template in the 'Sourcing Event' folder and select 'Edit' from the dropdown to access to the Event.

▼ 🗇 Sourcing Event∨	Project Owner	
fer Non-IT RFP Agency Services Sourcing Event Template ✓	To access the Sourcing Event, click on the Event template and select	Not Created
► Doc Action	'Edit' from the dropdown.	
View Details		
Edit		

After adding a 'Title' and 'Description' on the subsequent 'Edit Event' page and clicking 'OK,' 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.

Timing Rules	
Response start date: * When I Click the Publish button on the Summary page Schedule For the Future:	To access the Sourcing Event again, click on the Event and select ' Edit ' from the dropdown.
Due date: * O Duration: End time explicitly specified	⁽⁾
Fixed time: 3/31/2021 3/31/2021 3/31/2021 3/30	Reminder (Edit)

- 3. When the 'Due date' has been set, click onto Section 3 (Content) on the left side of the screen.
- 4. Scroll to subsection 3.1 and click on the blue text in that field. Select 'Edit' from the dropdown menu.

•	3 Solicitation Document and Details ✓		
	This section contains the details of the Solicitation, including details on the intent, use, duration, and process and instructions on how to respond, and the State's terms and conditions. Any issued Adde		on the Solicitation
~	3.1 SOLICITATION DOCUMENT This document includes details on the interv, use, duration, and scope of the goods and / or services be and the State Hermise and conditions. UV SAMINE CHANK DOCUMENT.doc ∨	ing requested, information on the solicitation process and instruction	ons on how to respond,
	3.2 STIONS Action any questions they may have regarding this Solicitation or the Solicitation Pro- will be Edit the date and time listed in Section 2.4 of this Solicitation Document.	and select 'Edit' from the dropdown.	cerning this Solicitation
	3.3 ATTACHMENT B: INSTRUCTIONS TO VENDORS 🕒 Form_North-Carolina-Instructions-to-Vendo	ors_09.2021.pdf V	1

5. Click the '**Update file**' link and select '**Upload a file from desktop**' to replace the sample document with the finalized Solicitation Document.

Attachment: * 🐨 SAMPLE BLANK DOCUMENT.d 🖒 V Up Upload a file from desktop * Reference Documents: Attach a file 🗸 (i) Select file from library	Click ' Update file ' (slightly hidden in this screenshot) and replace the template with the completed Solicitation document.
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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.

5 - Pricing Submittal / 5.1 - ATTACHMENT A: PRICING SUBMITTAL					
Name: *					
	ATTACHMENT A: PRICING SUBMITTAL				
	Vendor shall download, complete, and up ok Excel file that is available by clicking of instructions on the first work eet of the file.				
Is this a prerequisite question to continue with the event?	No field to make sure the text matches the				
Answer Type:	Attachment				
Response Required?	Yes, Participant Required V				
Reference Documents:	Attac Upload a file from desktop				
Visible to Participant:	Ye Select file from library				

 Review the remainder of the 'Content' sections and subsections. Content can be added, deleted, or edited as necessary by checking the box next to the relevant subsection and clicking the appropriate button below.

	6.5 ATTACHMENT G: CERTIFICATION OF FINANCIAL CONDITION							
	As a condition of contract award, the Vendor must demonstrate that it has the financial capacitor documentation required in the Solicitation Document. Vendor shall download complete, sign provide the required supporting documents, as applicable.	sections by clicking the box next to the subsection						
	Answer Attach a file ✓	and selecting the appropriate option below.						
	6.6 ALTERNATE RESPONSE							
	Vendor may submit an alternate response that proposes different options from those required by the Solicitation. Alternate responses must specifically identify the Solicitation requirements and advantage(s) addressed by the alternate response. Each alternate response must contain a completed and signed Solicitation Document and Attachment A: Pricing. Vendor may upload a compressed file (e.g. WinZip) with one or more alternate responses to this Solicitation by selecting "Attach a file." V							
	Answer Attach a file V	-						
(5)	Add • Edit • Delete Excel Import • Si	mplified Excel Import Smart import from Excel (*) indicates a required field						

8. 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, ignore this step and 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).

- 1. 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)**.
- 2. 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 may show a default end time for the bidding **'Due Date'** that is not accurate, 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.

Response Deadline: * 17 Mar 2021 11:59 PM EST Award Date: 11:59 PM EST Description: * B I U E E I 4 (14 pt) Y	Add a note to the existing ' Description ' text regarding the actual end time for the ' Response Deadline' for the Event.
Example Event NOTE: The actual end tin event is 2:00 PM EST on	ne for bidding on this 17 Mar 2021

3. 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.

* Indicates a required field	Click 'Publish on Ariba Discovery' in			Publish on	Ariba Discovery
		-	Prev	Next	Exit

4. 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 confirm 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. Any changes after clicking 'Publish' would need to be made in the form of an addendum.

Event	Doc173502734 - Sample Sourcing Event	Prev (Publish / Exit			
	When all portions of the Sourcing Event have been completed, click ' Publish ' in the upper right corner	u finish, you can launch the event or leave it as a draft for future edits.			
	of Section 4 (Summary) to make the Event live.	Commodity: (no value) Regions: (no value)			

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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.

Overview Conte	nt Suppliers	Discovery Suppliers	Messages	Log	Scenario		Actions 🔻
TEST DISCOVER	Y PROJECT	DO NOT RESPON	D NCeP - 4	Close	ed - No addition	al respo	onses allowed
State of North Carolina	9		\backslash				
Posted On: 21 Jul 2020 Open for bidding on: 21 Jul 202				16 Views	0 Seller Responses	0 Q&A	513 Sellers Notified
Response Deadline: 29 Jul 202	0 8:59 PM PDT			Fro	m the 'Disco '	verv	
Hide Details Add Attachment	Share: 🛃 匡 in 🖂			Sup	opliers' tab o	n the	eave feedback
Opportunity Amount:	Less than \$1000 L	JSD (Bid amount not required)		Sou	urcing Event,	сору	
Response Deadline:	29 Jul 2020 8:59 PM F	PDT		/ the	'Public Post	ing'	
Posting ID:	8637214(Doc6165169	96)		UR	L to paste in I	PS.	
Suppliers Invited:	0						
Posting Type:	Request for Informatio	n					
Privacy:	Participating supplier l	list hidden					
	Company name hidde	n. Company alias (Ariba Discover	y Buyer) will be displaye	ed.			
	-Centact name-hidden	🖌					
< Public Posting:	http://discovery.ariba.c	com/rfx/8637214					