IT Guided Sourcing Project Quick Guide

Introduction

This IT Quick Guide is intended to help State Agencies use the NC eProcurement Sourcing Tool to create a Sourcing Project for IT goods or services, submit applicable documents to the NC Department of Information Technology (NCDIT) for review and approval, publish and conduct a Sourcing Event, and determine the awarded vendor.

A Guided Sourcing Project (SP) is a container for all information and documents pertaining to a formal solicitation for goods or services. During the creation of a SP, the Sourcing Project Owner (e.g., Agency Procurement) will select if the SP is for Non-IT or IT items. This Quick Guide is for SPs that are for IT goods or services. A Sourcing Event is a very important part of an SP and is the electronic forum for vendors to respond to the solicitation with their bids or proposals.

To access the NC eProcurement Sourcing Tool, please go to this **link**. For a more detailed explanation of the end-to-end IT Procurement Process, please review the Playbook / Training Guide at this **link**. If you have any questions or issues accessing or using the NC eProcurement system, please contact the NCEP Help Desk at 888-211-7440, option 3 or send email to **ephelpdesk@its.nc.gov**

Learning **Objectives**

At the end of this job aid, **you will be able to**:

Create a Guided Sourcing Project.

Publish a Sourcing Event.

Interact with NCDIT to gain approval to conduct the Sourcing Event and award a winning bidder.

IT Guided Sourcing Project Quick Guide

Initiate Sourcing Project and Complete the Create guided sourcing project page

1 In the **Common Actions** portlet on the left side of the screen, click the **Guided Sourcing Project** link.

2 The **Create guided sourcing project** page will display. Populate all relevant fields, including the required fields, as noted by a red asterisk (*). Indicate this is a Sourcing Project for IT items in the **Solicitation Vehicle** dropdown by selecting the applicable IT solicitation type (e.g., **IT: RFP**, **IT: IFB**, **IT: RFQ**, **IT: SOW**, **IT: RFI**, or **IT: Exception Request Only**).

3 In the **Template** section, select **NCDIT Sourcing Template – Guided Sourcing** and answer the questions presented, then click **Create**.


📢 This Quick Guide follows the process when the answer to both of these questions is **No** and the solicitation is above the agency's delegation amount. For IT solicitations under agency delegation, only **Phases 03, 05, 06, 08,** and **10** will display, and there are no required interactions with NCDIT.
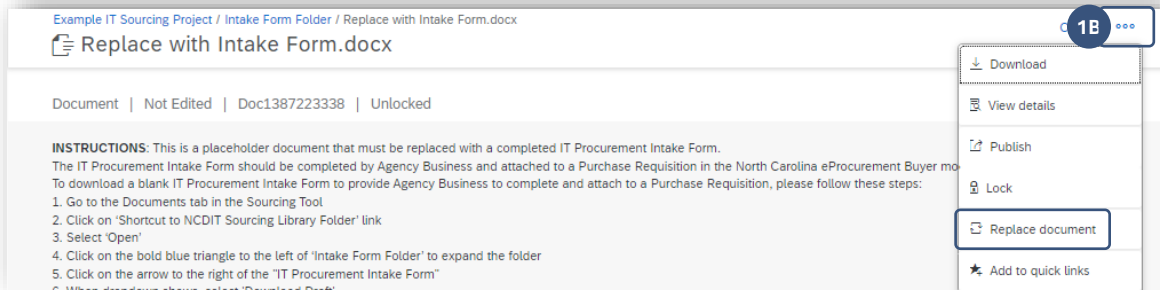
IT Guided Sourcing Project Quick Guide

Submit IT Procurement Intake Form to NCDIT Reviewers for Approval

1 The **IT Procurement Intake Form** contains summary information about an IT business need. This information will help Agency Procurement and NCDIT collaboratively determine the appropriate sourcing approach to address the IT business need. Sourcing Project Owners will submit the completed **IT Procurement Intake Form** to NCDIT for approval in the first task of **Phase 01**. A blank **IT Procurement Intake Form** template can be downloaded from the **Sourcing Library**.

