# 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, publishing its Sourcing Event, and determining the awarded vendor. More detailed information on Sourcing Projects, Sourcing Events, and awarding can be found in the 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.
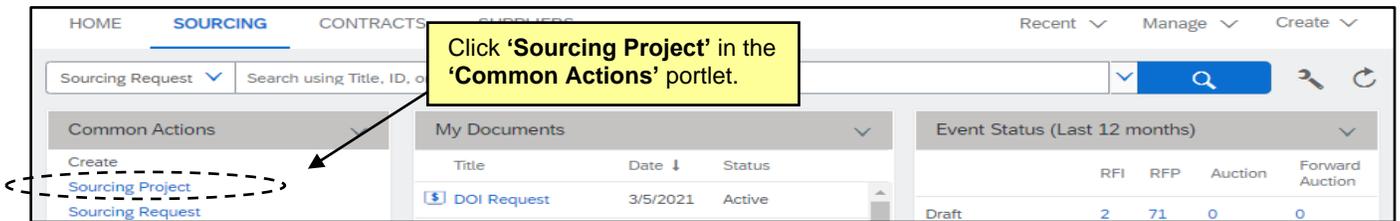

2. The **'Create Sourcing Project'** page will display. Populate all relevant fields, including the ten required fields, as noted by an asterisk (*).

    Note: Selecting **'Lite Sourcing'** from the **'Execution Strategy'** dropdown is most common.
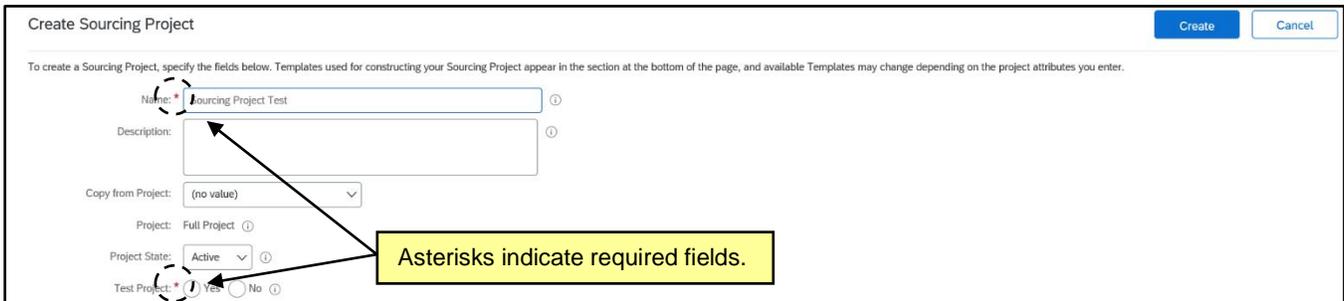
3. In the **'Select a template'** section of the **'Create Sourcing Project'** page, note the radio button next to the **'State of North Carolina Sourcing Process'** template is automatically selected. Users will be prompted to answer two questions indicating whether the solicitation will be an **'RFP'** or **'IFB,'** and whether it will follow a "Two-Step" process or not. One envelope is standard, so users should select the default option of **'No'** in the second question to follow the common path.
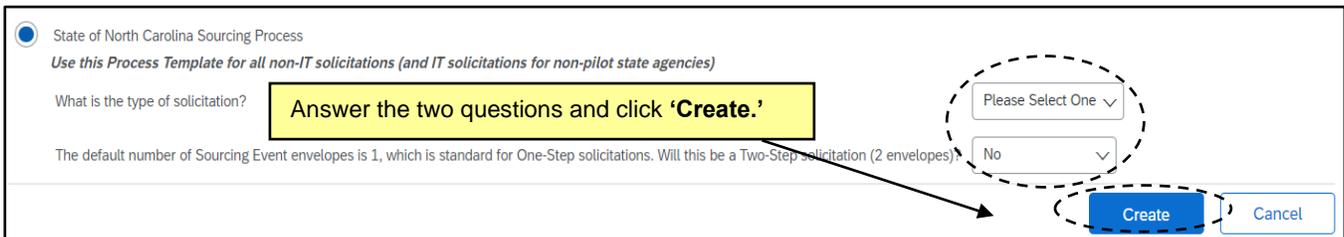
4. Click the **'Create'** button on the top or bottom right of the screen.

