

NC eProcurement

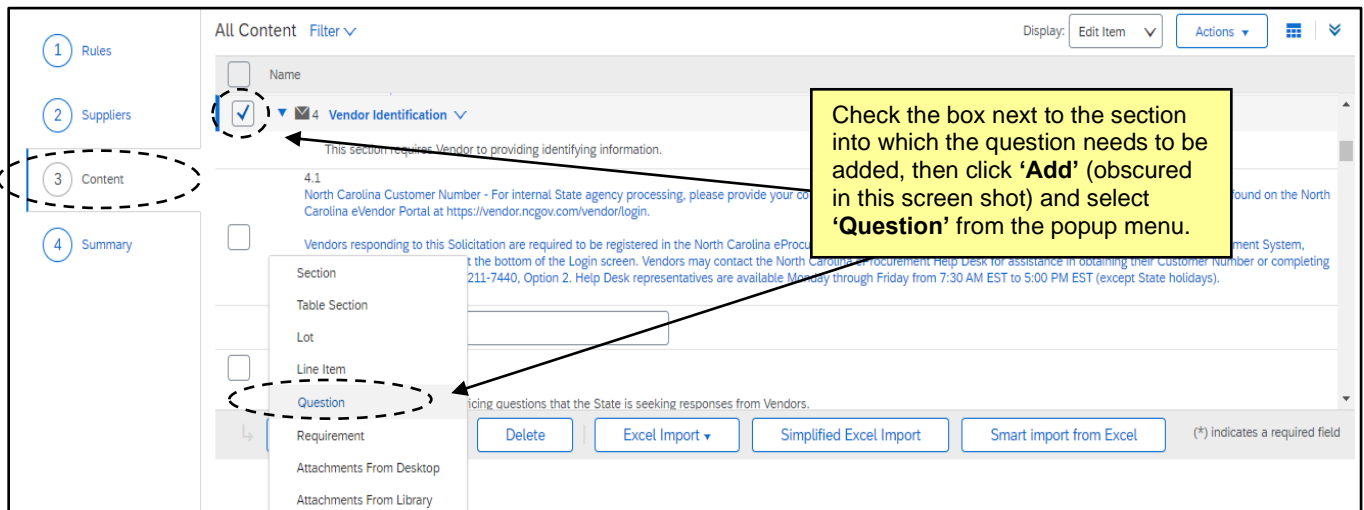
Adding Special Content to a Sourcing Event

The **'Content'** section of a Sourcing Event is tied to the user's choice of a **'Solicitation Vehicle.'** The default questions in the **'Content'** section complement the structure of the **'Solicitation Document'** template a user will find on their Sourcing Project. Sometimes, though, solicitations require different options than the default template provides, in which case the user can add special content to their Sourcing Event such as additional questions or line items.

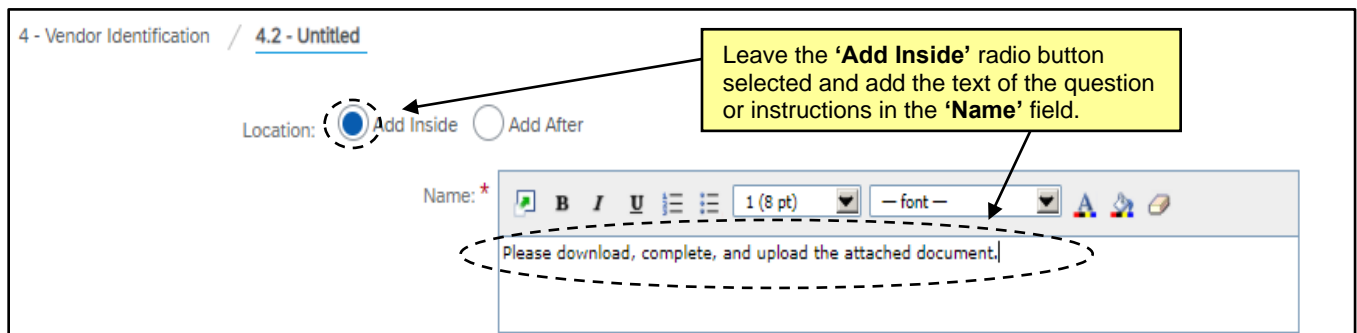
I. Adding a Question to a Sourcing Event

Adding a question to the Event content will allow vendors to provide additional information not initially included by default. Questions can have different **'Answer Types,'** prompting the vendor to answer in a specific way, such as a simple **'Text'** response, a **'Money'** value, a **'Yes / No,'** dropdown response, or by adding an **'Attachment'** to their response.