   A. When the **IT Procurement Intake Form** has been competed, navigate to the **Events and other documents** section, click the blue arrow to the left of the **Intake Form Folder**, and click on the **Replace with Intake Form** document to open it up.
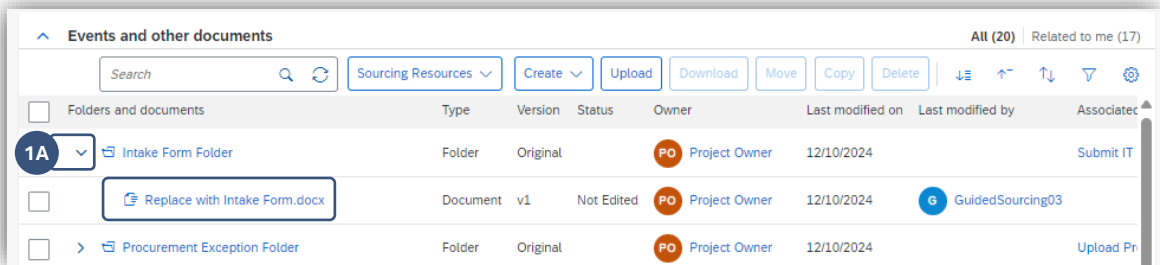

   B. Click the three dots in the top right and select **Replace document** from the dropdown. Select the **Upload a new document** option, choose the completed version of the form, then select **Yes** and click **Replace**. The document's status will update from **Not Edited** to **Draft** when replaced.

📢 The **Sourcing Library** can be found by clicking **Manage** in the top right of the Ariba home page

   C. In the **Tasks** section, click the blue arrow next to **Phase 01** and click on the **Submit IT Procurement Intake Form to NCDIT Reviewers for Approval** task. Click **Submit** in the top right of the task to send the task to NCDIT for approval. The approval flow and **Due Date** will be pre-populated.
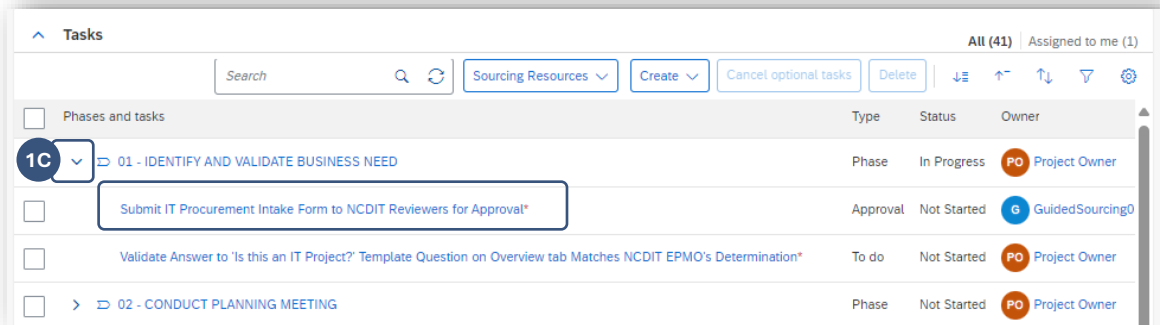
📢 If the **Due Date** needs to be altered, click into the task and click the **Edit** button to do so.

D. When the Intake Form task is approved, the status of the subsequent **Validate Answer to Is this an IT Project? Template Question on Overview tab Matches NCDIT EPMOs Determination** task will shift to **In Progress**. If updates are necessary, click into the **Project Summary** section of the Sourcing Project and edit the **Template questions**. To close the task, click into it and click **Set to Complete**.

Populate Solicitation Document and Initiate Sourcing Event

1 Once all applicable tasks are complete in **Phase 02**, proceed to **Phase 03** to prepare the solicitation documents and Event for subsequent NCDIT review.

A. In the **IT** section of the **Sourcing Library**, click the blue triangle next to the **RFx Solicitation Document Templates** folder and click on the template document that matches the type of solicitation being posted. Download and populate the template, then save a local copy.

B. Back in the **Events and other documents** section, click the blue triangle to the left of the **Solicitation Document and Sourcing Event Folder**, then click into the **Replace with Draft IT Solicitation Document.docx** document. Click the three dots in the top right and select **Replace document** from the dropdown to add the completed version of the Solicitation Document and upload any other documents that NCDIT may need to review.

> The **Doc ID#** of the Sourcing Event, which will become the **Solicitation Number** in eVP and is commonly added to the Solicitation Document, is visible in the **Document Id** column.

C. In the same folder, click on the **IT Sourcing Event Template** to initiate the Sourcing Event. The **Create guided sourcing project** page will display. Populate the **Name** and **Description** fields with pertinent information then click **Create**.

D. After the Sourcing Event displays, click the **Edit** button in the **Event duration** section to set the Due date and time. Click on **Time** and set the Due date using the calendar and clock dropdowns, then click **Save**.

IT Guided Sourcing Project Quick Guide

E. Scroll to the **Questions, requirements, and attachments** section and adjust the content as necessary. Add, edit, or delete subsections by checking the box next to a subsection and using the buttons at the top of the section to perform the desired action.

F. When all adjustments have been made, click **Save and close** in the top right to return to the Sourcing Project. In the **Tasks** section, mark the **Upload Draft Solicitation Document and Complete Sourcing Event Duration and Content Sections** task **Complete** in **Phase 03**. At this point, the **Submit Draft Solicitation Document for Agency Approval** task will submit itself, and the Sourcing Project Owner can wait for feedback and approval from their **Agency CIO**.