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.

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.

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'** among others. 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.'**

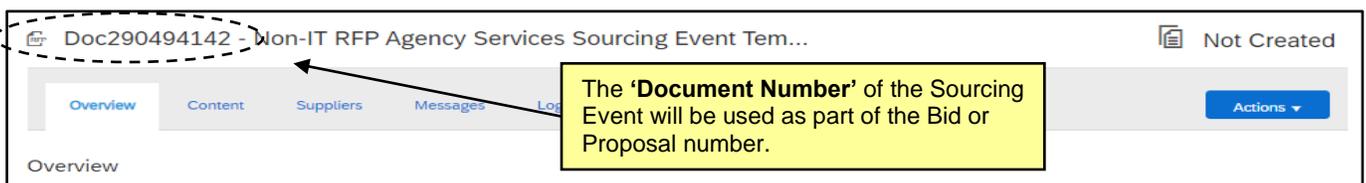1. To download the Solicitation Document template provided by the state, select **'Download'** from the dropdown that appears after clicking on the Solicitation Document template. Open the template and begin editing.

Overview	Documents	Tasks	Team	Message Board	Event Messages	History		
Sourcing Project Test						Show Details	Actions ▾	▦
Name								Status
▶ 🗀 Sourcing Project Documents ⌄								
▼ 🗀 Solicitation Document ⌄						Project Owner		
🗎w	Action					Project Owner		Not Edited
▶ 🗀 Sou	Download					Project Owner		
▶ 🗀 Doc	View Details					Project Owner		

> Click on the **'Solicitation Document'** template (obscured in this image) and select **'Download'** from the dropdown to

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

Overview	Documents	Tasks	Team	Message Board	Event Messages	History		
Sourcing Project Test						Show Details	Actions ▾	▦
Name								Status
▶ 🗀 Sourcing Project Documents ⌄								wner
▼ 🗀 Solicitation Document ⌄								wner
🗎w RFP_Agency_Services ⌄								wner Not Edited
▼ 🗀 Sourcing Event ⌄						Project Owner		
🗐 Non-IT RFP Agency Services Sourcing Event Template ⌄						Project Owner		Not Created
▶ 🗀 Doc	Action					Project Owner		
	View Details							
	Edit							

> Click on the **'Sourcing Event'** template and select **'View Details'** from the dropdown to access the Sourcing Event.

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.

🗐 Doc290494142 - Non-IT RFP Agency Services Sourcing Event Tem...				🗐 Not Created
Overview	Content	Suppliers	Messages	Log Actions ▾
Overview				

> The **'Document Number'** of the Sourcing Event will be used as part of the Bid or 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.'**

▼ 🗀 Solicitation Document ⌄			Project Owner
🗎w	Action		
▶ 🗀 Sou	Download		
▶ 🗀 Doc	View Details		
	Replace Document		

> Select **'Replace Document'** from the dropdown to upload the completed version of the Solicitation Document to the Sourcing Project.

5. Users should also replace the **'Preliminary Review Procurement Checklist Template'** with a completed version in the **'Solicitation Document'** folder, and add any other supporting documents that should be included in the review.


