NC eProcurement

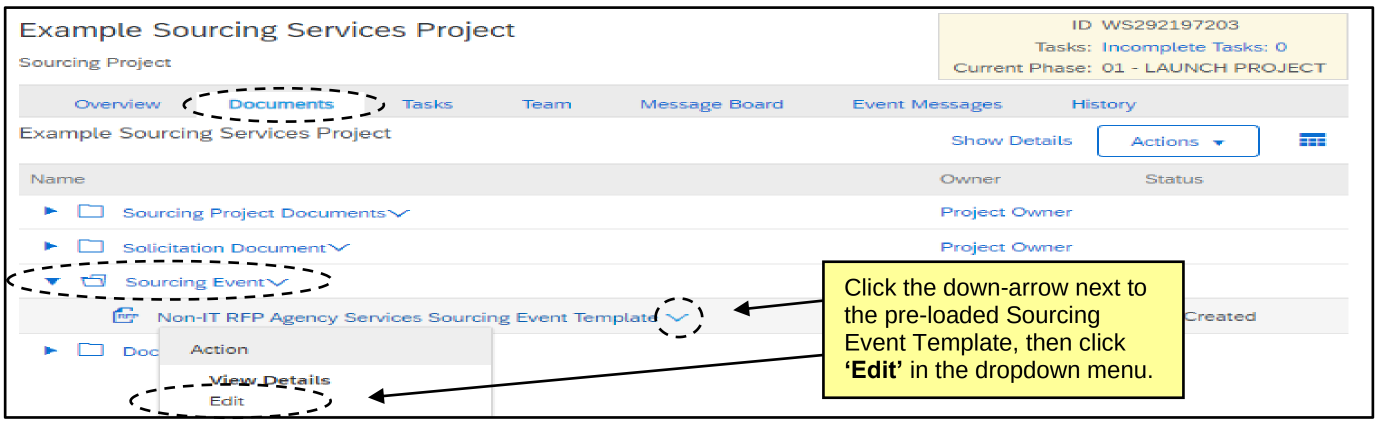
Managing a Sourcing Event

A Sourcing Event is the vendor-facing part of a Sourcing Project. The Sourcing Agent can establish the bidding dates and time, as well as compile all information the vendors will need to respond, as guided by a template established by the state. Notification of this Event can then be posted in IPS and interested vendors can follow a URL to respond electronically.

I. Create a Sourcing Event

1. Navigate to the **'Documents'** tab of the Sourcing Project and click the down-arrow to the right of the document within the **'Sourcing Event'** folder and click **'Edit'** from the drop-down menu.

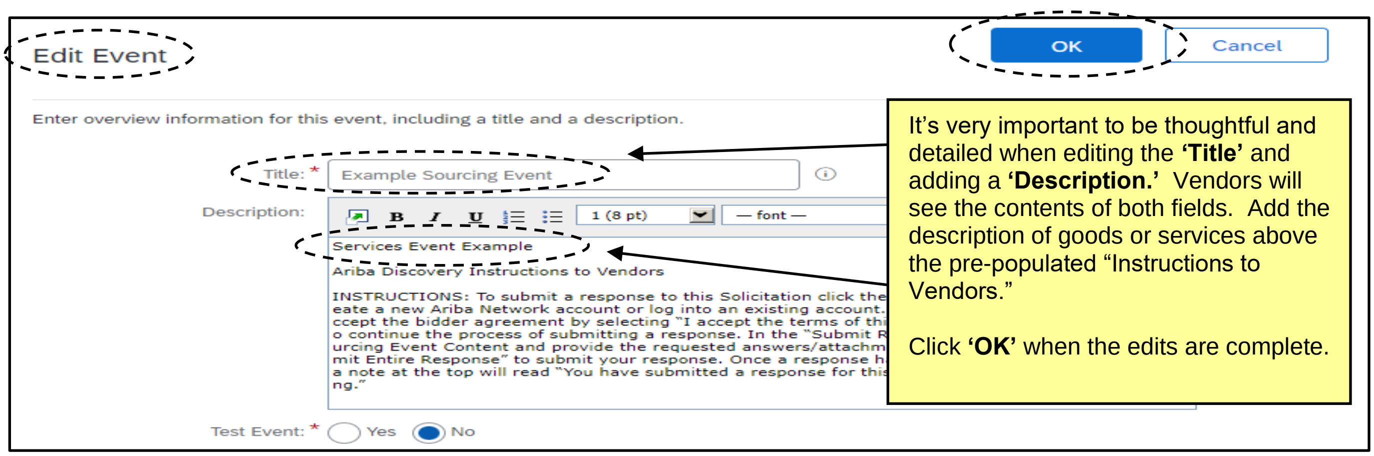
   Note: This document template will depend upon selections made in the **'Solicitation Vehicle'** field along with the answer to the **'Select a template'** question on the **'Create Sourcing Project'** page.



2. The **'Edit Event'** page will display. It is important to populate the **'Title'** and **'Description'** with pertinent information, keeping in mind that both will be visible to vendors.

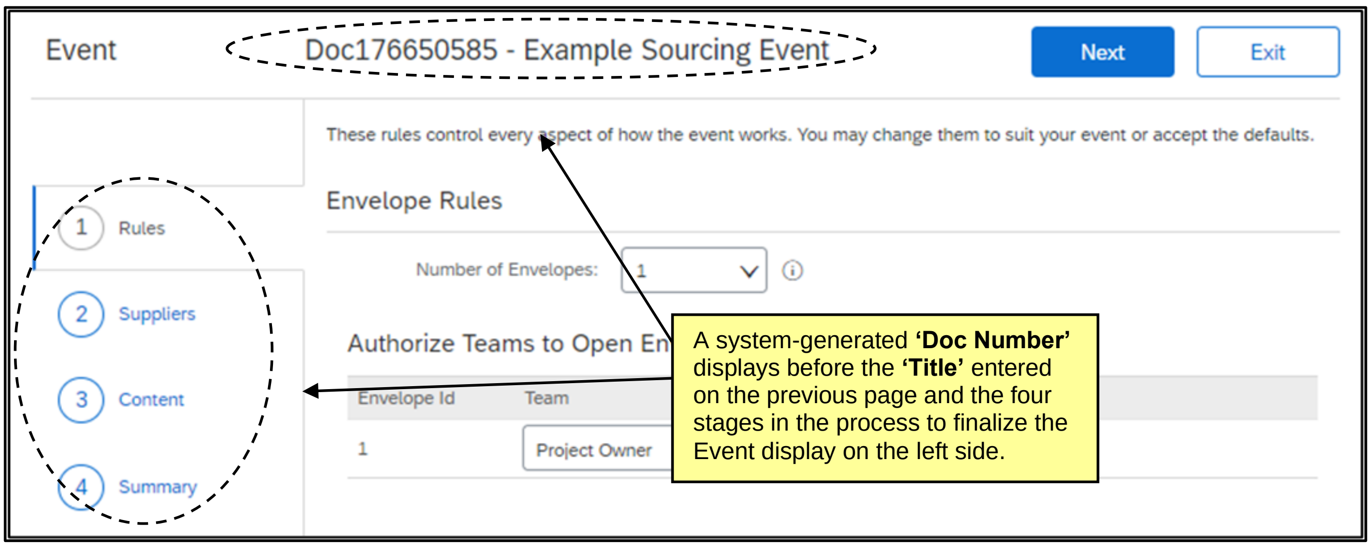
   All other fields can be left as defaulted, and **'Currency,' 'Commodity,'** and **'Departments'** will be pre-populated based on selections made when creating the Sourcing Project. Then click **'OK.'**

   Note: The **'Description'** field will pre-populate with "Instructions to Vendors." Leave those there and enter a description of the goods or services being solicited above.



3. The **'Event'** page will display and outline the four sections to be completed before publishing the Event: **'Rules,' 'Suppliers,' 'Content,'** and **'Summary.'**

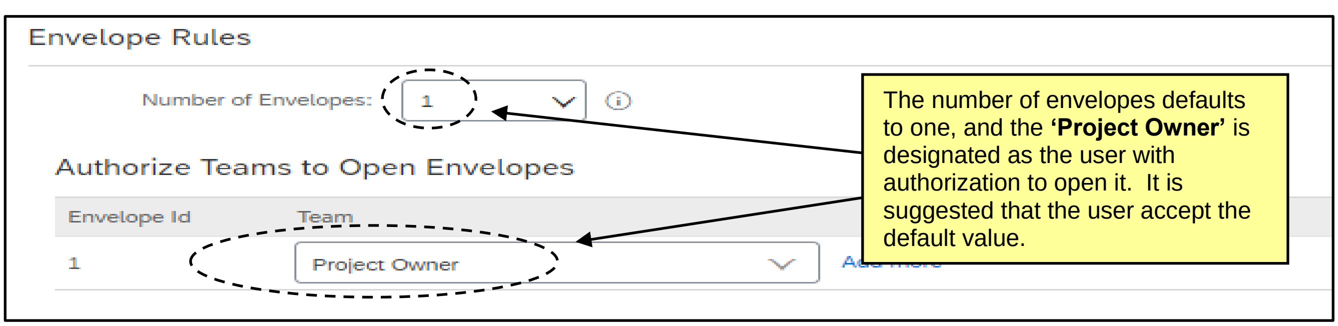
   Notes:
   - Users will skip section 2 for **'Suppliers'** until after sections 1 and 3 have been completed and the Sourcing Event has been approved (if necessary). The **'Tasks'** tab outlines this process and more information is provided in this document below.
   - The Event will be assigned a **'Doc Number'** by the system immediately preceding the Event **'Title'** entered on the previous page. This **'Doc Number'** will be used as part of the IPS **'Solicitation Number'** following the user's entity numerical/character prefix (i.e., **13**-82296023 or **DPC**-82296023 for Division of Purchase and Contract – This prefix should auto-populate in IPS).



II. Setting Event Rules

The first of the four sections to edit and set are the Event **'Rules.'** Most importantly, the rules section allows the Sourcing Agent to establish the **'Timing Rules'** outlining when the bidding starts and stops. Many of the fields within the six sub-sections on this page are pre-populated, and it is advised that users leave them as is.

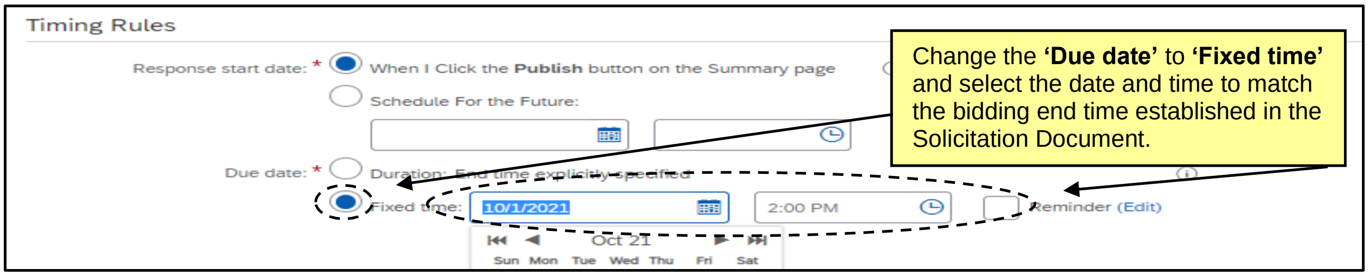
1. **'Envelope Rules'** is the first subsection. The system will default the event to having one envelope and lists the **'Project Owner'** as the user group with the ability to open the envelope. Envelopes are designed to conceal response information until after the **'Due Date.'** It is advised that the user leaves the default as is, but if they would like a multiple-envelope Event revealing different aspects of the response in layers, they can manually increase the number of envelopes up from one using the dropdown menu.



2. **‘Timing Rules’** is the next and most important section. There are two required fields that set when vendors can begin to respond with bids and when their bids are last due.

    a. **‘Response start date’** defaults to **‘When I click the Publish button on the Summary page,’** meaning that vendors can begin responding immediately once the Event is finalized by clicking **‘Publish.’** If the user would prefer to set a specific date in the future for when vendors can begin to respond, click **‘Schedule For the Future’** and set a specific date and time from the pickers.

    b. **‘Due date’** sets the time when the bidding period is closed. It defaults to a **‘Duration’** of 3 days, but it should be switched to a **‘Fixed time’** where the user can set a specific closing date and time from the pickers.



3. It is suggested that users leave all defaulted values as is for sections three through six. These four sections are **‘Bidding Rules,’ ‘Project Owner Actions,’ ‘Market Feedback,’** and **‘Message Board.’** When all Event **‘Rules’** have been set, click onto Section 3 for **‘Content.’**

III. Updating the Sourcing Event Content

The **‘Content’** section of the Event is where the user can share all information about the products or services they wish to receive bids on, and it serves as the framework for vendors to provide a response. The State has created an extensive template in this section that complements the default **‘Solicitation Document’** generated on the Sourcing Project, and it is advised that users follow the suggested outline.

1. The **‘Content’** stage is divided into six numerical sections, most of which have subsections:

    1) **Welcome to the State of North Carolina’s Sourcing Tool:** A brief welcome message for vendors.

    2) **Instructions on How to Use the Sourcing Tool:** Instructions and tips for vendors on how to provide a response within the tool.

    3) **Solicitation Document and Details:** Users will upload their completed **‘Solicitation Document’** in subsection **3.1**. Vendors will find instructions for submitting questions in subsection **3.2**, and pre-loaded, informational attachments in subsections **3.3** and **3.4**. If an **‘Addendum’** is required, users will post it here and it will become subsection **3.5**.

    4) **Vendor Information:** This section requires vendors provide their **‘Customer Number’** from their NC eVP account.

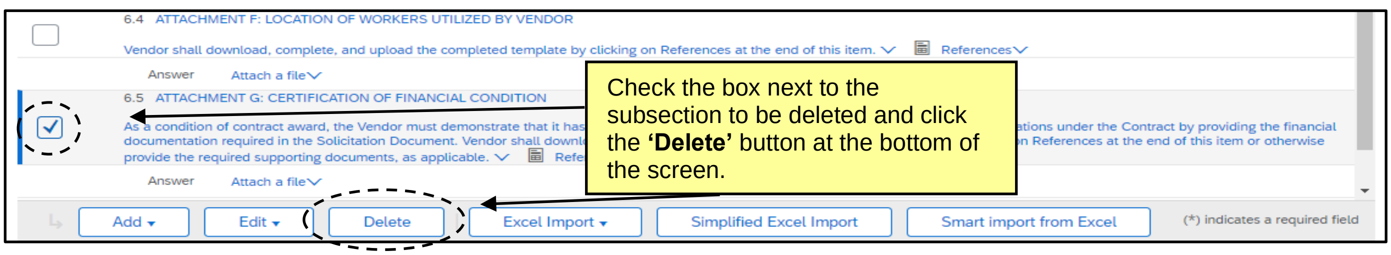
    5) **Pricing Submittal:** By default, the user will upload a customized pricing response template that vendors will download, complete with the prices they are bidding on the requested products or services, and re-upload to the Event as an attachment. **‘Line Item’** pricing can replace the default attachment response if desired.