1. On the **'Content'** section of a Sourcing Event, check the box next to the numerical section header into which the question needs to be added and click **'Add,'** then select **'Question'** from the popup menu.



2. The **'Add Question'** page will display. **'Add Inside'** is the first default field populated. It is suggested that users keep this value so that the new question is added directly following the last current subsection.
3. In the **'Name'** field, users should add the text of the question they want the vendor to answer. In the situation where a user wants the vendor to provide a document as their answer, this text may be a set of instructions as opposed to a question.



4. Leave the **'Is this a prerequisite...'** field value set to the default of **'No.'** Further down there is another field for **'Response Required?'** that defaults to **'Yes, Participant Required'** where the user can indicate whether this question must be answered by the vendor before they submit their full response. If the user doesn't want to make the question mandatory, they can select **'Not Required'** from that dropdown.
5. The **'Answer Type'** field will default to **'Text (single line limited)'** which allows vendors to respond with up to 255 characters. **'Text (single line)'** will allow up to 4000 characters, and **'Text (multiple lines)'** will have no character limit in the vendor's response.

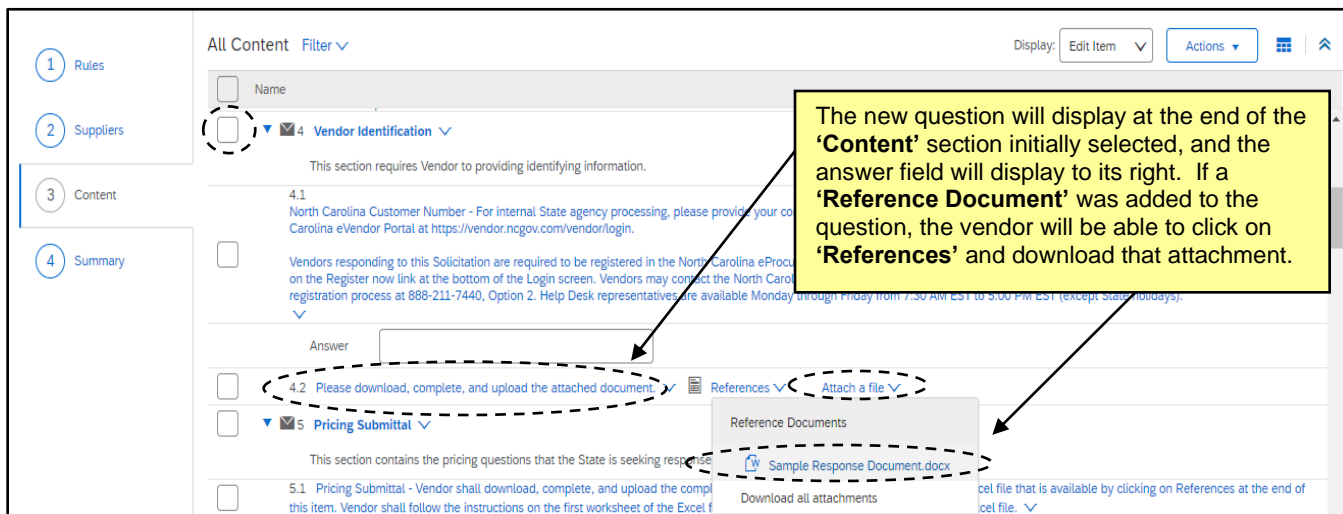
An **'Answer Type'** of **'Money'** will allow the vendor to enter in a dollar value for their answer, and selecting **'Attachment'** will allow the vendor to respond by attaching a document, either their own or one that the user provides for them. Additional options exist as well.