Include a completed version of the **'Preliminary Review Procurement Checklist Template'** document in the **'Solicitation Document'** folder along with the **'Solicitation Document'** draft and any other relevant supporting documents.
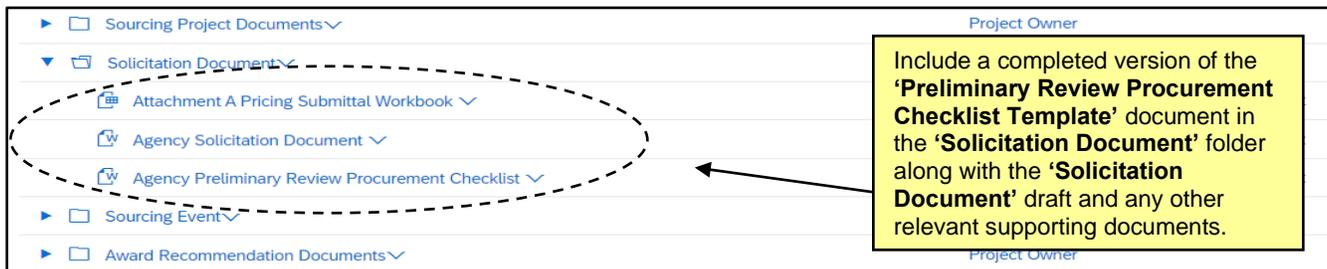
IV. Initiate Sourcing Event and Manage Event Content

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.**

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 and can 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.

To access the Sourcing Event, click on the Event template and select **'Edit'** from the dropdown.
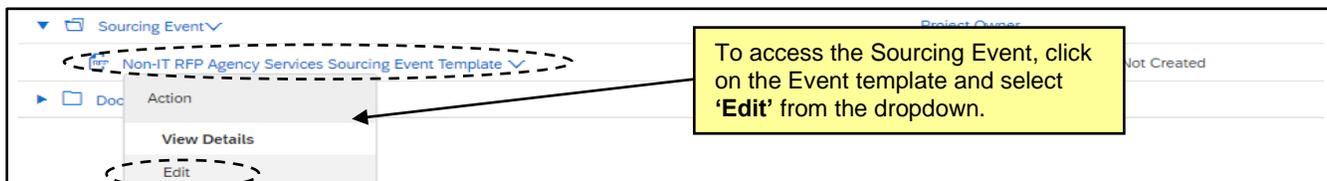
2. After adding a **'Title'** and **'Description'** on the subsequent **'Edit Event'** page and clicking **'OK,'** Section **1 (Rules)** of the Event will display. Under **'Timing Rules,'** set the **'Due date'** field to **'Fixed time'** and select the date and time for vendor bids to be due established in the Solicitation Document.

   Note: The **'Due Date'** may need to be adjusted before the Event is published if changes are made during the approval process.


Set the **'Due Date'** to a **'Fixed time.'**
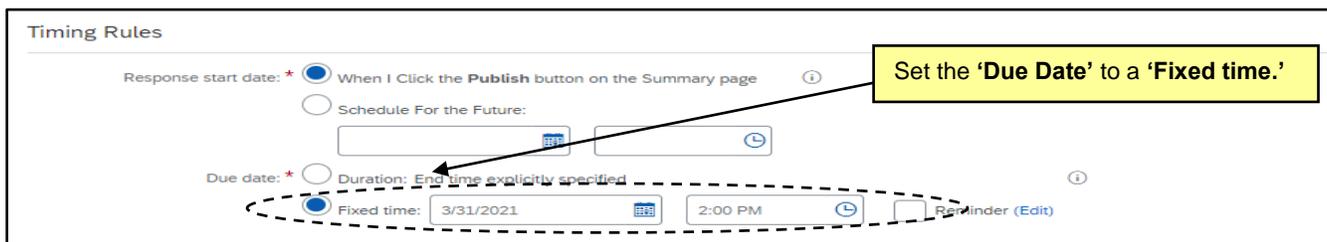
3. When the **'Due date'** has been set, click onto **Section 3 (Content)** on the left side of the screen.

4. Scroll to **Section 6** to review the Vendor Response subsections and attachments. Content can be added, deleted, or edited as necessary by checking the box next to the relevant subsection and clicking the appropriate button below. This **'Content'** should be complementary to that in the solicitation document, i.e., if an attachment is included in the document, it should be removed from the **'Content'** page.