6) **Vendor Response:** This section contains several subsections instructing the vendor to return completed documents to accompany their pricing submittal. No action is necessary by users in this section as all of the documents have been provided for the vendors, and most of the response fields are required by default to be completed by the vendor.

Note: In subsection **6.1** vendors will return a completed version of the **'Solicitation Document'** they downloaded in subsection **3.1.** The returned version of this document will include an **'Execution'** section to capture the vendor's signature. This section can be countersigned by the agency and is intended to be used as Contract Documentation for the winning bid at the conclusion of the Solicitation process.

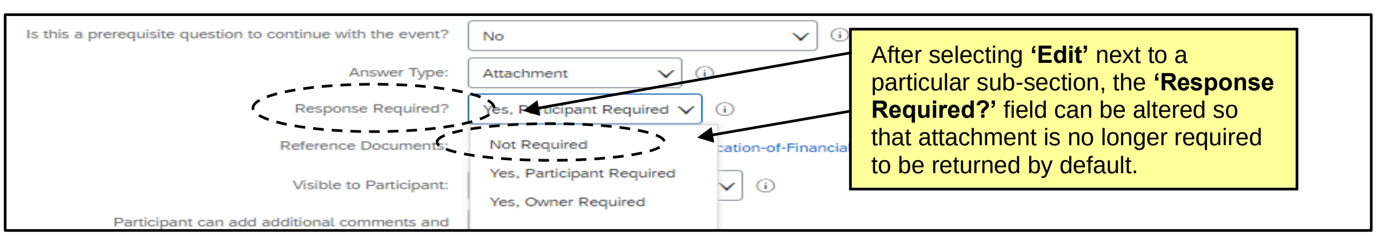
2. Scroll to **Section 6, 'Vendor Response.'** This section is populated with several subsections (more for **'Goods'** solicitations than for **'Service'** solicitations). These templates auto-populate based on what the user selected in the **'Approval Scenario'** field when creating their Sourcing Project. Most attachment subsections are required for vendors to complete by default. There is no action necessary for users in this section.

3. 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. If any changes to the default content are necessary, subsections can be added, edited, or deleted, although users should be very careful when doing this. To delete a subsection, check the box to its left and click the **'Delete'** button at the bottom of the **'Content'** section. That subsection will be removed (it cannot be undeleted), and the subsection numbering below it will automatically adjust.



4. To edit a subsection, check the box to its left and click the **'Edit'** button at the bottom of the **'Content'** section. From the subsequent dropdown menu, click **'Content.'**

5. The **'Edit Question'** page will display, although it is advised that no edits be made to default subsections. One potential field to change is the **'Response Required?'** field. This field defaults to **'Yes, Participant Required,'** but if the user would like to keep the attachment in the content but not make it a mandatory for the vendor to return, they can select **'Not Required'** from the dropdown menu and click **'Done.'**



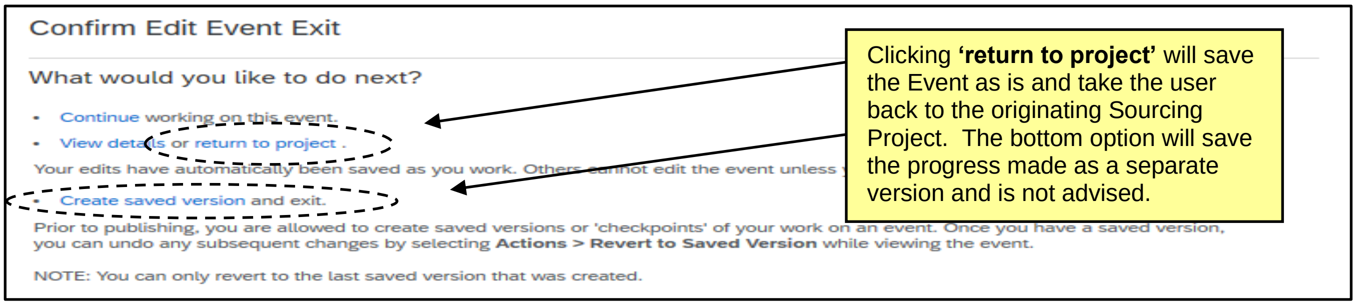
Notes:

- 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 no approvals are necessary, skip the next section of this document.

IV. Send Solicitation to P&C for Approval

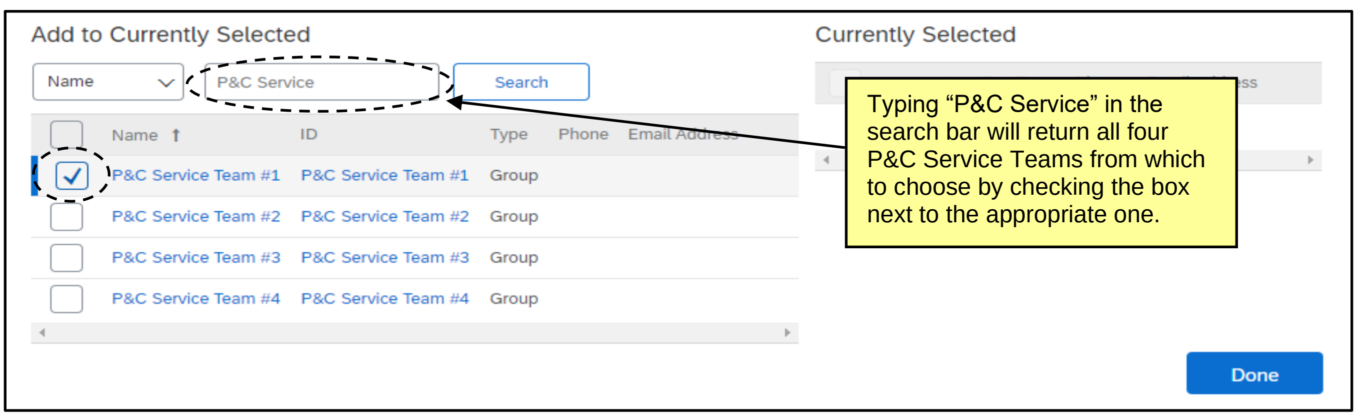
If the solicitation is over agency delegation, it needs to be approved by P&C before publishing. Users will do that via the built-in **'Gain P&C Approval of Sourcing Event'** task in **'Phase 04'** of the **'Tasks'** tab.

1. At this point the user should click the **'Exit'** button in the top right to save the Event. The **'Confirm Edit Event Exit'** screen will display providing the user with various options. Clicking **'return to project'** will save the Event as is and take the user to the originating Sourcing Project where they can begin the process to have the Event approved. The bottom option to **'Create saved version'** will save the progress made as a separate version, and the screen will include instructions on how to undo any subsequent changes. The bottom option works if desired but is not advised.

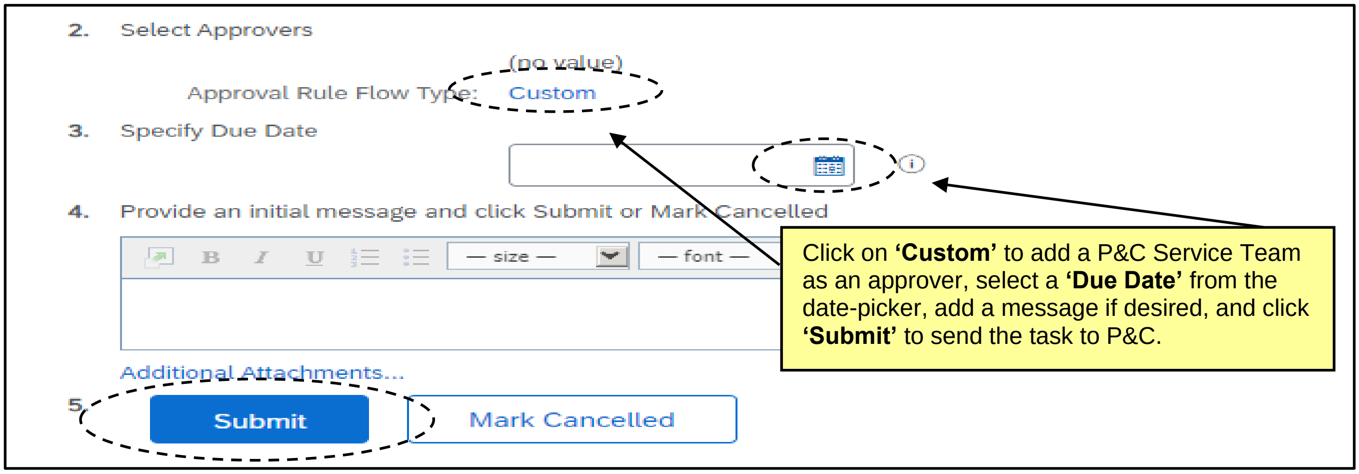


2. Navigate to the **'Tasks'** tab on the Sourcing Project and go to the **'Gain P&C Approval of Sourcing Event'** task in **'Phase 04.'** Click on the task and select **'View Task Details'** from the dropdown.

3. On the **'Approval Task'** page, click on the word **'Custom'** in the **'Select Approvers'** section, then click **'Add Initial Approver'** on the subsequent screen. Click the dropdown next to **'Add approver to approval flow'** and select **'Search more'** to find the appropriate P&C Service Team to which to send the approval request. On the next screen, type in "P&C Service," click **'Search,'** and check the box next to the Service Team representing the user's entity, then click **'Done.'** For future approvals, the Service Team can be selected directly from the dropdown after clicking **'Add Initial Approver.'**

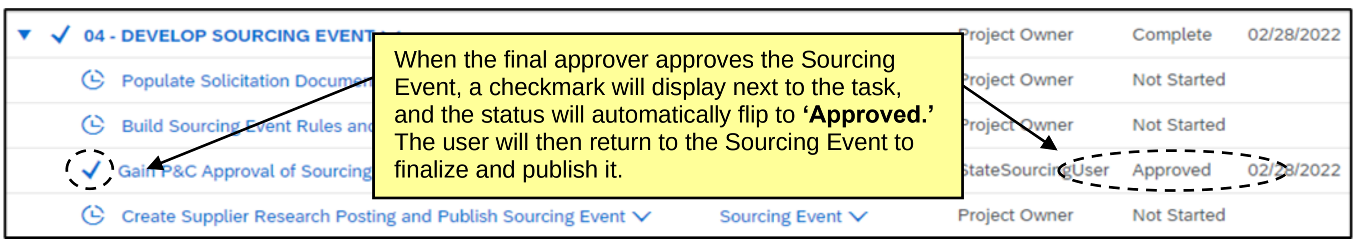


4. Back on the **'Approval Task'** page, add a **'Due Date'** from the date picker, a note to P&C if necessary, and click **'Submit.'**



5. On the **'Tasks'** tab, the task status will display as **'In Approval'** until it is completely approved, when it will automatically shift to **'Approved'** and a checkmark will appear to its left. The user can proceed to finalizing their **'Solicitation Document,'** then updating and publishing the **'Sourcing Event.'**

6. Navigate to the **'Documents'** tab, click on the Event, and select **'Edit'** to access and complete the Event.



V. Review the Timing Rules and Finalize the Sourcing Event Content

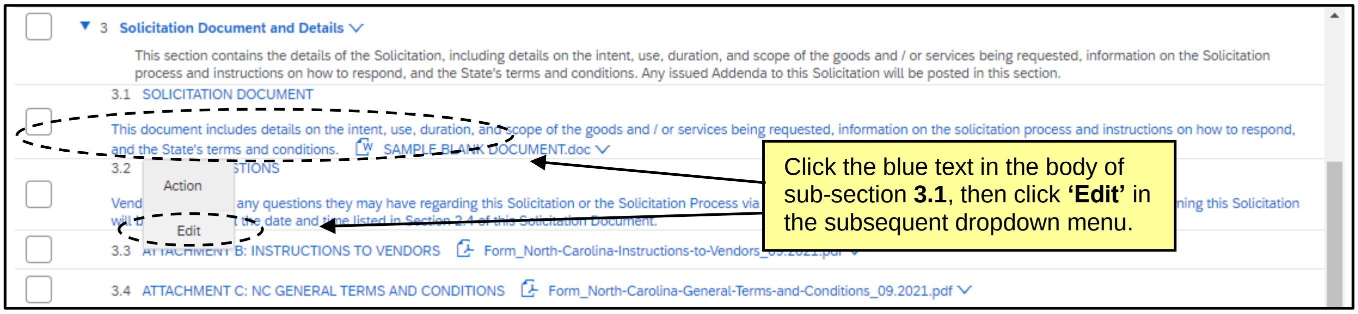
After receiving approval from P&C, users should finalize and PDF their **'Solicitation Document'** then return to **Section 1 (Rules)** of the **'Sourcing Event'** to update any dates that may have changed during the approval process, and **Section 3 (Content)** to attach the final version of the **'Solicitation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

1. Clicking on the **'Draft'** version of the Sourcing Event from the **'My Documents'** portlet will take the user directly into **'Edit'** mode, but if accessing the Sourcing Event from the **'Documents'** tab within the Sourcing Project, the user must select **'Edit'** from the dropdown.

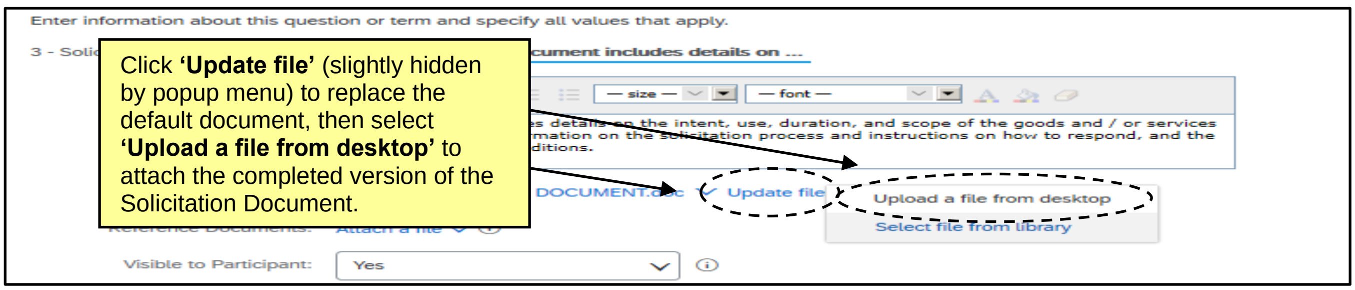
2. Verify the **'Due date'** under **'Timing Rules'** in **Section 1 (Rules)** has not changed during the approval process**.** If it has, update the **'Fixed time'** accordingly.