6. Once an **'Answer Type'** has been selected, users can change the default settings on other fields if necessary. It is suggested that users keep the default values for all additional fields, but users may want to switch the value in the **'Participant can add additional comments and attachments'** field from **'No'** to **'Yes'** if they want vendors to be able to supplement their main answer with additional information.
7. If an **'Answer Type'** of **'Attachment'** has been selected and the user wants to provide the vendor with a document for them to download, fill out, and upload as their answer, the user should click the **'Attach a file'** link in the **'Reference Documents'** field and select **'Upload a file from desktop,'** then choose the file to attach and click **'OK.'**

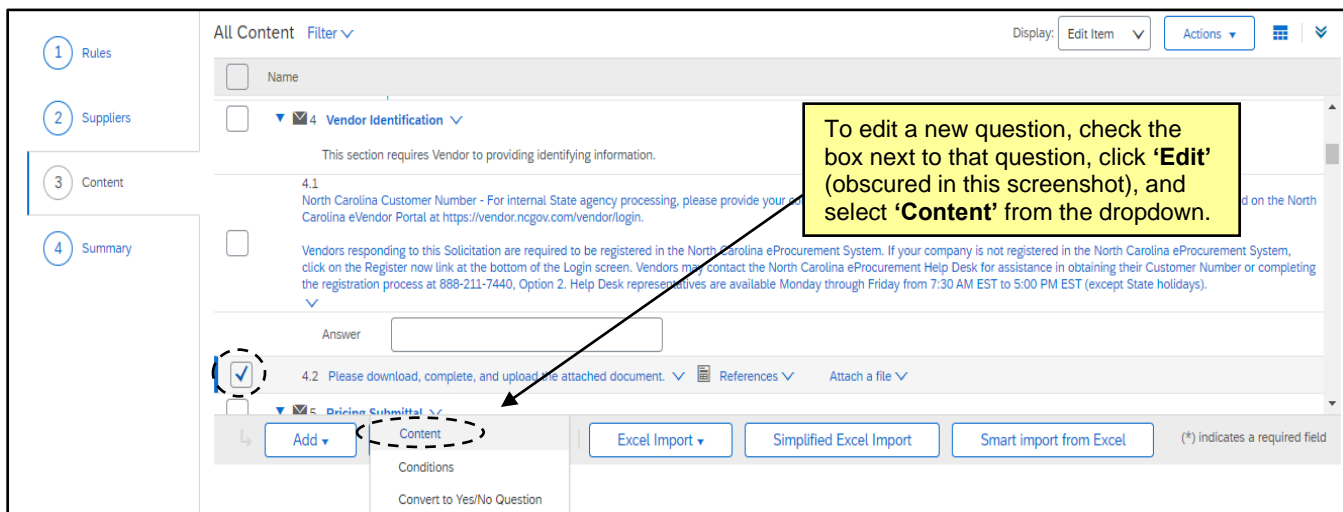
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- Once all adjustments have been made, the user should click **Done** in the top right and they will be returned to the **Content** section to see the new question added to the end of the section they indicated.



- If the user needs to make any additional edits to that question, they can check the box next to that question, click **Edit**, and select **Content** from the dropdown menu.