Gain NCDIT Approval of Solicitation Document and Sourcing Event

1 When both tasks are complete in **Phase 03**, the Sourcing Project Owner can proceed to **Phase 04** to submit the Solicitation Document and Sourcing Event for approval by NCDIT.

A. In the **Tasks** section, click on the **Gain NCDIT Approval of Solicitation Document and Sourcing Event** task. On the subsequent page, the approval flow and **Due date** will be set automatically. The **Due date** will be listed as **Days after parent phase starts** and the countdown of days began once **Phase 03** was completed and **Phase 04** began. Click **Submit** in the top right to send the approval request to NCDIT.

5   12/23/2025

Finalize and Publish the Sourcing Event

1 After receiving approval from NCDIT to post the solicitation, the Sourcing Project Owner should finalize their Solicitation Document, return to the Sourcing Event to update any dates that may have changed during the approval process, then go to the **Questions, requirements, and attachments** (Content) section to attach the final version of the Solicitation Document to subsection 3.1, and make any other necessary updates.

   A. Click on the **Draft** version of the Sourcing Event from the **Project Insights** section.

   B. Verify that the **Due date** in the **Event duration** section has not changed during the solicitation approval process. If it has, update it accordingly via the **Edit** button.

   C. Navigate to the **Questions, requirements, and attachments** section to add the finalized version of the Solicitation Document in subsection **3.1** and make any other necessary adjustments. Click the arrow to the left of Section **3.0** to display the Subsections.

   D. Scroll right to the **Initial Value** column for subsection **3.1** and click on **browse** to replace the **SAMPLE BLANK DOCUMENT** with the completed Solicitation Document. Select a local copy of the completed Solicitation Document and apply the changes.

   E. When all Subsections have been finalized, click **Publish** to send the Sourcing Event to eVP so that vendors can begin to respond, then navigate back to the Sourcing Project **Tasks** section and mark the **Publish Sourcing Event** task **Complete** in **Phase 05**.

Conduct Sourcing Event and Mark Phase 05 and 06 Tasks Complete

1 Once a Sourcing Event is published and open for bidding, vendors have through the allotted time per the Due date to provide electronic responses to the solicitation. During the time that an Event is open, vendors can ask questions, and Project Owners can respond, if needed, by creating addenda or even extend the timing of the Event. **Phase 05** of the **Tasks** section will guide Project Owners through these steps, and there are two more tasks after the Event has closed that are required to be completed in **Phase 05** and **06**. For more detailed information on updating the Event while it's open, please see the **Managing and Awarding a Sourcing Event (IT)** job aid.

   A. When the Sourcing Event is complete, the first required task in **Phase 05** is **Open Vendor Responses to Sourcing Event after Response Submission Deadline**. Mark this task **Complete** after opening the envelopes.

   B. **Phase 06** will automatically start, and the first task is to **Determine Vendor Responsiveness**. Once this has been done, mark that task **Complete**, too. Complete any other optional tasks in **Phase 06** before moving to **Phase 07**.

IT Guided Sourcing Project Quick Guide

Submit Draft Award Recommendation and Leading Vendor Proposal(s) to NCDIT for Review

1 After posting the solicitation and conducting the Sourcing Event, the tasks in **Phases 05 – 07** in conjunction with the "IT Procurement Process Playbook" will outline the steps towards arriving at an **Award Recommendation**. The **Submit Award Recommendation and Leading Vendor Proposal(s) to NCDIT for Review** task at the end of **Phase 07** will give the Agency some initial feedback from NCDIT.

    A. Navigate to **Award Recommendation Folder** in the **Events and other documents** section of the Sourcing Project and upload a completed Award Recommendation document by replacing the **Replace with Award Recommendation** document along with uploading upload any additional documents NCDIT may need to review. The original template for this document can be found in the **Sourcing Library**.

    B. In the **Tasks** section, click on the **Submit Award Recommendation and Leading Vendor Proposal(s) to NCDIT for Review** task and click **Submit** to send the document(s) to NCDIT for approval. The **Due date** and **Approval flow** will be automatically set.

    C. After NCDIT fully approves the request, the task will automatically update to **Approved** status, and the Sourcing Project Owner can move on to **Phase 08** if necessary to handle any vendor negotiations, and if not to **Phase 09** to gain final approval.

Gain NCDIT Approval of Final Award Recommendation

1 Following any final negotiations per **Phase 08**, proceed to **Phase 09** to complete the **Gain Statewide IT Procurement Office and OSBM (if applicable) Approval of Final Award Recommendation** task.