3. Navigate to **Section 3 (Content)** to add the finalized version of the **'Solicitation Document'** in **subsection 3.1** and make any other necessary adjustments.

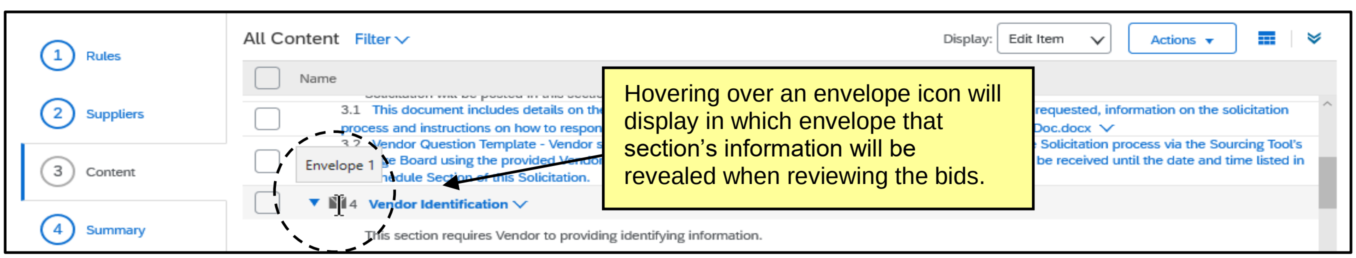
4. Scroll to **Section 3**, **'Solicitation Document and Details.'** A **'SAMPLE BLANK DOCUMENT.doc'** is attached to **subsection 3.1** by default. To replace this document, click on the blue text in the body of **3.1** and select **'Edit'** from the subsequent dropdown menu.



5. The **'Edit Attachment'** page displays. Click **'Update file'** next to **the 'SAMPLE BLANK DOCUMENT.doc'** file, then attach the finalized Solicitation Document by selecting **'Upload a file from desktop'** and click 'OK' after selecting the file, then click **'Done'** on the subsequent screen.



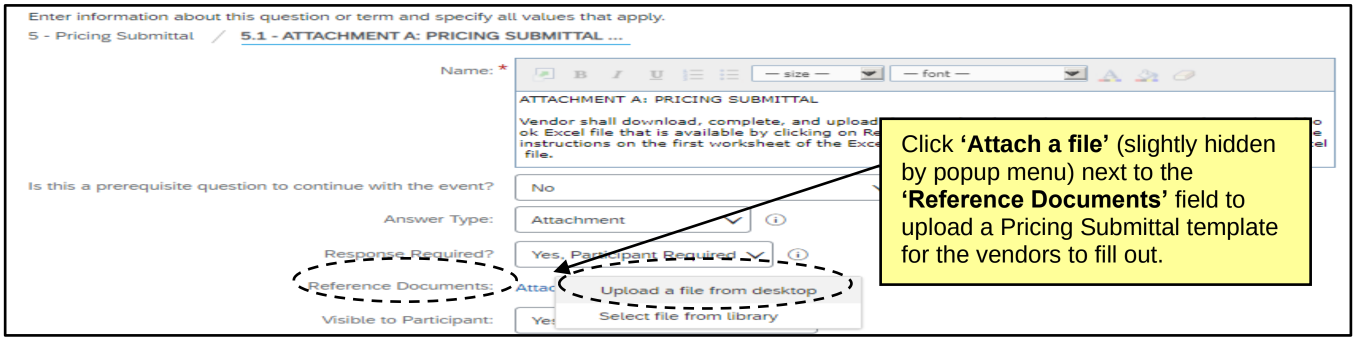
6. There is no action necessary in **Section 4, 'Vendor Identification.'** Note the envelope icon next to the number and hover the cursor over it to display in which envelope that section's answers will be revealed if the default is changed to more than one. To set the Envelope in which a section's answers will be concealed, check the box to the left of the section, click **'Edit,'** and select **'Content'** from the dropdown, then set the number from the **'Envelope'** field dropdown.



7. In **Section 5, 'Pricing Submittal,'** vendors will attach their pricing responses to the products or services being bid upon. The user must provide a template for vendors to populate. In **subsection 5.1**, duplicate the steps performed in **subsection 3.1** (Step 4) by clicking on the blue text in the body of the subsection and selecting **'Edit'** from the dropdown menu.

8. Navigate to the **'Reference Documents'** field and click the **'Attach a file'** link. Add the Pricing Submittal template the vendor needs to fill out and click '**Done.'** Vendors are instructed to download this template to fill out with their pricing and re-upload it for the user to review.

   Note: Microsoft Excel is the default format for this attachment. If the user prefers to attach this document in another format, remember to update the wording in the **'Name'** field when adding the attachment.



9. Users have the ability to add **'Line Items'** directly into the **'Content'** of the Event if they'd prefer vendors provide their pricing response directly into the tool as opposed to attaching it in a document. The benefits of this will be realized when the user compiles response information for the bid tabulation. For further guidance on this process, please see the **'Adding Special Content to a Sourcing Event'** job aid.

VI. Create Supplier Research Posting and Publish on Ariba Discovery

Once the Rules and Content are finalized, users will be ready to go back to the section they previously skipped, **Section 2 (Suppliers)**. In this section, the user will **'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. Once the Sourcing Event is later published, a URL will be available, and the user can copy and paste that URL in the **'NCEP URL'** field within the IPS posting. Vendors wishing to respond to the solicitation will then follow that URL and respond withing this Sourcing Event.

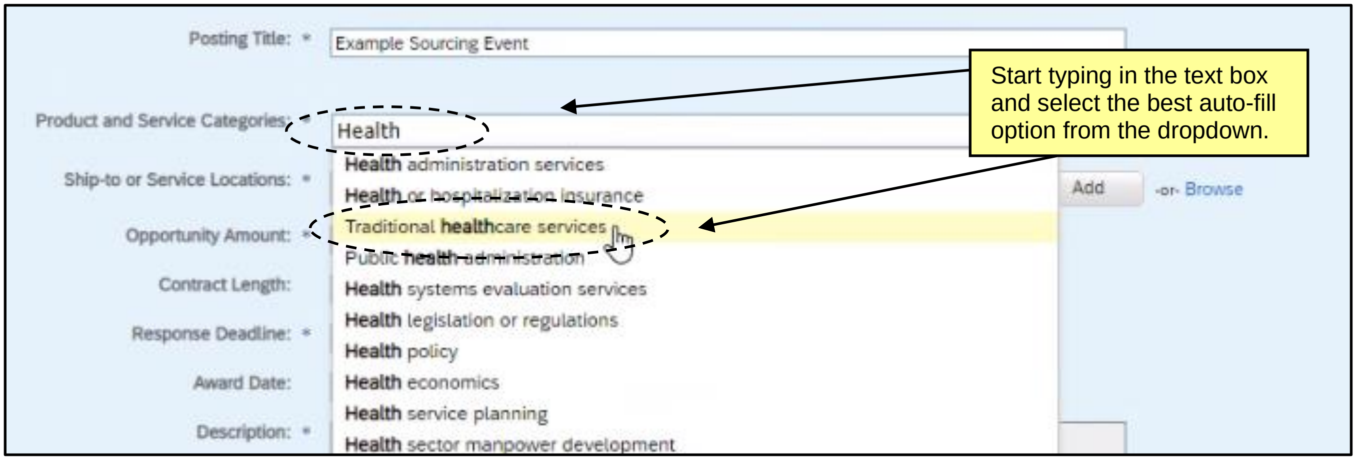
Additionally, this information, when published on **'Ariba Discovery,'** will reach an audience of prospective bidders who may not currently be registered in IPS, thus expanding the pool of potential bidders.

1. Navigate to **Section 2 (Suppliers).** The **'Create a Supplier Research Posting'** page will display.

2. Populate all relevant fields, including the six required fields, as noted by an asterisk (*). Some fields will be pre-populated based on information the user has already entered in the Sourcing Event, and other information will need to be added by at this point.

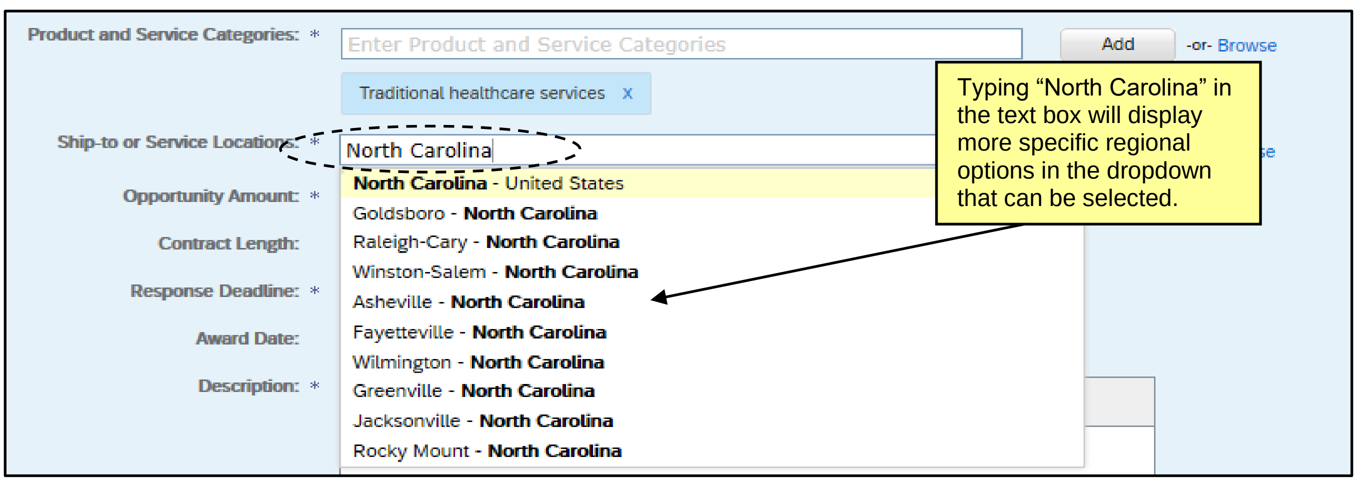
3. **Posting Title*:** The first field in the blue section of the screen will be pre-populated based on the information entered in the **'Title'** field when first creating the Sourcing Event. Remember, this title will be public-facing.

4. **Product and Service Categories*:** This field is not pre-populated. It corresponds with the **'Commodity'** field describing the nature of the solicitation in both the Sourcing Project and in the IPS posting. This selection will be used to alert **'Ariba Discovery'** vendors of the bidding opportunity. To select a category, begin typing into the text box. The system will auto-fill with suggestions in the dropdown. Click on the option that best fits the solicitation.



5. The selection will appear in a blue box below the field box.

6. **Ship-to of Service Locations*:** Type “North Carolina” in the text box, and from the dropdown choose the area that best matches the location of the user. This selection will be used to alert **‘Ariba Discovery’** vendors of the bidding opportunity. The selection will appear in a blue box below the field box.



7. **Opportunity Amount*:** Select a dollar amount range from the dropdown for what is the estimated value of the solicitation. Zero dollars is recommended.

8. **Contract Length:** Enter the length of the contract in months. This field is not required.

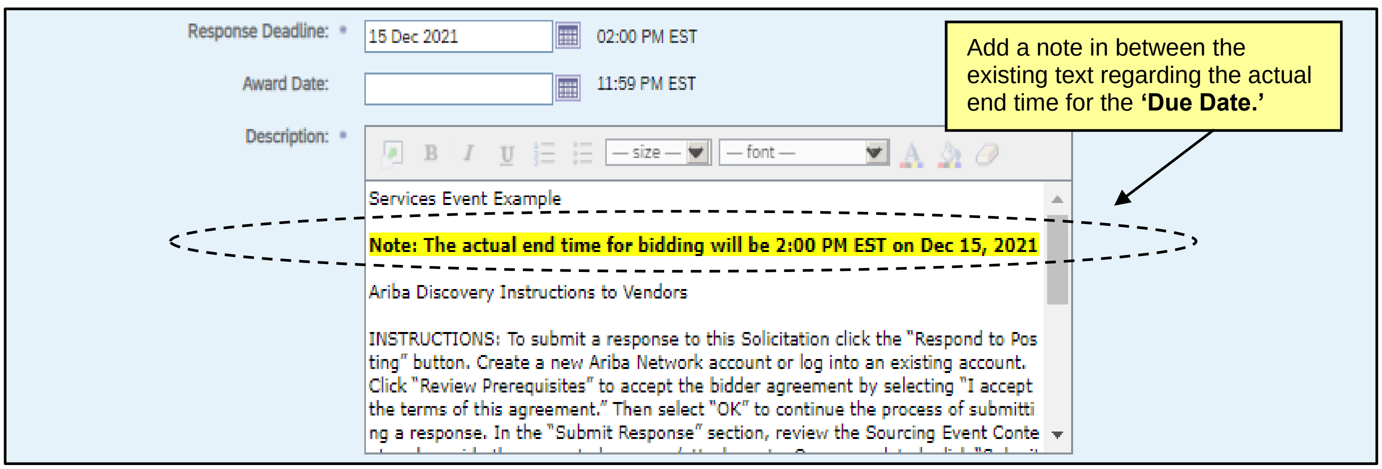
9. **Response Deadline*:** This will pre-populate with the **'Due Date'** and time set in the **'Rules'** section.

   Note: If is important to verify the information in this field matches the expected bid closing time. Although the date can be adjusted on this page, the time cannot. If it does not match, return to **Section 1 (Rules)** and reset the **'Fixed time,'** the click **'Next'** to return to the **Section 2 (Suppliers).** Information on the above fields will need to be re-entered, but it is important to display the correct end time for the Event.

10. **Award Date:** If the user knows the date on which they intend to award the solicitation, they can enter it here, but this field is not required.

11. **Description*:** This field will be pre-populated based on the information entered in the **'Description'** field when first creating the Sourcing Event.