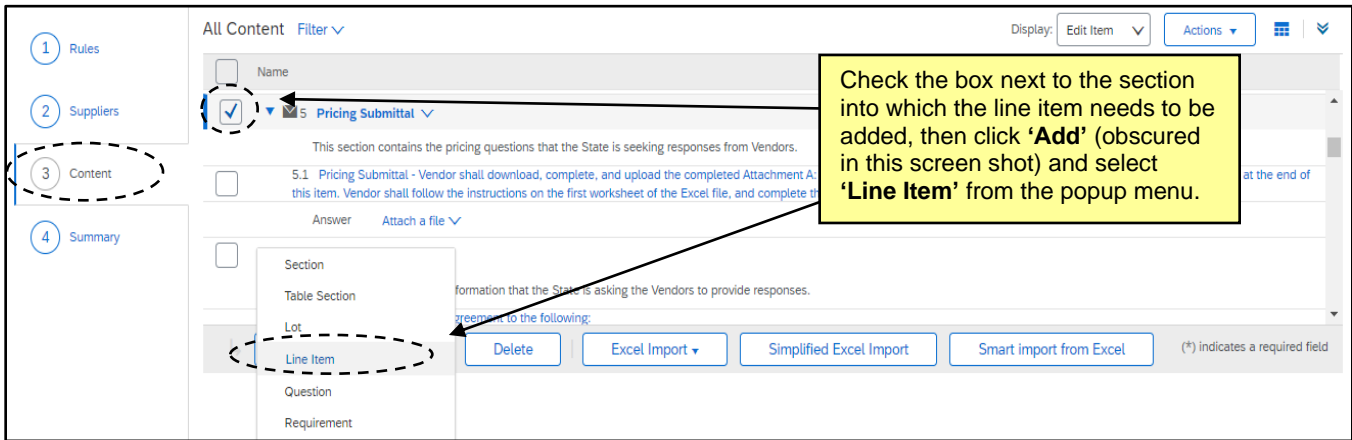


II. Adding a Single Line Item to a Sourcing Event

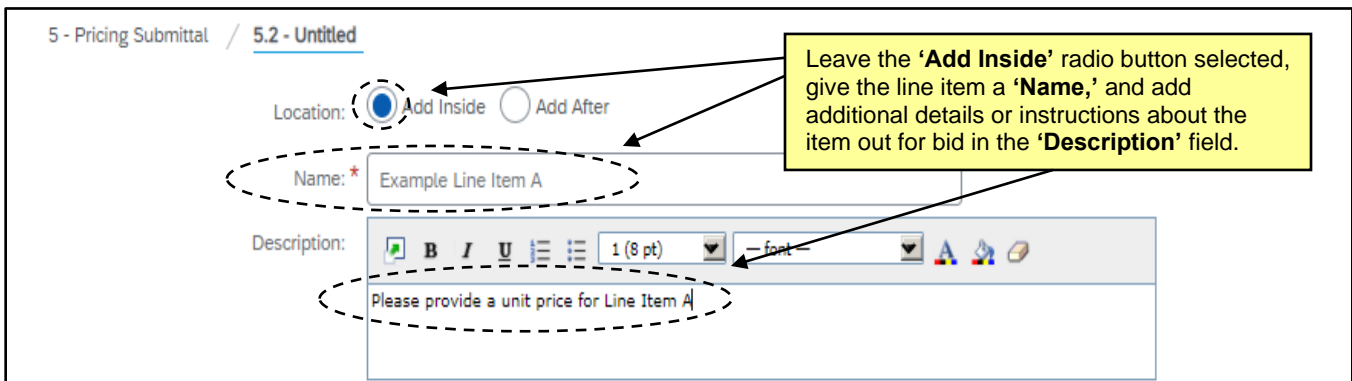
Adding a line item to an Event provides the vendor with a place to enter pricing information directly into the Event **‘Content’** as opposed to submitting it via an attachment.

1. On the **‘Content’** section of a Sourcing Event, check the box next to the numerical section header into which the line item needs to be added and click **‘Add,’** then select **‘Line Item’** from the popup menu.

Note: The default section for **‘Pricing Submittal’** is **Section 5**.



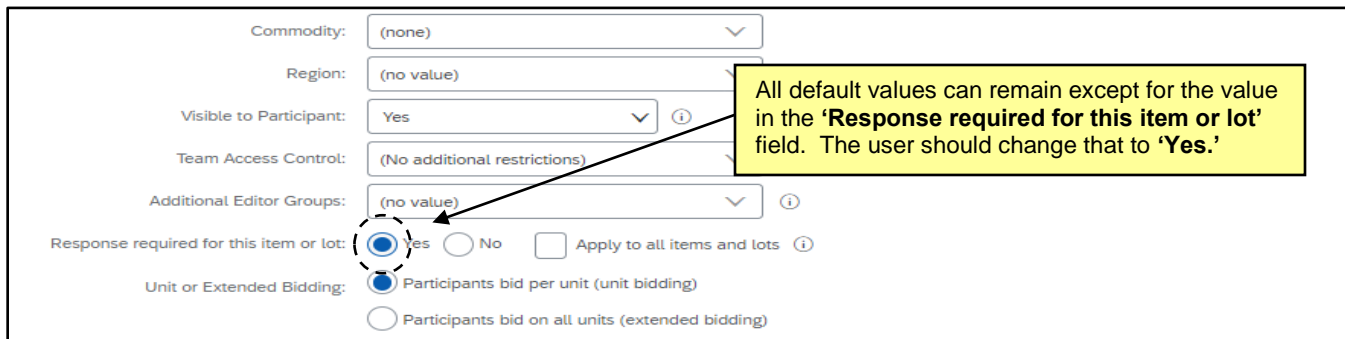
2. The **‘Add Item’** page will display. Select **‘Add Inside’** to add the new line item in line with the last current subsection.
3. In the **‘Name’** field, add a title for the item for which the vendor will be providing pricing.
4. The **‘Description’** field may be used to provide more details about the item for which the vendor will be providing pricing. For example, a Supplier Part Number for a specific item, or a more general description of the item desired. The user could also choose to include instruction for the vendor in this space, such as “Please provide a unit price for Item A.”



