Introduction

Vendor responses to Sourcing Events are concealed from Project Owners until envelopes are opened after the **Due date** has expired. By default, all aspects of a vendor's response are put into one envelope. If a "Two-Step" solicitation is necessary, Project Owners can choose to conduct Multi-Envelope events where certain aspects of a vendor's response are only accessible after reviewing the contents of an initial envelope. This guide will cover the creation of Multi-Envelope events and how those envelopes can be opened.



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Learning Objectives

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



Understand how to designate a Sourcing Event will follow a "two-step" process and how to assign different sections in the Event to different envelopes.



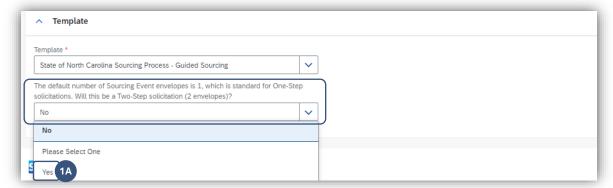
Understand how to gain approval to open the second envelope of a Sourcing Event if necessary.



Understand how open the second envelope.

Template Questions

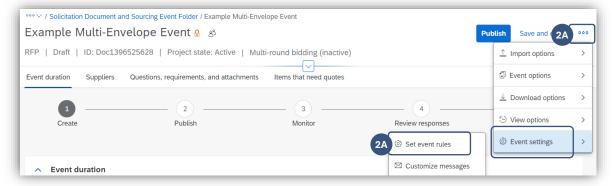
- After filling out the **Project details** on the **Create guided souring project** page, the user should navigate down the screen to the **Template** section. Whether the solicitation is IT or Non-IT, users will be required to answer a series of questions, and the final question will always be related to Multi-Envelope events (unless it's for a **Non-IT: RFI**).
 - A. In the **Template** section of the **Create guided souring project** page, users will be prompted to answer a series of questions. The final question, which defaults to **No**, is always "The default number of Sourcing Event envelopes is 1, which is standard for One-Step solicitations. Will this be a Two-Step solicitation (2 envelopes)?". From the dropdown, change this answer to **Yes** to conduct a "Two-Step" solicitation.



B. When all fields have been completed and all template questions have been answered, click the Create button in the top right of the screen. If any required fields are missing, or there are any other issues, the system will alert the user to the missing or incorrect information by highlighting those fields with a red border, accompanied by an informative error message.

Setting the Number of Envelopes

- The number of envelopes in a Sourcing Event defaults to 1 even if the last **Template** question answered is **Yes**. Users need to access the **Event rules** to manually update this.
 - **A.** If more than one envelope is required for the Event, click the three dots in the top right, hover over **Event settings**, and select **Set event rules** from the popup.



B. In the **Envelope rules** section of the subsequent **Set event rules** page, click the down arrow in the **Number of Envelopes** field and change the number of envelopes to **2** in the dropdown menu, then click **Save**.

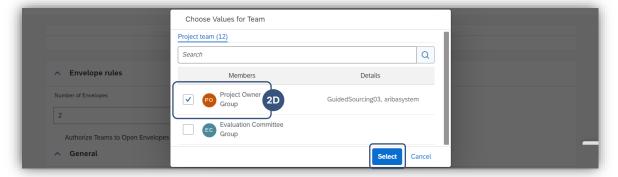


C. After setting the Number of Envelopes field to 2, an additional field in the Authorize

Teams to Open Envelopes section will appear asking the user to select who is
authorized to open the additional envelope. Click the pop-out icon in the Select teams
box next to envelope 2.

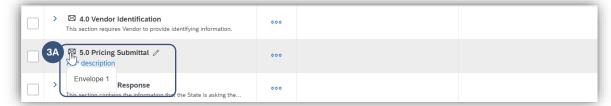


D. On the subsequent Choose Values for Team popup, check the box next to the Project Owner Group to match the permissions to the first envelope and click Select. Then click Save at the top of the Set event rules page.



Updating the Sourcing Event Content to Match Envelope Settings

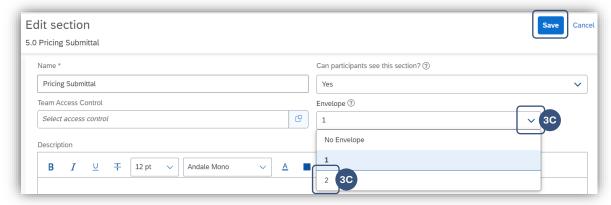
- Each section of the Sourcing Event's **Questions**, **requirements**, **and attachments** (Content) section where vendors are expected to respond for Non-IT solicitations, Section **4.0 Vendor Information**, Section **5.0 Pricing Submittal**, and Section **6.0 Vendor Response**; and for IT solicitations, Section **4.0 Vendor Information** and Section **5.0 Vendor Response** are tied to Envelope 1 by default. When additional envelopes are added to an Event, the Project Owner needs to update whichever sections need to be tied to the additional envelope.
 - **A.** In the **Questions, requirements, and attachments** (Content) section of the Sourcing Event, note the envelope icon next to the section number and hover the cursor over it to display in which envelope that sections answers will be revealed.