Notes
- If the solicitation is being sent to P&C for approval, users will need to revisit and update this portion of the **'Sourcing Event'** after approval is granted but before publishing.
- If the solicitation is being sent to P&C for approval, click the **'Exit'** button in the top right and select **'return to project,'** then navigate to the '**Tasks'** tab. If no approvals are necessary, skip the next section of this document.
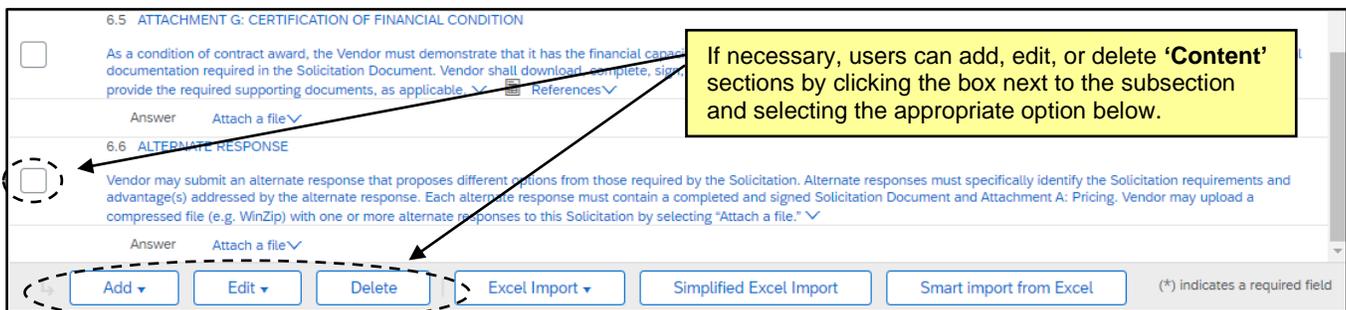
V. Send Solicitation to P&C for Approval

If the solicitation needs to be approved by P&C before publishing, users will do that via the built-in **'Gain P&C Approval of Sourcing Event'** task in **'Phase 04'** of the **'Tasks'** tab.

1. On the **'Tasks'** tab, click on the **'Gain P&C Approval of Sourcing Event'** task and select **'View Task Details'** from the drop down.

2. On the subsequent **'Approval Task'** page, add the appropriate P&C Service Team as an approver (through clicking on the **'Custom'** link), add a **'Due Date,'** and click **'Submit'** to send the request to P&C.
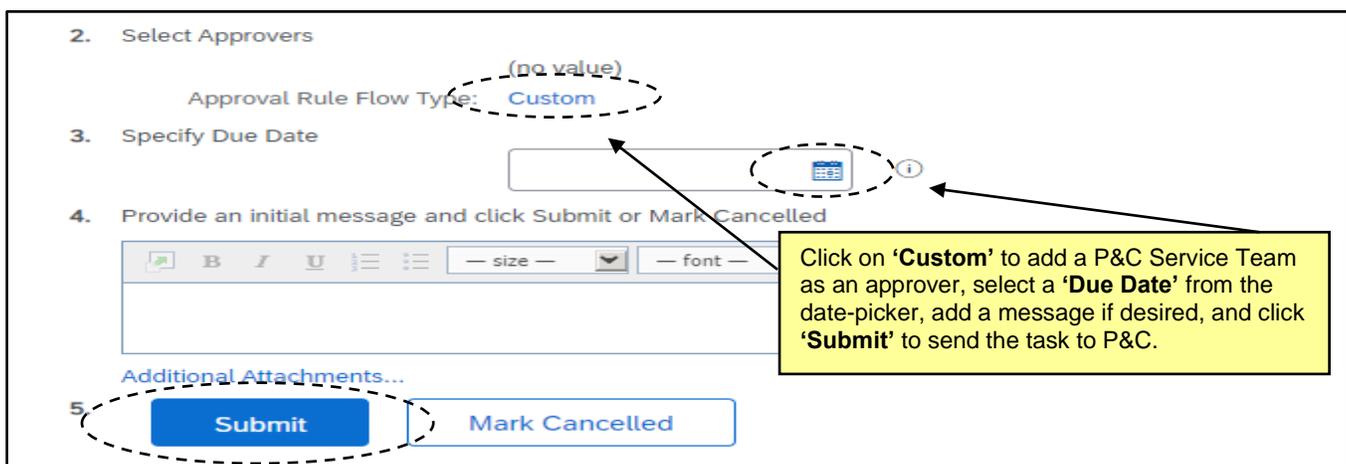
3. After P&C reviews and approves the solicitation, the task will automatically update to **'Approved'** status and a checkmark will appear to the left. The user can proceed to finalizing their **'Solicitation Document,'** then updating and publishing the **'Sourcing Event.'**