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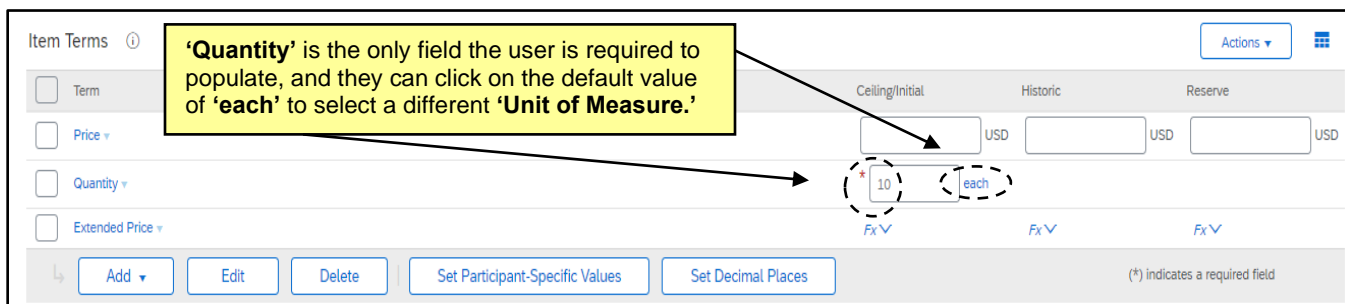
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- The **'Commodity'** field will not be attached to the **'Commodity'** entered anywhere previously on the Project or Event and is an optional field. The vendor will not see this field even if it is populated.
- It is suggested that all other fields are left in their default positions except **'Response required for this item or lot.'** This field defaults to **'No,'** but the user should switch it to **'Yes.'** This will eliminate an extra step for the vendor when they respond.



Commodity: (none) [v]
 Region: (no value) [v]
 Visible to Participant: Yes [v] ⓘ
 Team Access Control: (No additional restrictions) [v]
 Additional Editor Groups: (no value) [v] ⓘ
 Response required for this item or lot: Yes No Apply to all items and lots ⓘ
 Unit or Extended Bidding: Participants bid per unit (unit bidding) Participants bid on all units (extended bidding)

- Scroll down to the **'Item Terms'** section. This section will give the user an opportunity to customize the terms of the pricing response for the line item. The first term that can be edited is **'Price.'** This term contains three optional fields that the vendor will never see, but could potentially be helpful for the user as reference points when they are reviewing bids. It is recommended to leave these fields blank.
 - If **'Ceiling/Initial'** is populated, it will represent an upper limit, or ceiling, for a vendor's pricing response. For example, if this field is set to \$500, and the vendor tries to submit a price of \$501 or higher, they will receive a message telling them they have exceeded the upper bidding limit.
 - The **'Historic'** field can be used to indicate what the user has historically paid for that item.
 - The **'Reserve'** price is the price at which it makes sense for the user to award the item.
- 'Quantity'** is the only field the user is required to populate. In it the user will indicate how many units of the item they need. For example, if the user wants a quote on 10 widgets, they will enter **'10'** in that field, and when the vendor provides their response, they will enter their unit price.
- The **'Unit of Measure'** defaults to **'each,'** but users can change this by clicking on **'each'** and selecting a different **'Unit of Measure'** from the subsequent popup menu.
- 'Extended Price'** lists the default formula of **'Price*Quantity'** that calculates for each line item and is not editable.