    A. If any information on the **Award Recommendation** document required an update following vendor negotiations, finalize the document and replace the draft version with the final version in the **Award Recommendation Folder** in the **Events and other documents** section.

    B. Navigate to the **Tasks** section and click on the **Gain Statewide IT Procurement Office and OSBM (if applicable) Approval of Final Award Recommendation** task and click **Submit** to send the document to NCDIT for approval. The **Due date** and **Approval flow** will be automatically set.

IT Guided Sourcing Project Quick Guide

Completing the Sourcing Event and Project

1 After NCDIT fully approves the Award Recommendation Approval request, the task will automatically update to **Approved** status, and the Sourcing Project Owner can move on to **Phase 10** to handle the contract and close out the Sourcing Event and Project.

A. First, navigate to the Pending Selection Sourcing Event, click the three dots in the top right, hover over **Event options**, and select **Mark as complete** from the popup.
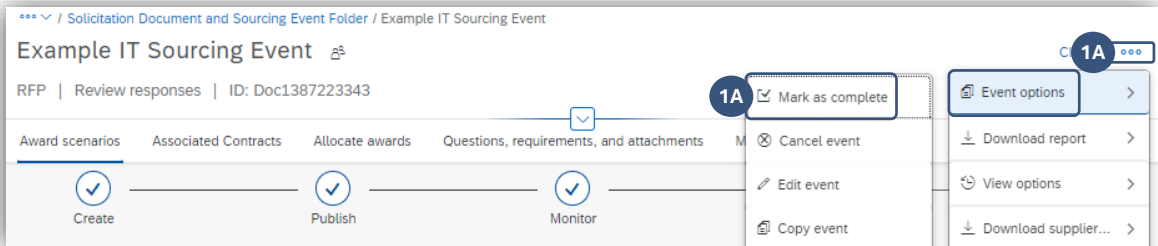

B. Back on the Sourcing Project in **Phase 10**, mark the **Execute Contract** task **Complete** when all details of the signed agreement have been finalized.

C. Click the three dots in the top right of the Sourcing Project and select **Create follow-on project** from the dropdown. Select **Contract workspace** on the subsequent page and create a Contract Workspace so that the CW# can be used when creating an Award in eVP.
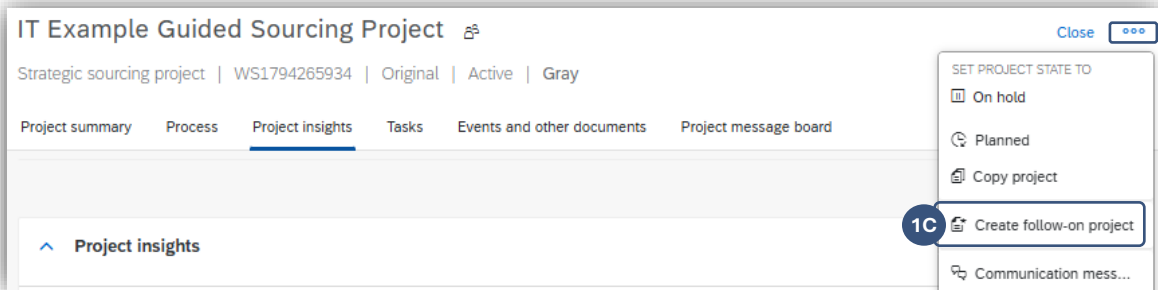
D. In **Phase 10** of the **Tasks** section, mark the task for **Create Contract Workspace for each Awarded Vendor** as **Complete**.
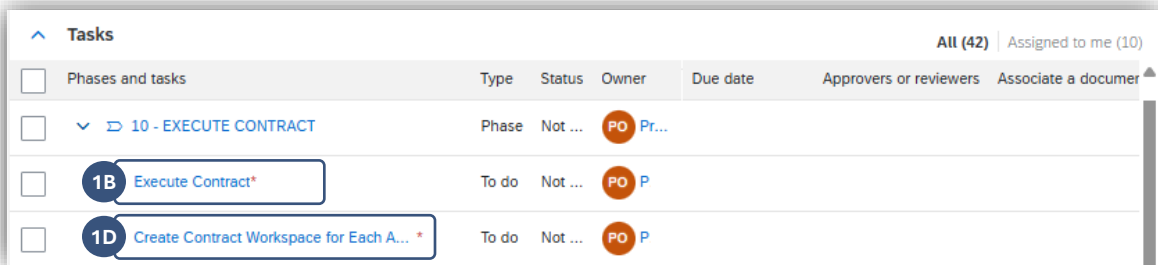
E. Now that all required tasks have been marked complete, click the three dots in the top right of the Sourcing Project and select **SET PROJECT STATE TO Completed** in the dropdown to finalize this Sourcing Project.