▼ ✓	04 - DEVELOP SOURCING EVENT ∨		Project Owner	Complete	02/28/2022
🕒	Populate Solicitation Document Template ∨	Solicitation Document ∨	Project Owner	Not Started	
🕒	Build Sourcing Event Rules and Content ∨	Sourcing Event ∨	Project Owner	Not Started	
✓	Gain P&C Approval of Sourcing Event ∨	Sourcing Event ∨	StateSourcingUser	Approved	02/28/2022
🕒	Create Supplier Research Posting and Publish Sourcing Event ∨	Sourcing Event ∨	Project Owner	Not Started	

VI. Finalize and Publish the Sourcing Event

After receiving approval from P&C, users should finalize and PDF their **'Solicitation Document'** then return to **Section 1 (Rules)** of the **'Sourcing Event'** to update any dates that may have changed during the approval process, and **Section 3 (Content)** to attach the final version of the **'Solicitation Document'** to **subsection 3.1** and make any other necessary updates.

Users will complete **Section 2 (Suppliers)** where they will **'Create a Supplier Research Posting'** and publish in Ariba Discovery. Then the Sourcing Event will be published in **Section 4 (Summary)**.

1. Access the Sourcing Event and verify the **'Due date'** under **'Timing Rules'** in **Section 1 (Rules).**

2. To add the finalized Solicitation Document, click onto **Section 3 (Content)** on the left side of the screen. Scroll to **subsection 3.1** and click on the blue text in that field. Select **'Edit'** from the dropdown menu.

Click the blue text in **subsection 3.1** and select **'Edit'** from the dropdown.

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


Click **'Update file'** (slightly hidden in this screenshot) and replace the template with the completed Solicitation document.

4. 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.
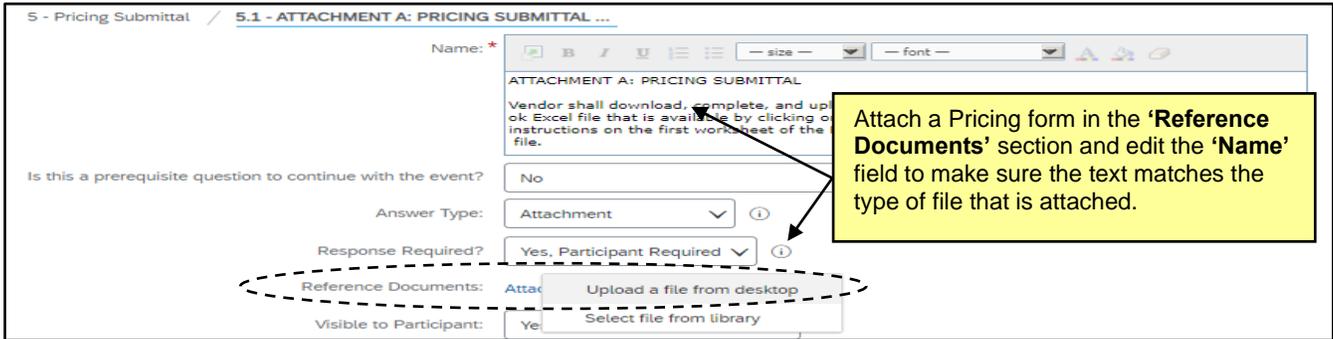
5. Review the attachments in the Vendor Response section and adjust if necessary, particularly if changes were made to the Solicitation Document during the approval process.