Item Terms ⓘ

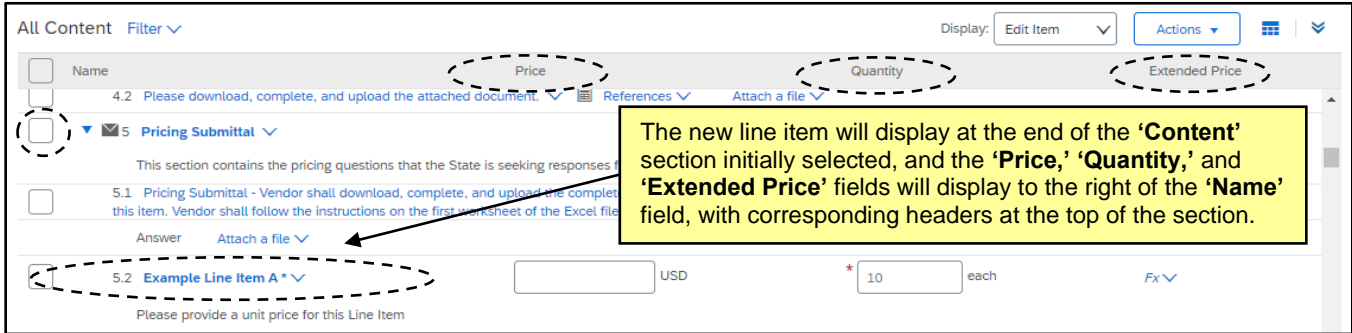
Term	Ceiling/Initial	Historic	Reserve
Price ▾	USD	USD	USD
Quantity ▾	10		
Extended Price ▾	Fx ▾	Fx ▾	Fx ▾

Actions ▾ [☰]
 Add ▾ Edit Delete Set Participant-Specific Values Set Decimal Places (*) indicates a required field

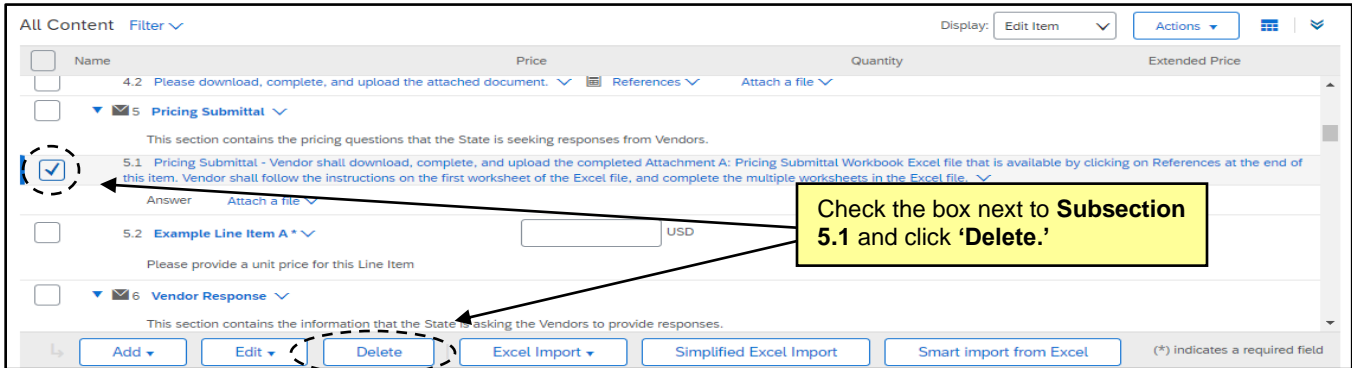
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11. Once all terms are set, the user should click **Done** in the top right and they will be returned to the **Content** section to see the new line item added to the end of the section they indicated.