    Note: The listed end time for bidding **'Due Dates'** in **'Ariba Discovery'** from the vendor's perspective is sometimes displayed in a different time zone, and this cannot be edited. It is recommended that users add a note in the **'Description'** field reiterating the actual Eastern Time Zone end time that's already been established in the Sourcing Event. This should be inserted in between the solicitation description and the "Instructions to Vendors" and be highlighted and bolded for greater visibility.



12. **Attachments:** There is no need to add any attachments to this page.

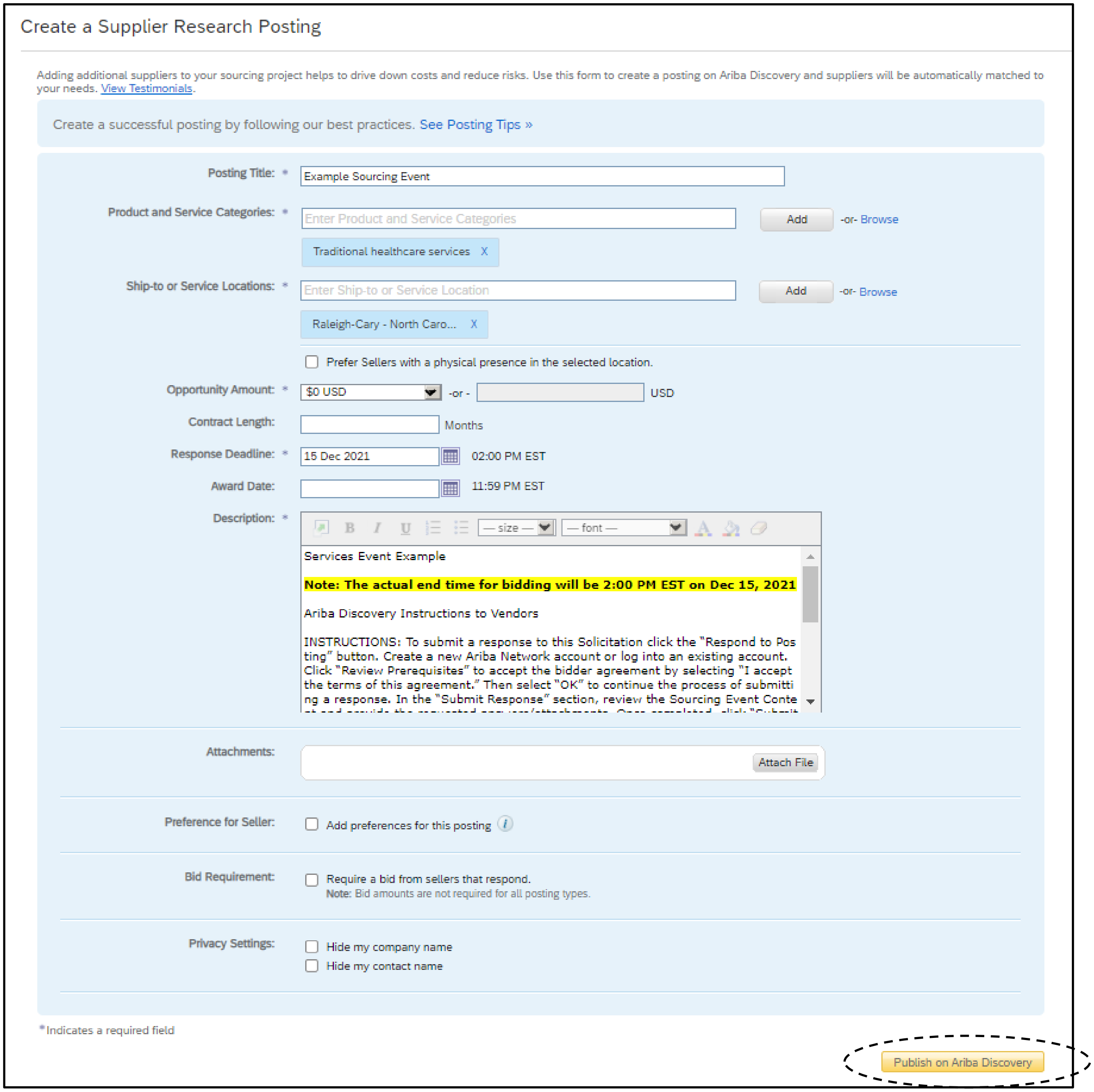
13. **Preference for Seller:** This field is unchecked by default and it is advised the user leaves it as such.

14. **Bid Requirement:** This field is unchecked by default and it is advised the user leaves it as such.

15. **Privacy Settings:** This field is unchecked by default and it is advised the user leaves it as such.

16. When all fields have been populated, the user should click the **'Publish on Ariba Discovery'** button at the bottom of the screen.

    Note: Navigating away from this page before clicking the **'Publish on Ariba Discovery'** button will result in the entered information being lost (as mentioned in Step 9).

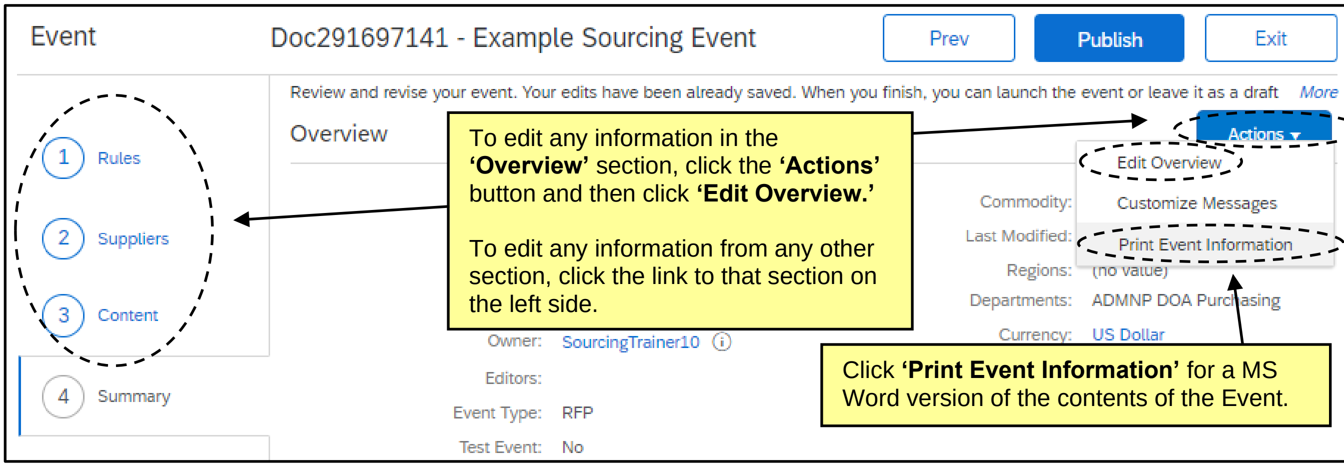


VII. Summary Section and Publishing the Event

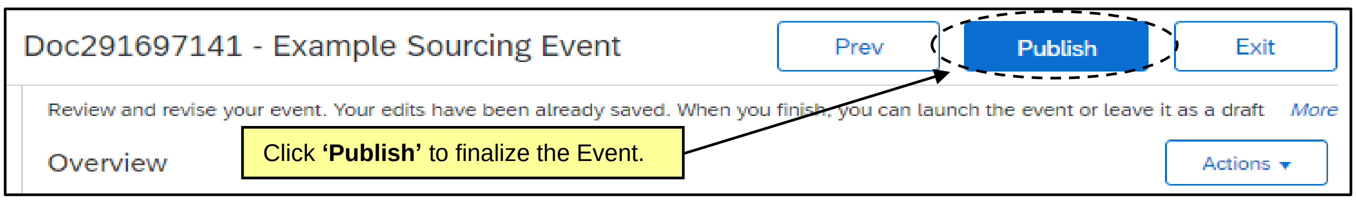
When **Section 2 (Suppliers)** is complete, users can proceed to the final **'Summary'** section. This contains the summary of the first three sections and allows the user to review and edit before clicking **'Publish.'**

1. The **'Overview'** information is at the top of the page, above the **'Rules,' 'Suppliers,'** and **'Content'** information in descending order. To edit any of the **'Overview,'** click the **'Actions'** button and select **'Edit Overview'** from the dropdown menu. If any other sections need to be edited, click on that section on the left side of the screen.

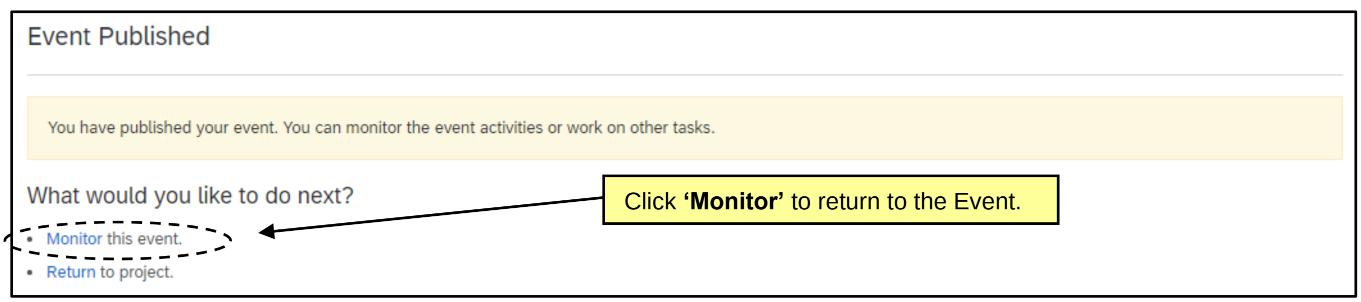
2. For a summary of the entire contents of the Event in the form of a MS Word document (which may be helpful to refer to when posting Event information to IPS), click the **'Actions'** button and select **'Print Event Information,'** and the system will generate an up-to-date, time-stamped document.



3. The user can now click the **'Publish'** button to finalize the Event.

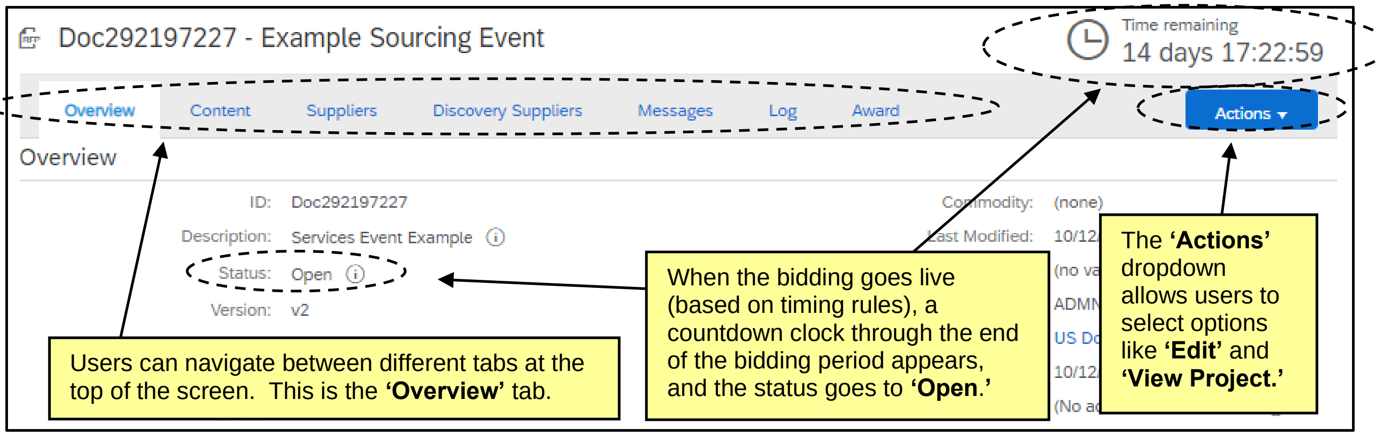


4. The **'Event Published'** page displays, and the user will have the option go back to the Event by clicking **'Monitor'** or return to the overall Project. It is advised to select **'Monitor'** to verify the countdown clock for the Event **'Due date'** is accurate.



5. Upon returning to the Event, the user will find seven tabs at the top of the screen**.** The **'Overview'** tab is where the **'Rules'** are summarized along with a **'Version History'** section towards the bottom of the page. Other tabs are **'Content,' 'Suppliers,' 'Discovery Suppliers,' 'Messages,' 'Log,'** and **'Award,'** although the **'Award'** tab can be ignored. Clicking the **'Actions'** button will display several options including **'Edit'** to make any necessary changes, and **'View Project'** to navigate directly back to the Sourcing Project within which this Event exists.

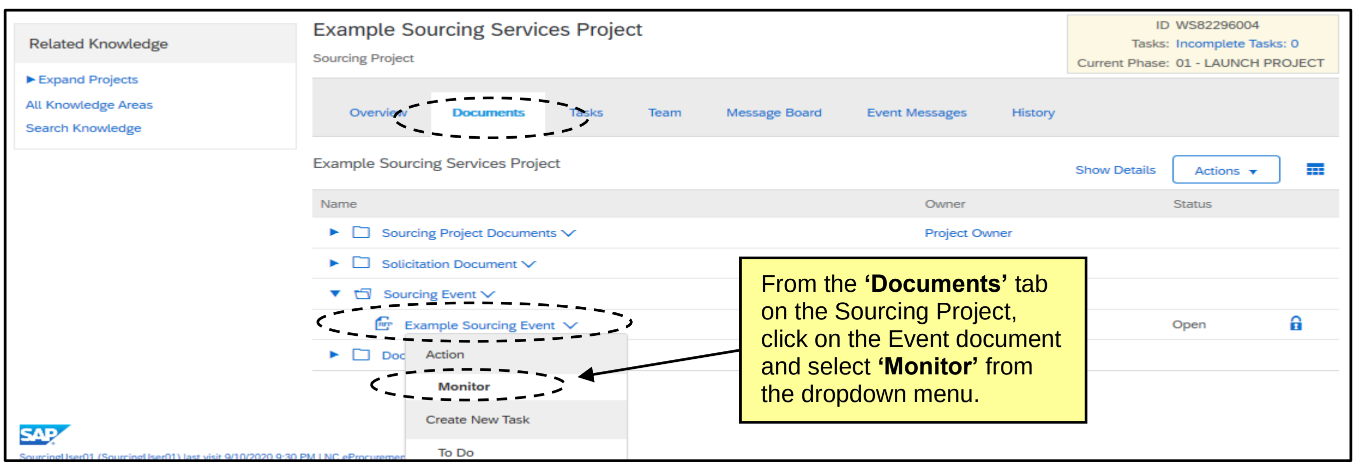
6. Based on the timing rules established, it may immediately be **'Open'** to receive bids, as is the case below. A clock will appear in the upper right counting down how much time is left until the bidding period ends.