B. To change the envelope in which a section's answers will be concealed, check the box to the left of the section, click the three dots to its right, and select the **Edit section** from the popup.

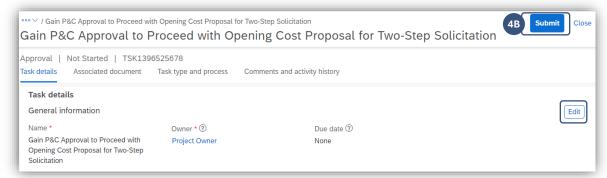


C. On the subsequent Edit Section page, click the down arrow in the Envelope field and select 2 from the dropdown to apply a new envelope number for that section, then click Save. Complete all remaining Event sections and Publish and conduct the Sourcing Event as normal.



Gain Approval to Open the Second Envelope

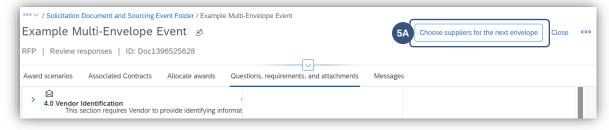
- When the event status becomes **Pending Selection**, Project Owners can open the first envelope to evaluate the preliminary portion of vendor responses. Before they can open the second envelope, they'll have to get approval from P&C or SITP through the **Gain XXX Approval to Proceed with Opening Cost Proposal for Two-Step Solicitation** task.
 - A. After the first envelope has been opened and response data has been gathered, navigate to Phase 05 for Non-IT or Phase 06 for IT in the Tasks section and go to the Gain XXX Approval to Proceed with Opening Cost Proposal for Two-Step Solicitation task.
 - B. For the Non-IT task, click the Edit button to set a Due date, then click Submit. The Due date will be pre-populated in the IT task and the Approval flow will be pre-populated for both.



C. After P&C or SITP reviews and approves the first round of responses, the task will automatically update to **Approved**. The user can now proceed onto determining which vendors will advance to the second step in the review process.

Opening the Second Envelope

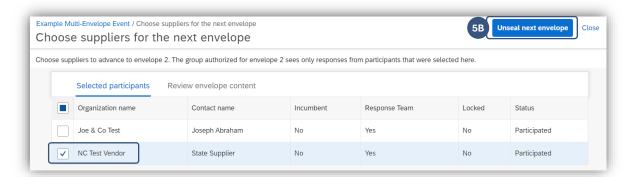
- Once approval has been granted to proceed with opening the cost proposal, users can decide which vendors will progress to the next round and open the remaining envelopes.
 - **A.** After receiving P&C or SITP approval to proceed to the second envelope, return to the Sourcing Event and click the **Choose suppliers for the next envelope** button.



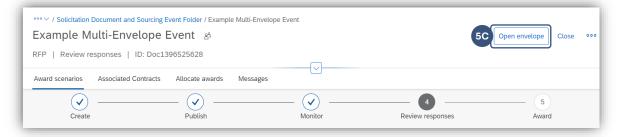
B. The Choose suppliers for next envelope page will display, and users can select for which vendors they'd like to see the next envelopes information. It can be for all vendors, or they can choose to exclude certain vendors if the information they saw in Envelope 1 excluded them from moving on in the process. Check the boxes next to the vendor(s) of interest and click the Unseal next envelope button. If not all vendors are selected, a warning message will display advising the user to consider their checkmarks carefully. To proceed in this event, click the Unseal anyway button.



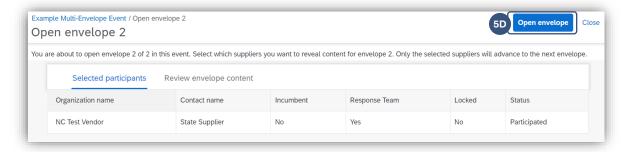
If the Project Owner excludes certain vendors from the second round of consideration – either intentionally or inadvertently – the entirely of their bid submission will become permanently unavailable and they will appear as "rejected" in the **Event Log**. Proceed with caution when selecting the vendors to move forward to the second round of the process.



C. Back on the Event, click the Open envelope button.



D. Then click the Open envelope button again on the Open envelope 2 confirmation page.



E. In the Questions, requirements, and attachments (Content) section, Envelope 2 in Section 5.0 Pricing Submittal (for this example) is now open. On the right side, the user will now see the response documents the vendors uploaded that were previously concealed. Click on the attachment to download. "Envelope rejected" will display below any vendors not selected to advance to the second round.