6. Click onto **Section 2 (Suppliers)** and 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: To clarify the **'Response Deadline'** for the vendor, add a note in the **'Description'** stating the end time for the Sourcing Event and accentuate the note by enlarging, bolding, and highlighting the text.
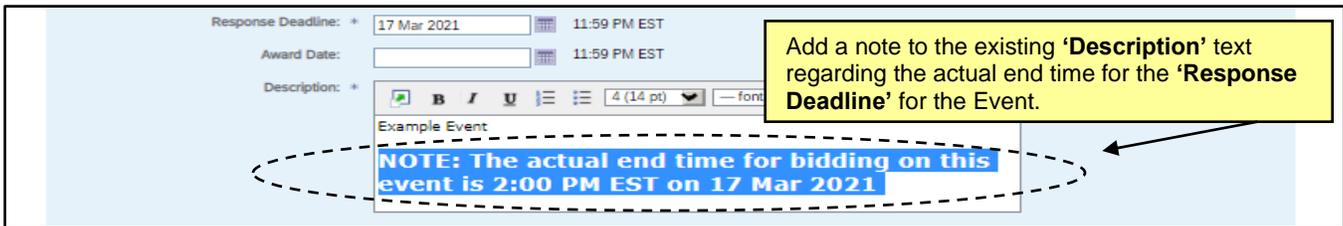
7. When all fields have been completed, click the **'Publish on Ariba Discovery'** button in the bottom right of the page to finalize. If users navigate away from **Section 2 (Suppliers)** before clicking this button, any updates will be lost.

8. 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 will be grayed out, and a message should alert the user to what is 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.
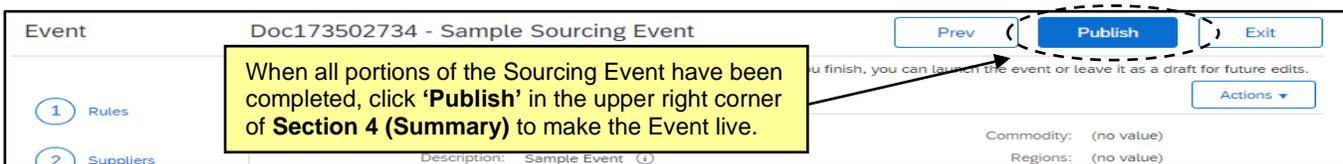
VII. Post Sourcing Event Summary and Link to Sourcing Event on IPS

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 within 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, pasting this URL into the **'NCEP URL'** field.

From the **'Discovery Suppliers'** tab on the Sourcing Event, copy the **'Public Posting'** URL to paste in IPS.

VIII. Send Award Recommendation to P&C for Approval

If the solicitation was approved by P&C before publishing, the **'Award Recommendation Memo'** will also need to be approved 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. On the **'Documents'** tab, open the **'Award Recommendation Documents'** folder and click on the **'Award Recommendation Memo'** document. Select **'Download'** from the dropdown, fill out the form and save a local copy, then click back onto the template and select **'Replace Document'** to upload the completed version of the **'Award Recommendation Memo.'** This must also be done for the **'Bid Award Recommendation Packet Checklist,'** which can also be found in this folder, and users should upload any other relevant documents.

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

3. On the subsequent **'Approval Task'** page, add the appropriate P&C Service Team as an approver, add a **'Due Date,'** and click **'Submit'** to send the request to P&C.

4. After P&C reviews and approves the documents in the **'Award Recommendation Documents'** folder, 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.