VIII. Managing a Published Event and Responding to Vendor Questions

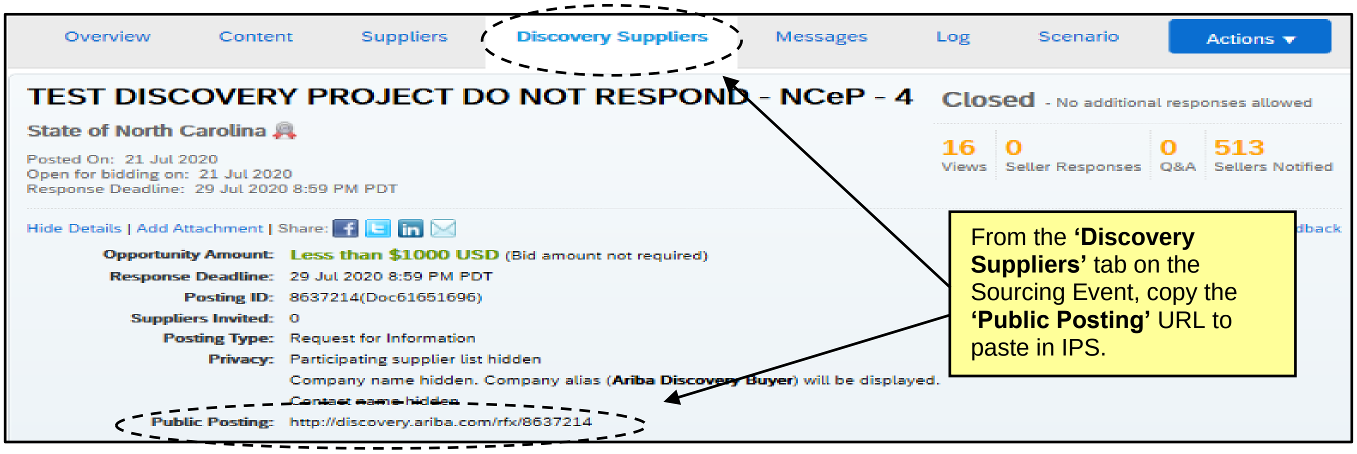
Once the Event has been published, **Phase 4** of the Sourcing Project will be complete, and the user should move on to **Phase 5**. The first task in **Phase 5** is to **'Post Sourcing Event Summary and Link to Sourcing Event on IPS.'** Posting the link within IPS will give vendors interested in responding the ability to access the Event via their Ariba Network accounts and a path to an electronic response. During the Event, if responders have any questions, they will submit them via the Event message board, and if necessary, the user can address those questions by posting an **'Addendum'** in the Event before responders submit their final bids.

1. If the user is not already in the Event, go to the **'Documents'** tab on the Sourcing Project, click on the Event document and select **'Monitor'** from the dropdown menu.

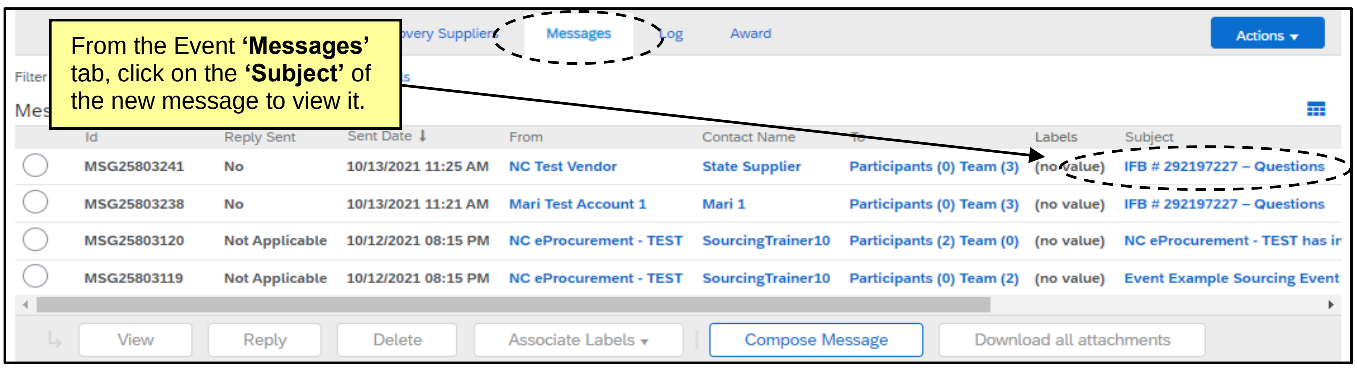


2. Click on the **'Discovery Suppliers'** tab and copy the URL in the **'Public Posting'** field. Go to IPS and populate the Solicitation Posting as instructed by P&C.

   Notes:
   - The copied URL should be pasted in the **'NCEP URL'** field.
   - The **'Solicitation Number'** field will be the system-generated **'Doc Number'** (found at the top of the Sourcing Event) pasted after the user's auto-populated entity numerical/character prefix.

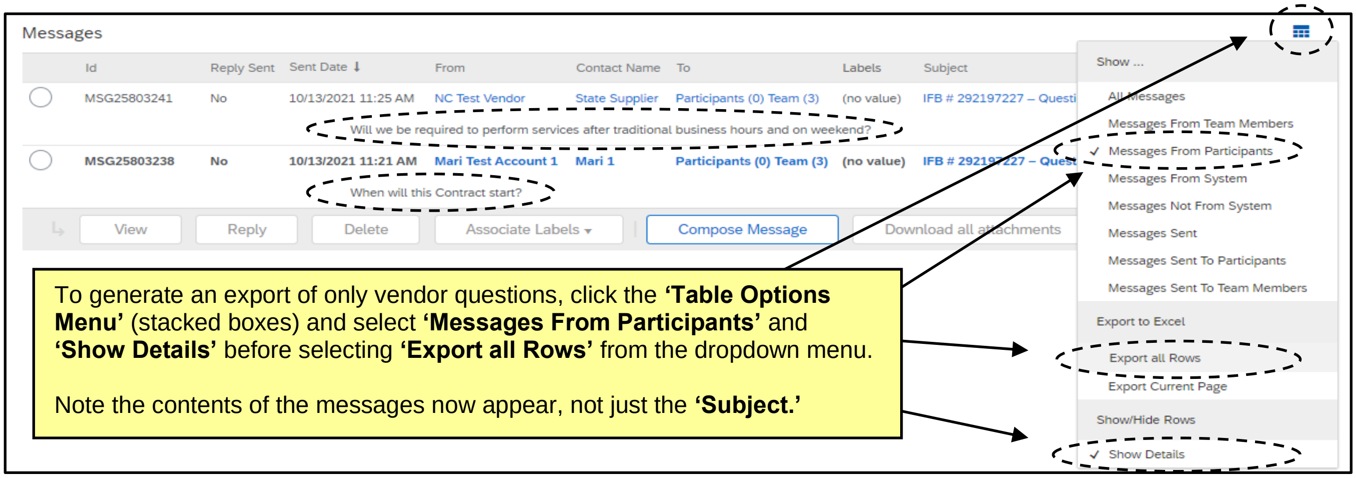


3. If a vendor has any questions during the Q&A period, they are instructed to submit them via the Event Messages page. A notification will appear on the user's home page when a message is received, or a user can check the **'Messages'** tab on the Event at any time to see these messages. Click on the **'Subject'** of the new message to read it.

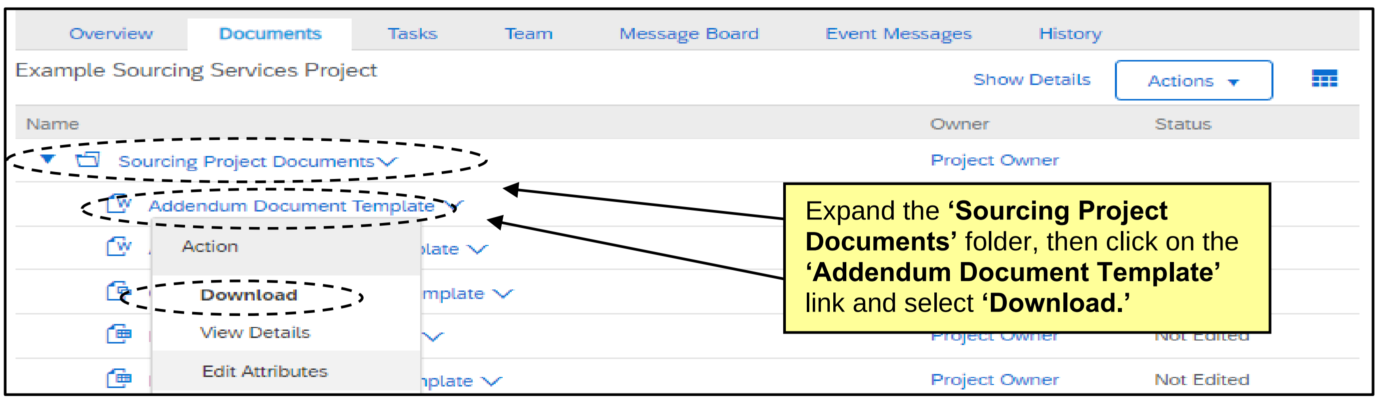


4. The **'View Message'** page will display, and the user can see the vendor's questions.

5. If the user would like to generate an export of only the vendor questions within the Event **'Messages'** tab, they can click the **'Table Options Menu'** icon (stacked boxes) below the **'Actions'** button, then select **'Messages From Participants'** and **'Show Details'** from the dropdown. Finally, they can select **'Export all Rows,'** and an Excel download of all vendor questions will be created.

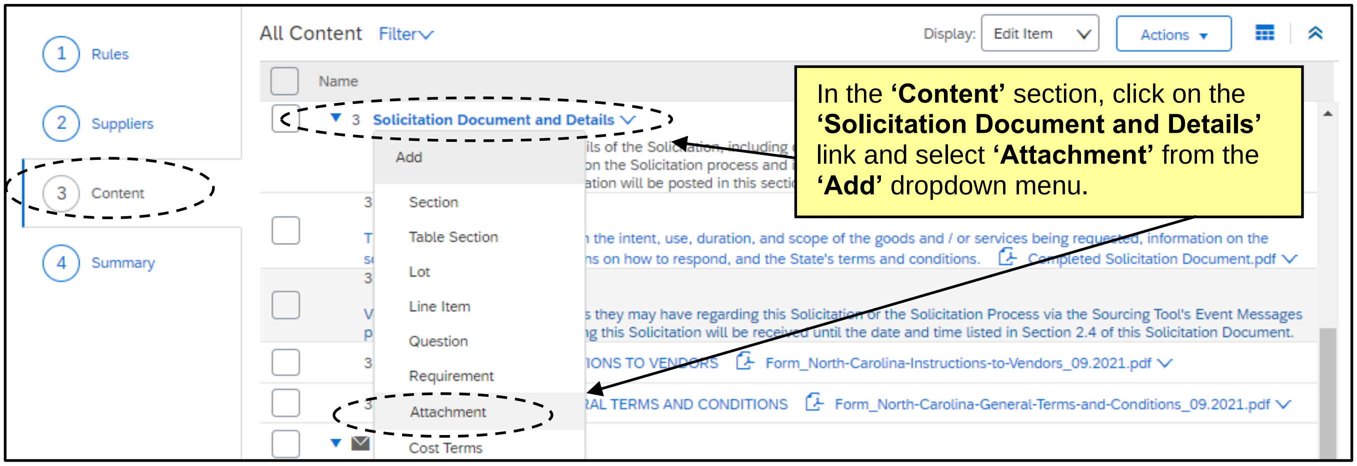


6. When the Q&A period is over and all vendor questions have been reviewed, the user may need to create an **'Addendum'** to address the questions. From the **'Documents'** tab on the Project, expand the **'Sourcing Project Documents'** folder, then click on the **'Addendum Document Template'** link and select **'Download.'** Fill the document out, rename it, and save it back into the Project.

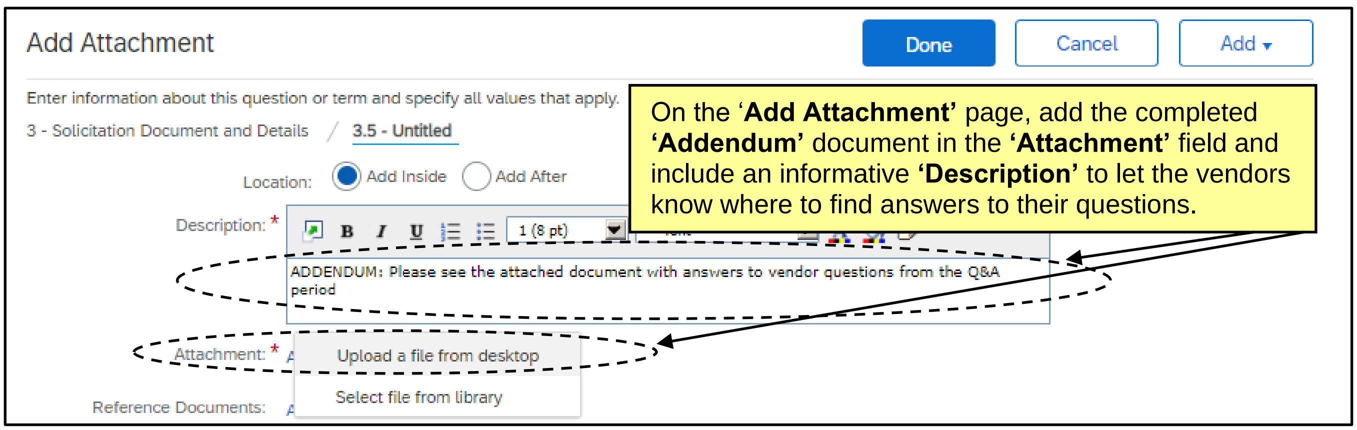


7. **'Monitor'** the Event again from the Project's **'Documents'** tab, and then navigate to the Event **'Content'** tab. Click the **'Actions'** button in the top right and select **'Edit'** from the dropdown menu.