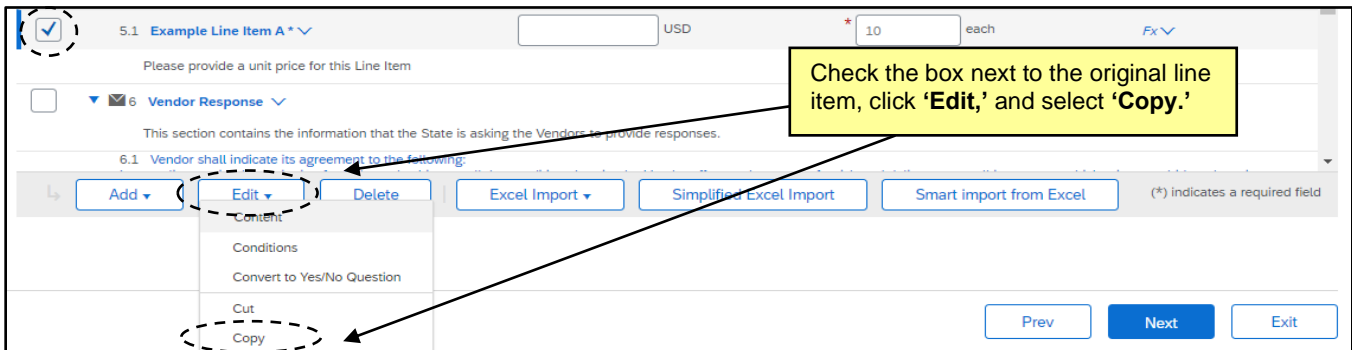
12. If adding a **Line Item** eliminates the need for vendors to return pricing via an attachment per the default template, the user should delete **Subsection 5.1** by checking the box to its left and clicking **Delete.** The **Line Item** that was just added will subsequently be relabeled **Subsection 5.1** in its absence.



III. Adding Several Line Items to a Sourcing Event via Excel Import

If the user wishes to add several line items to an Event, there are alternative methods to make the process easier. Line items can be copied for simple duplication, or they can be loaded in bulk through a process called a **'Simplified Excel Import.'**

1. To copy a line item, check the box next to the original line item, click **Edit,** and select **Copy** from the dropdown menu.



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2. Check the box next to the original line item again, click **'Edit,'** and this time the user should see and select **'Paste'** from the dropdown menu. This will create a duplicate of the line item right below the original one, and the user can make changes to the new line item by checking box next to it, clicking **'Edit,'** and selecting **'Content'** from the dropdown menu where they can update the **'Name,'** **'Description,'** and **'Quantity'** values for the new line item.

After pasting the copied line item into the **'Content'** section, the user can edit the duplicate line item by checking the box next to it, clicking **'Edit,'** and selecting **'Content'** from the dropdown.

3. To add large quantities of line items, the **'Simplified Excel Import'** process may make the most sense. It is advised that before a user begins this process, they manually add at least one line item in the manner described in the previous section. This will serve as a guide for adding the others in bulk. Once the first line item is present, the user should click the **'Simplified Excel Import'** button.

Add at least one line item manually, then click the **'Simplified Excel Import'** button.

4. The **'Import Content from Excel'** page will display. In **'Step 1'** follow the instructions to **'Click here to open RFP in an Excel Spreadsheet.'**

Click the **'Click here...'** link in **'Step 1.'**

- An Excel file with the Event title as the name will download for the user. Open the file and 'Enable Editing' if necessary, then click on the second tab named 'Line items.' The contents of Section 5 of the Event 'Content' should display on the spreadsheet including the manually-added line item.

System Id	Type	Number	Item Name	Description	Commodity	Price	Historic Price	Reserve Price	Quantity	UOM.Quantity
214660889	Section	5	Pricing Submittal	This section contains the pricing questions that the State is seeking responses from Vendors. Please provide a unit price for this Line Item					10	EA

- Using the manually-added column as a guide (row 14 in the example below), the user can add as many line items as desired. Columns 'B,' 'C,' and 'D' are the only required fields to populate, but it is advised that the user also complete Columns 'J' and 'K.' Each of these columns are displayed in red text on the header row.
 - Column B (Type):** This field must have the words 'Line Item' in it.
 - Column C (Number):** This field should be the subsection that the line item will appear in. If the previous row value is '5.1,' that row should be populated with '5.2,' and the next with '5.3,' etc.
 - Column D (Item Name):** Enter the name of the item for which the vendor will provide pricing.
 - Column E (Description):** This field is optional, but the user can add more details if desired.
 - Column J (Quantity):** The user should enter the number of items for which they want pricing.
 - Column K (UOM.Quantity):** This field requires the user to enter the shortened 'Symbol' for the 'Unit of Measure,' not the name. In the example above, that symbol is 'EA' for 'each.' 'Symbols' for other 'Units of Measure' can be found in the popup that displays when 'each' is clicked within the 'Edit Item' page. Please see the Appendix at the end of this document for a list of several common 'Units of Measure' and their corresponding 'Symbols.'