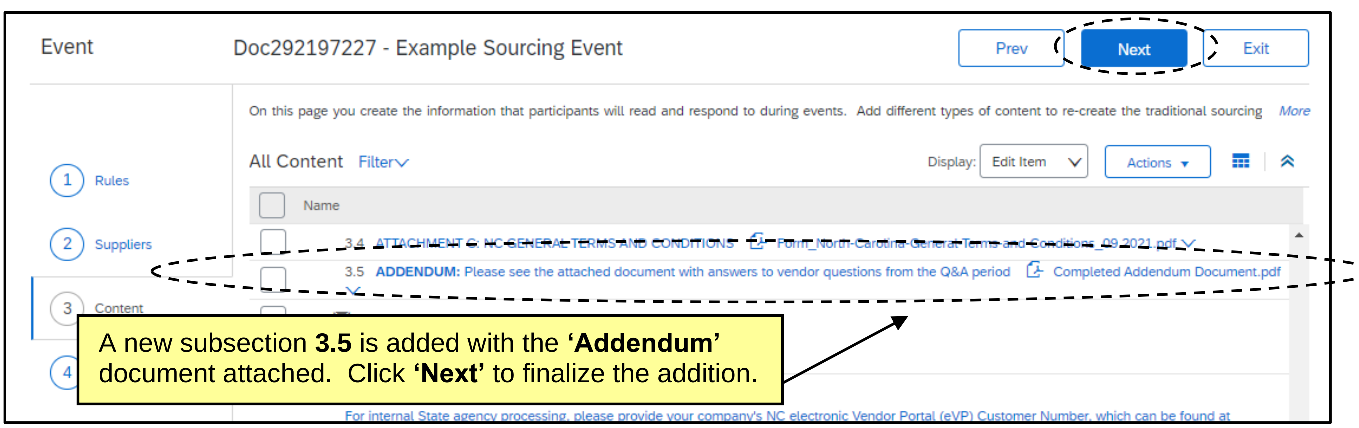
8. Click the **'Content'** link on the left side of the screen, click on the **'Solicitation Document and Details'** link next to **3,** and select **'Attachment'** from the **'Add'** dropdown menu.



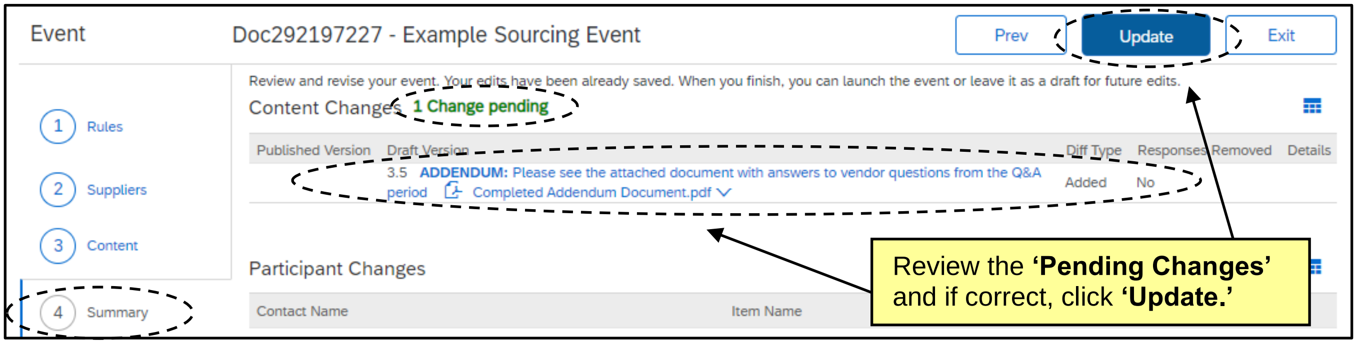
9. The **'Add Attachment'** page will display, and the attachment will automatically be assigned to subsection **3.5.** Attach the completed **'Addendum'** document in the **'Attachment'** field. Add a **'Description'** to let the vendors know this is where they can find the answers to their questions and click **'Done.'**



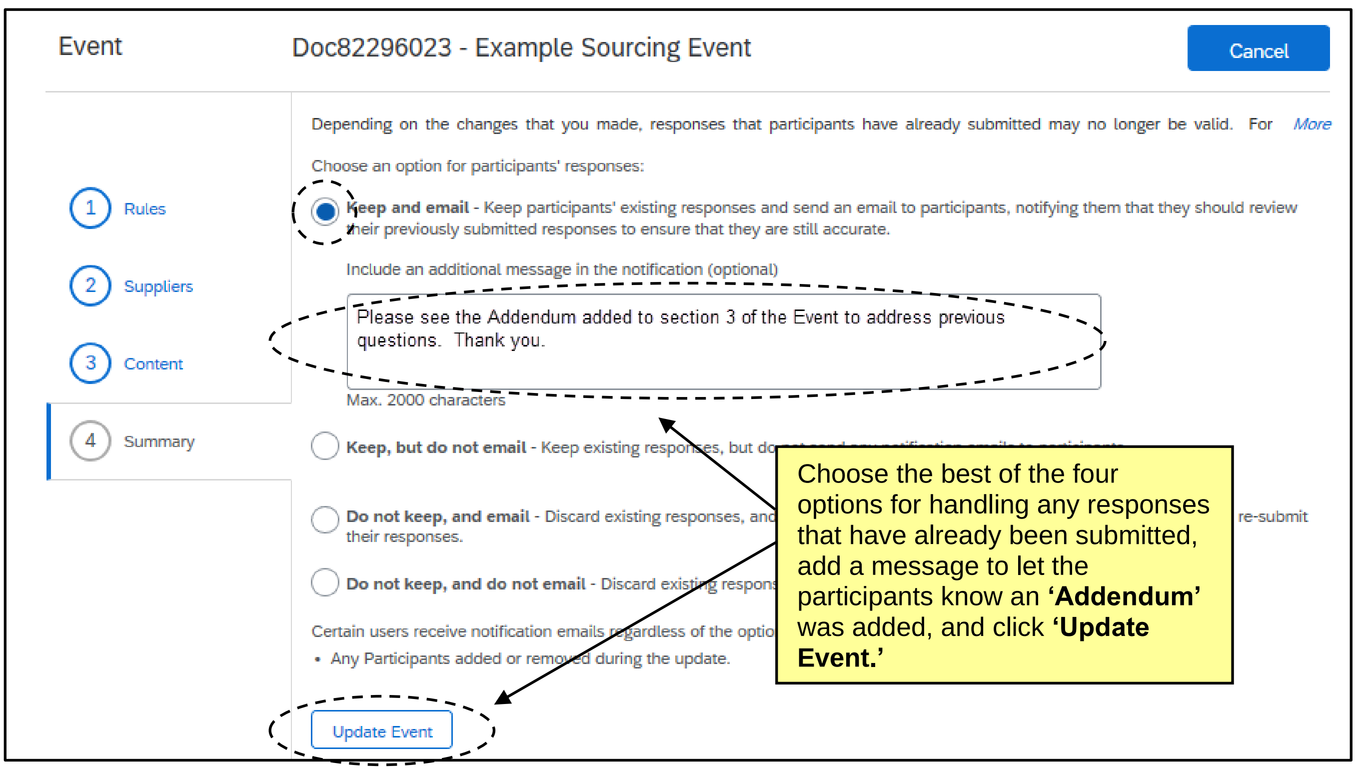
10. The newly added subsection **3.5** will now display with the **'Addendum'** document attached for the vendors to review. Click **'Next.'**



11. The **'Pending Changes'** will display in the **'Summary'** section where the user can review the change before finalizing it by clicking **'Update'** in the top right.



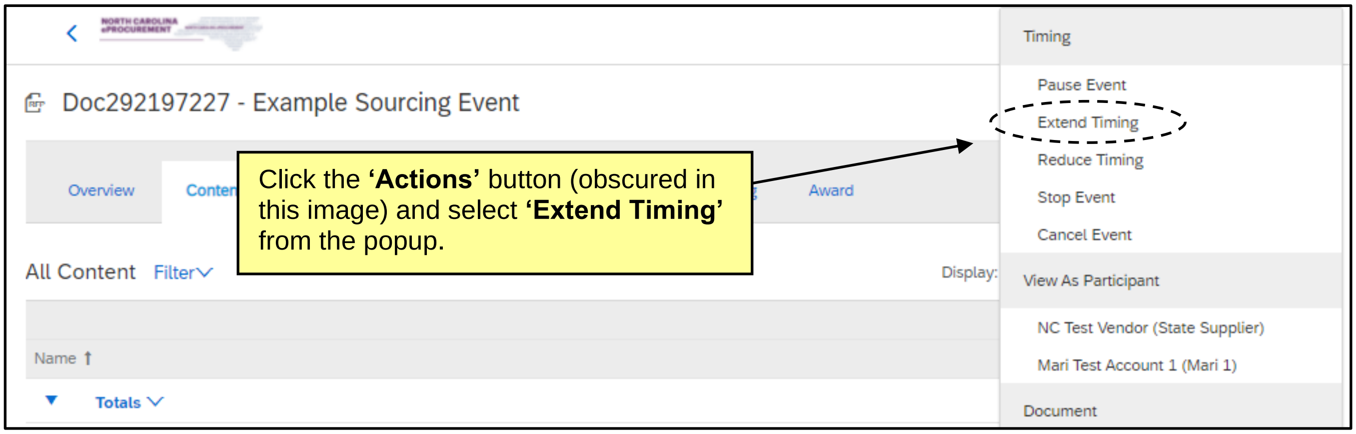
12. A final review page will display giving the user four options for handling any responses that may have already been submitted by vendors. **'Keep and email,' 'Keep, but do not email,' 'Do not keep, and email,'** and **'Do not keep, and do not email.'** Select the option that makes the most sense given the situation per guidance from P&C and add a brief message in the box to let the vendors know that an **'Addendum'** has been added. Click **'Update Event'** to officially attach the **'Addendum,'** and the user will be given the option to return to the Event or go the Project.



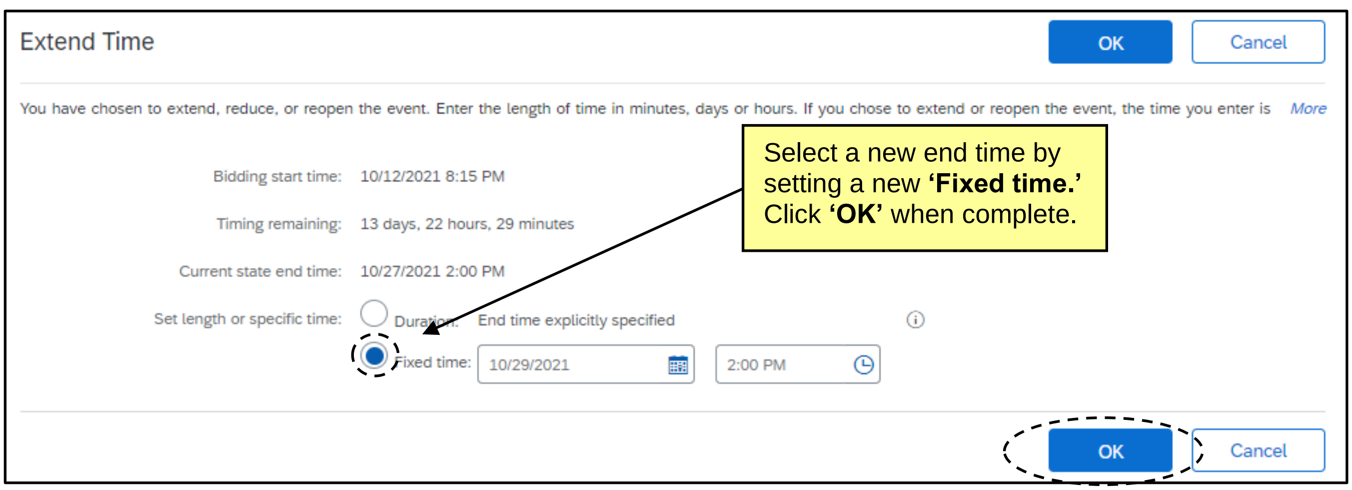
IX. Editing the Timing on a Published Event

Sourcing Agents have the ability to change the timing on a published Event if necessary. Although it is not advised to reduce the amount of time vendors have to respond, there might be some scenarios where the timing needs to be extended, and there are two steps required, including updating the **'Discovery Suppliers'** tab, before posting notice in IPS per P&C guidelines.

1. From the Event, click on the **'Actions'** button in the top right. A popup menu will display and the **'Timing'** options will be at the top. Click on **'Extend Timing.'**

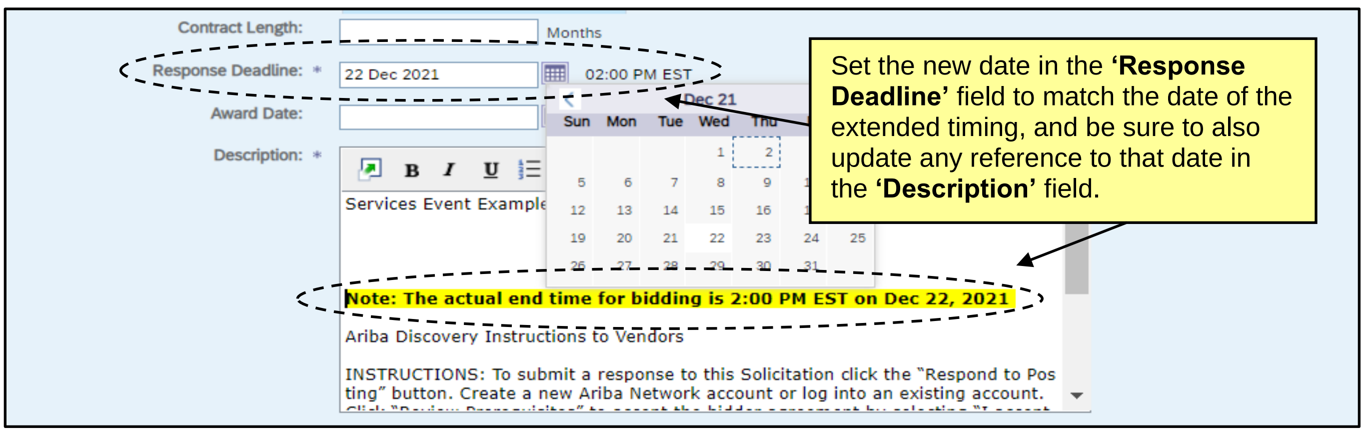


2. On the subsequent **'Extend Time'** page, note the current start and end times, and then set a new, later end time. The new end time can be extended by switching the radio button to **'Fixed time'** and choosing the new date and time via the pickers, then clicking **'OK.'**



3. The new end time will now be reflected in the countdown clock in the top right. The user should then navigate to the **'Discovery Suppliers'** tab and click **'Manage Posting.'**

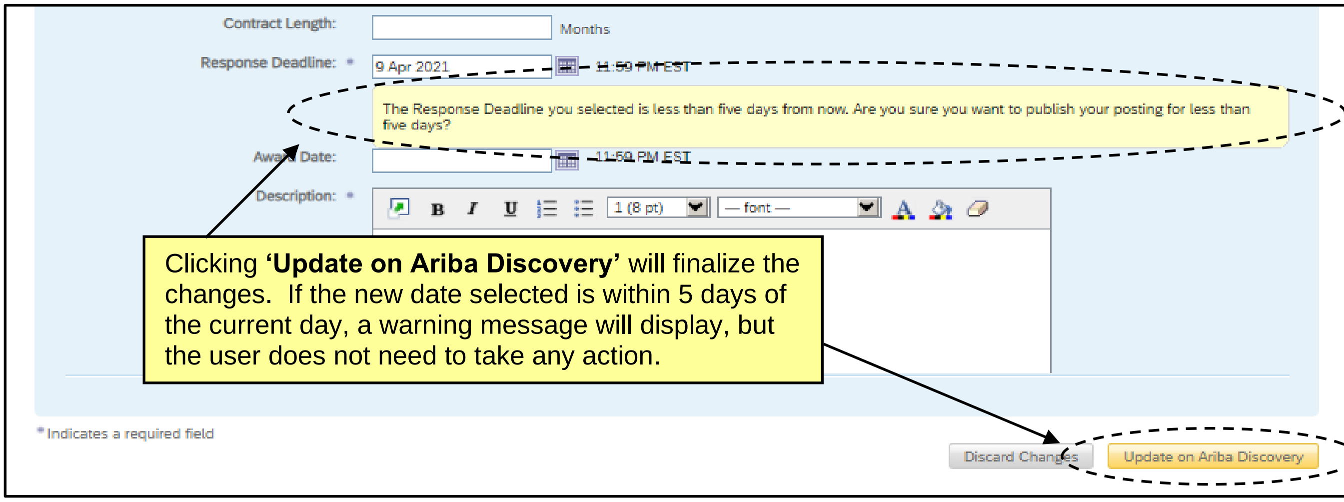
4. In the **'Response Deadline'** field, set the new **'Due Date'** to match the date updated during the **'Extend Time'** step. Be sure to also update any text referring to the **'Due Date'** in the **'Description'** field.



5. When all edits have been completed, click the **'Update on Ariba Discovery'** button in the bottom right to finalize the changes so that the **'NCEP URL'** link posted in IPS stays active for the duration of the extended event.

Notes:

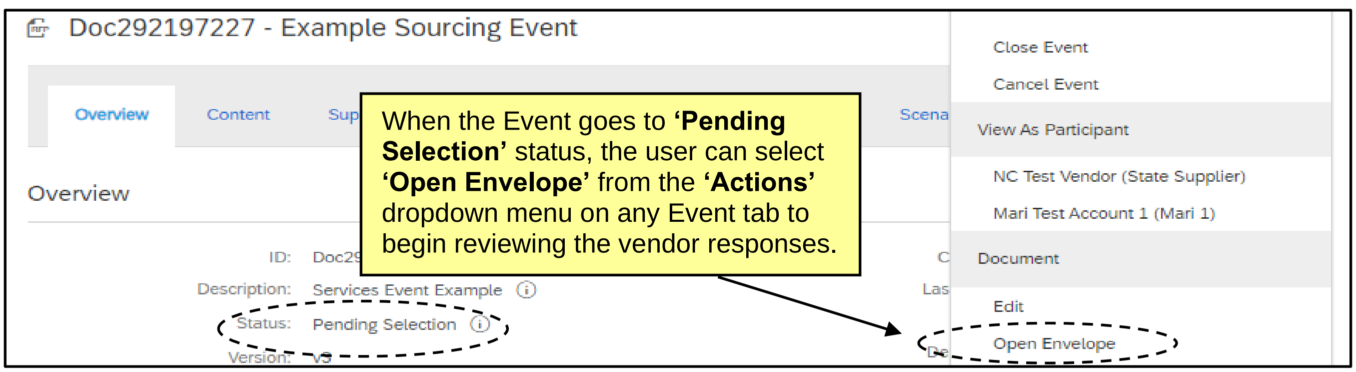
- When a change is made to the timing of a published event, the Sourcing Agent should update IPS accordingly. Please refer to P&C's guidance for specific instructions.
- If the new date selected is less than five days from the current date, a warning message will appear to notify the user. No action is needed to override the message.
- If the opening time has shifted back (i.e., from 11:00 AM to 2:00 PM), the **'Response Deadline'** date should be shifted one day past the actual date to make sure that the Discovery link stays open through the entirety of the Sourcing Event countdown clock (otherwise new vendors will be locked out between 11:00 AM and 2:00 PM in the example above). This will not allow vendors to submit responses past the deadline.



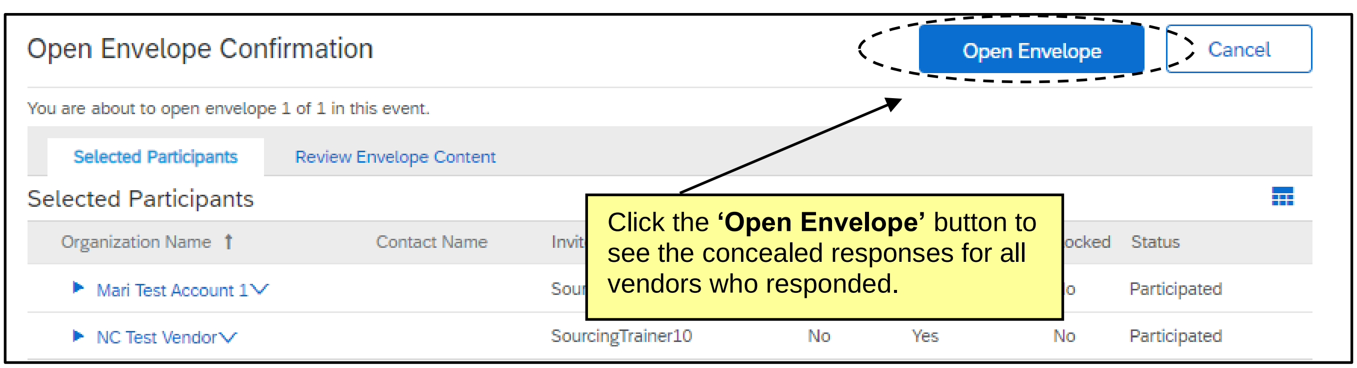
X. Reviewing Responses and Requesting Clarification or a BAFO

When the Event reaches the response due date, the event status becomes **'Pending Selection.'** At this point the user can open the **'Envelope'** to review the responses.

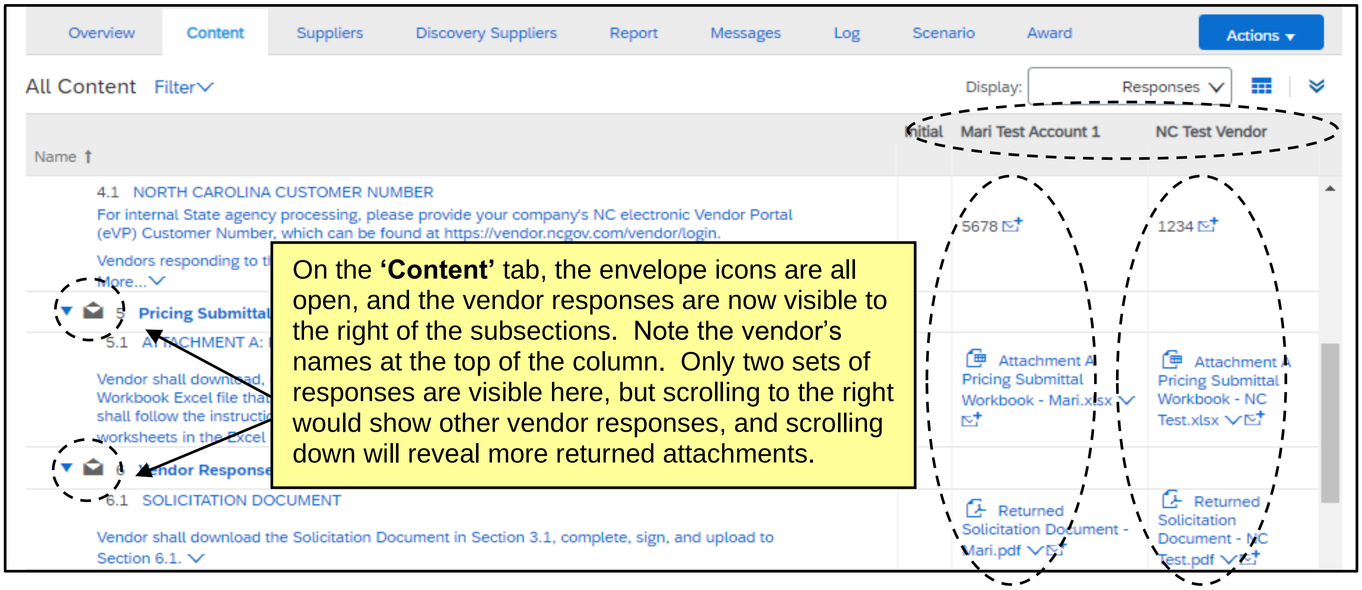
1. When the bidding is closed, the Event will go to a **'Pending Selection'** status. At that time, the user can click the **'Actions'** button in the top right (obscured by the popup menu in the image below) and select **'Open Envelope'** to begin to review the bids.



2. The **'Open Envelope Confirmation'** page will display a list of the participating vendors. Click **'Open Envelope'** to compare the responses.



3. Navigate to the **'Content'** tab if not already there and scroll down to see the responses revealed to the right of Sections 4 through 6. The vendor's name will display at the top of the column, and if there are several responses, the user will have to keep scrolling to the right to see them all.

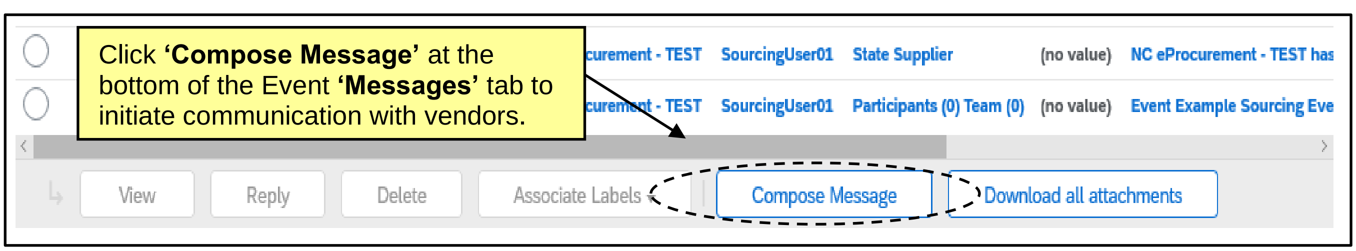


4. Before fully reviewing and evaluating all responses against each other, take the information gathered and **'Post Preliminary Bid Tabulation to IPS'** per the **'Tasks'** tab.

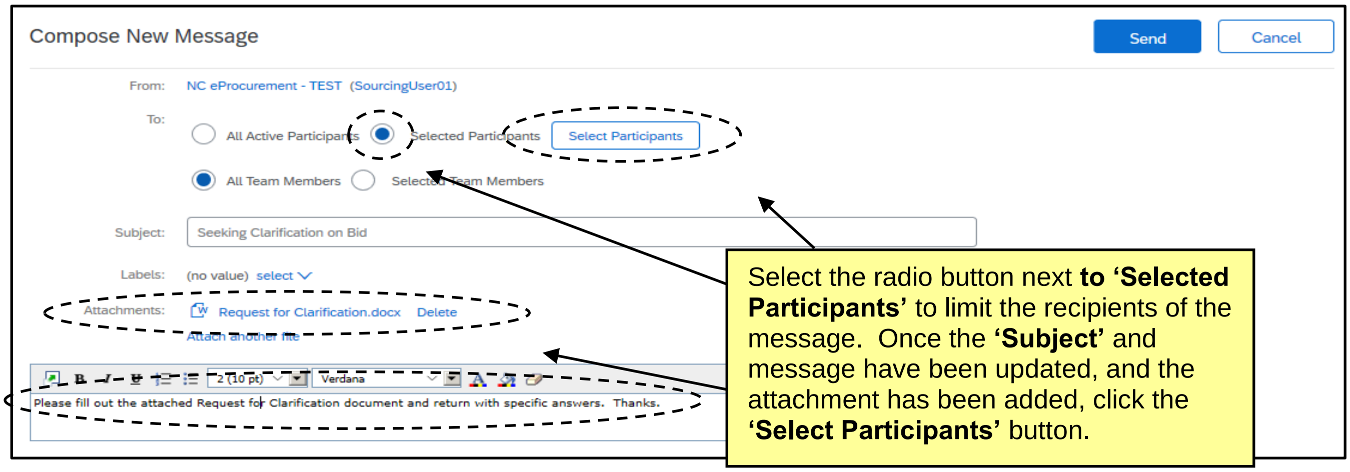
Notes:

- There is an option in the **'Actions'** dropdown menu to **'Download All Supplier Attachments'** where users can mass-select vendors and sections and download everything all at once. It is important to check the box next to **'Title'** under **'Selected Items'** before clicking **'Download Attachments'** on this page.
- The **'Report'** tab on the Event has a button called **'Download Reports.'** Selecting **'Question and Terms Report'** may help in providing all vendor response information in Excel format. If users included **'Line Items'** in the Event **'Content,'** the **'Bid Comparison Report'** option provides a helpful Excel export of that information.
- A **'Preliminary Bid Tabulation Template'** can be found in the **'Sourcing Project Documents'** folder on the **'Documents'** tab should the user desire such guidance, but it is not required to use this form.