System Id	Type	Number	Item Name	Description	Commodity	Price	Historic Price	Reserve Price	Quantity	UOM.Quantity
	Line Item	5.1	Example Line Item A	Please provide a unit price for this Line Item					10	EA
	Line Item	5.2	Example Line Item B						5	EA
	Line Item	5.3	Example Line Item C						10	EA
	Line Item	5.4	Example Line Item D						5	EA
	Line Item	5.5	Example Line Item E						10	EA
	Line Item	5.6	Example Line Item F						5	EA
	Line Item	5.7	Example Line Item G						10	EA
	Line Item	5.8	Example Line Item H						5	EA
	Line Item	5.9	Example Line Item I						10	EA
	Line Item	5.10	Example Line Item J						5	EA

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- When all desired line items have been added to the Excel sheet, the user should save the document to their computer. Return to the **'Import Content from Excel'** page and upload the file in **'Step 3.'** When the file is loaded, click the **'Import'** button in **'Step 4.'**

Import Content from Excel Done

You can use Microsoft Excel to enter content into your event. If you have an existing Excel spreadsheet that contains this information, create a template, copy [More](#)

Step 1. [Click here to open RFP in an Excel Spreadsheet.](#)
Skip this step if you wish to Import a previously downloaded file.

Step 2. Edit the Excel Spreadsheet and save the file to your computer.

Step 3. Locate the saved Excel file on your computer using the Browse button.
 No file chosen
 Or drop file here

Step 4. Click **Import** to import the contents of the Excel file to RFP.
Note: All Existing Contents of the Event will be replaced.

Upload the completed file in **'Step 3,'** then click the **'Import'** button in **'Step 4.'**

- If there are any errors on the spreadsheet, the import will be halted and an error message will display alerting the user to what needs to be changed. If the import was successful, the user will be returned to the **'Content'** tab and a message reading **'The Excel file has been successfully imported'** will be displayed at the top of the screen. As the user scrolls down, they will see newly added line items reflecting the information entered onto the spreadsheet. No other aspects of the **'Content'** will be altered.

The Excel file has been successfully imported.

A success message will display above the newly added line items per the information entered into Excel.

All Content Filter ▾

	Name	Price	Quantity	Extended Price
<input type="checkbox"/>	5.1 Example Line Item A ▾	USD	10 each	Fx ▾
Please provide a unit price for this Line Item				
<input type="checkbox"/>	5.2 Example Line Item B ▾	USD	5 each	Fx ▾
<input type="checkbox"/>	5.3 Example Line Item C ▾	USD	10 each	Fx ▾
<input type="checkbox"/>	5.4 Example Line Item D ▾	USD	5 each	Fx ▾
<input type="checkbox"/>	5.5 Example Line Item E ▾	USD	10 each	Fx ▾

(*) indicates a required field

- Imported **'Line Items'** won't have the **'Response required for this item of lot'** field switched to **'Yes,'** as was encouraged in the previous section. Users should change that by editing one of the new line items and switching the selection to **'Yes'** while also checking the **'Apply to all items and lots'** box next to that field. This should apply that change to all **'Line Items'** in the Event.

Response required for this item or lot: Yes No Apply to all items and lots ⓘ

Unit or Extended Bidding: Participants bid per unit (unit bidding) Participants bid on all units (extended bidding)

Mark the **'Response required...'** field as **'Yes'** and check the box next to **'Apply to all items and lots'** to apply on all imported line items.

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IV. Appendix

Below is a list of common **'Units of Measure'** and their corresponding **'Symbol'** to be used during the **'Simplified Excel Import'** process for adding multiple line items as outlined in **Section III** of this document, particularly **Step 6, part f**.

UNIT OF MEASURE	SYMBOL
Each	EA
Actual Ton	26
Box	BX
Carton	CT
Case	CS
Dollar	DOL
Dozen	DZN
Foot	FOT
Gallon (US)	GLL
Hour	HUR
Lot	LO
Pack	PK
Pound	LBR
Roll	RO
Set	SET
Thousand	MIL
Other	OTH