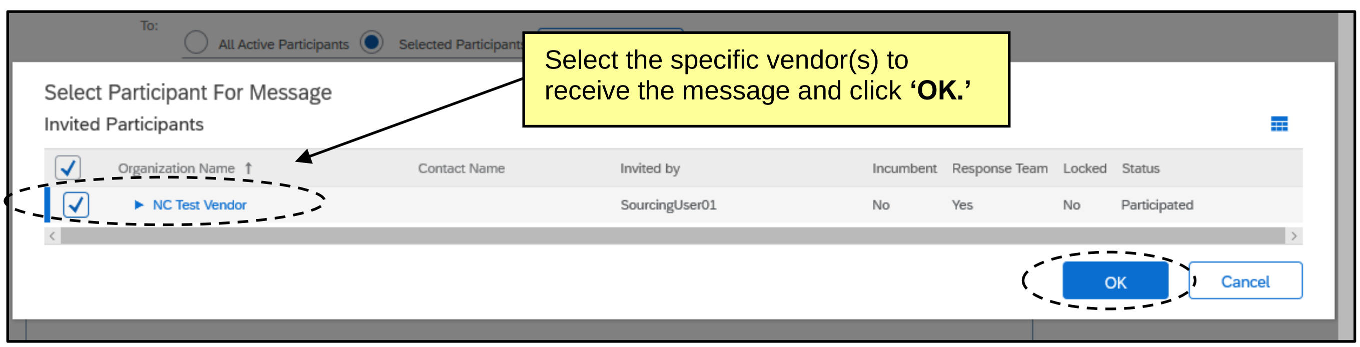
5. While reviewing the vendor responses, it may be necessary to seek clarification with certain vendors or request a BAFO. This communication will be made through the Event message board. Navigate to the Event **'Messages'** tab and click the **'Compose Message'** button at the bottom of the screen.



6. On the **'Compose New Message'** page, select the recipients of the message. Unlike adding an **'Addendum'** where the audience is everyone, in a situation where the user is seeking clarification or a BAFO, the message will likely be directed to a smaller group of participants, if not just one. Click the radio button next to **'Selected Participants,'** enter a more specific **'Subject,'** and write an informative message in the body. Attach a **'Request for Clarification'** form (the template for which can be found in the **'Sourcing Project Documents'** folder on the **'Documents'** tab of the Project). Then click **'Select Participants'** to narrow down the recipient group.



7. The **'Select Participant For Message'** popup will display, and the user can select to which vendor(s) the message should be sent; next, the user can click **'OK,'** and then click **'Send'** back on the **'Compose New Message'** page. The new message will display on the **'Messages'** tab, and the user will wait for a response from the selected vendor before making any more decisions.

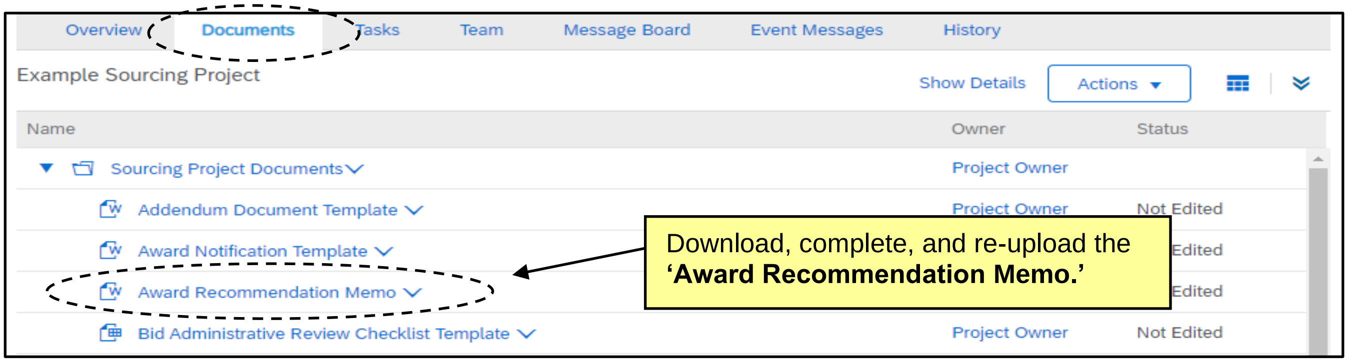


8. If the user needs to request a BAFO from a specific vendor, the request will begin with a targeted message as demonstrated above, but the user should attach a **'Request for BAFO'** form instead of a **'Request for Clarification'** form.

XI. Awarding the Solicitation

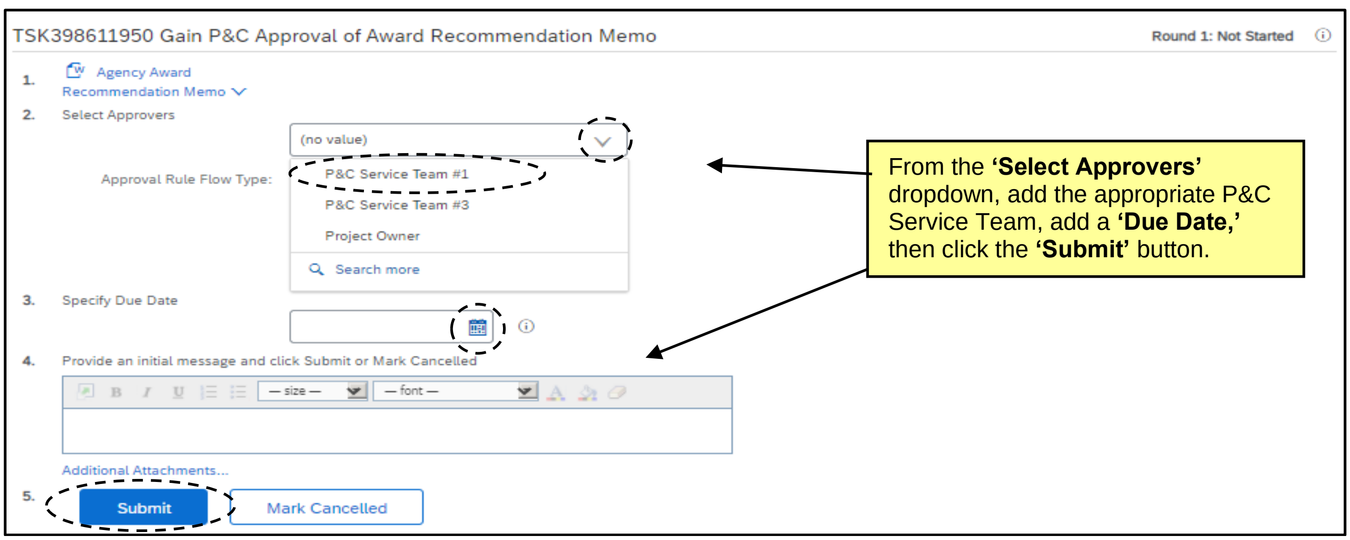
After all information has been received and considered, the user can develop an **'Award Recommendation Memo'** and post the final Bid Tabulation and Award Notification on IPS. If the solicitation was previously approved by P&C, the **'Award Recommendation Memo'** will also need to gain P&C approval 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. Once all the information has been gathered from the Event and all input has been considered, the user can go to the **'Documents'** tab on the Project and download the **'Award Recommendation Memo'** from the **'Sourcing Project Documents**' folder. It should be completed with information about the recommended winning bid, and the template should be replaced with the completed version.



2. Navigate to the **'Tasks'** tab and click on the **'Gain P&C Approval of Award Recommendation Memo'** task in **Phase 06** and select **'View Task Details'** from the drop down.

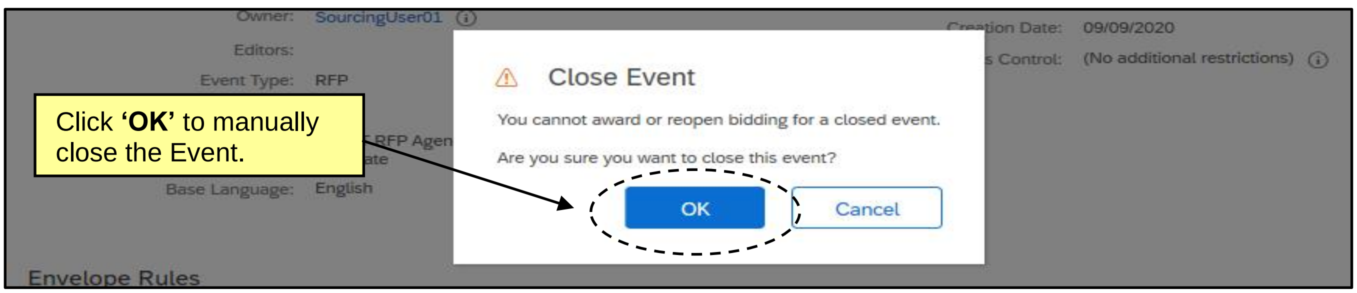
3. On the subsequent **'Approval Task'** page, select the appropriate P&C Service Team from the drop down in the **'Select Approvers'** section. Users should not have to search for it after having recently added it in the previous approval task. Add a **'Due Date'** from the date picker, include a short note to P&C if desired, then click **'Submit'** to send the approval request to P&C.



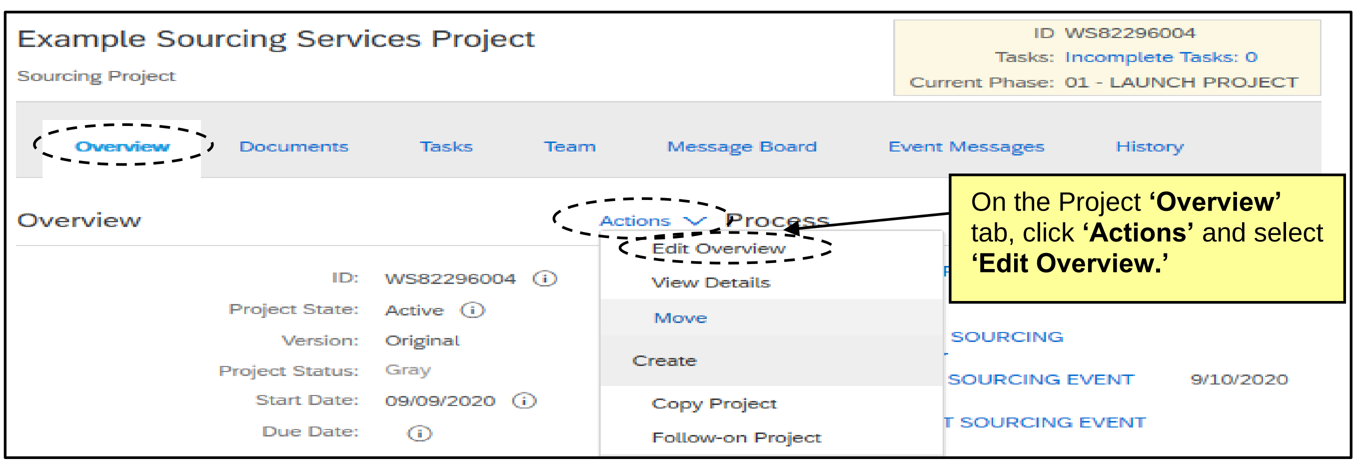
4. After P&C reviews and approves the **'Award Recommendation Memo,'** the task will automatically update to **'Approved'** status and a checkmark will appear to the left. The user can now proceed through the remaining steps to officially award the solicitation.

5. Once the solicitation has been officially awarded and notification has been posted to IPS, return to the Event to close it. Even though an award has been issued, the status will still read **'Pending Selection'** because the award was determined outside of the Event. To manually close the Event, click the **'Actions'** button in the top right and select **'Close Event.'**

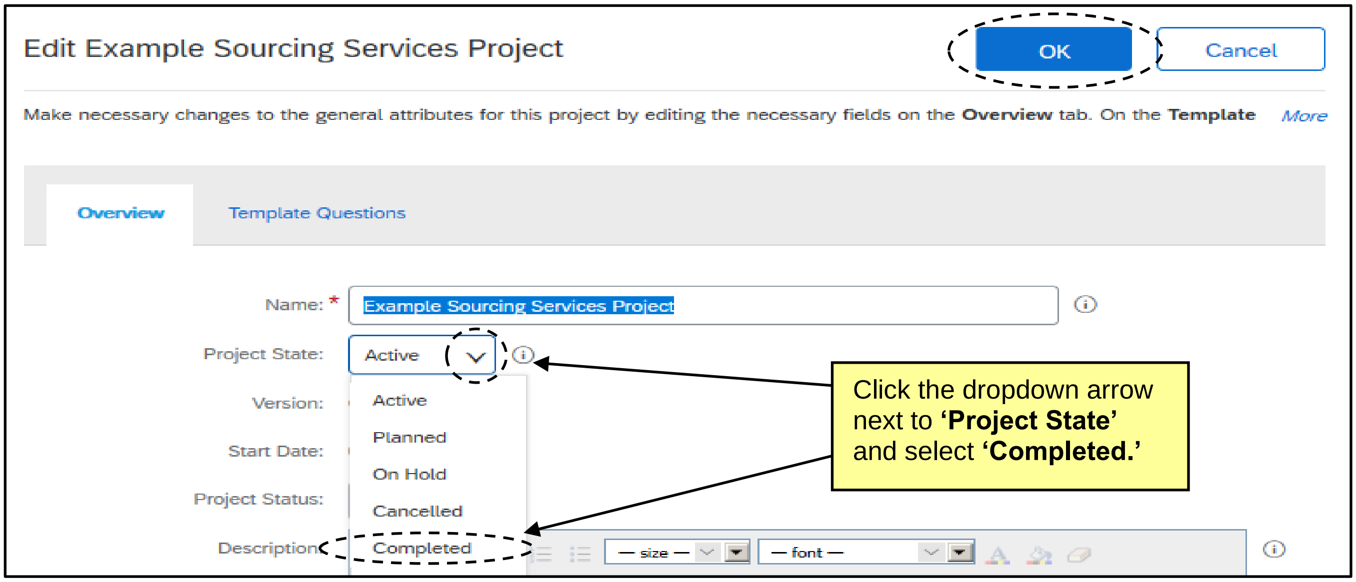
6. The **'Close Event'** warning will display reminding the user that **'Closed'** Events cannot be reopened, which is okay because they can still be accessed for important historical information. Click **'OK.'**



7. The Event status will update to **'Completed.'** Now navigate back to the **'Overview'** tab of the Project to mark that as **'Completed,'** too. Click **'Actions'** at the top of the **'Overview'** tab and select **'Edit Overview'** from the dropdown menu.



8. On the next page, click the dropdown next to **'Project State'** and select **'Completed,'** then click **'OK.'**



9. The Status of both Project and Event will now reflect **'Completed'** and will display as such in the **'My Documents'** portal on the **'Sourcing'** tab. The next step, as indicated by the final task on the **'Tasks'** tab, will be to **'Create Contract Workspace for each Awarded Vendor'** from the completed Sourcing Project. For more information on this process, please see the **'Creating a Contract Workspace from a Sourcing Project'** job aid.