

Multi-Envelope Events

Introduction

Vendor responses to Sourcing Events are concealed from Sourcing Agents 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, Sourcing Agents 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.



Learning Objectives

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

STATE DEPARTMENT STATE BRANCH
LOCAL GOVERNMENT CITY COUNTY
COMMUNITY COLLEGE PUBLIC SCHOOLS
NORTH CAROLINA ePROCUREMENT PURCHASING
ONLINE SHOPPING STATEWIDE TERM CONTRACTS
ELECTRONIC VENDOR PORTAL HUB CERTIFIED VENDOR
QUOTE PUNCHOUT CATALOG
PURCHASE ORDER
SOURCING
BIDDING
BUY



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.



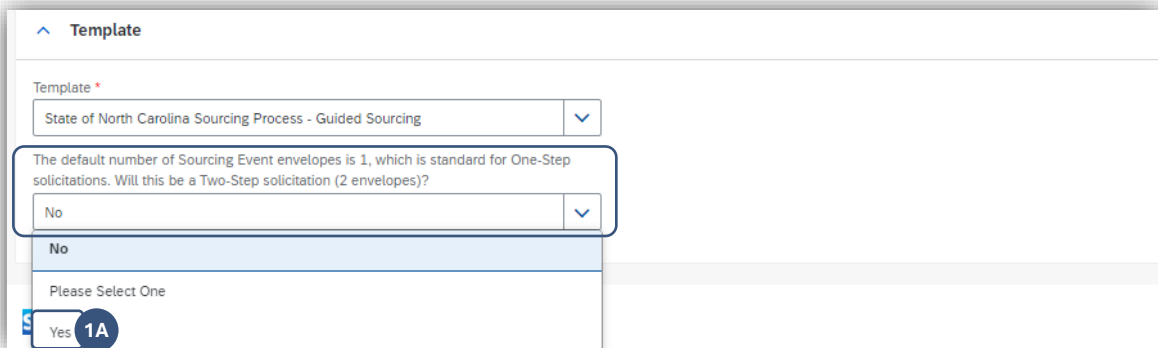
Understand how open the second envelope.

Multi-Envelope Events

Template Questions

1 After filling out the **Project details** on the **Create guided sourcing 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 sourcing 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.

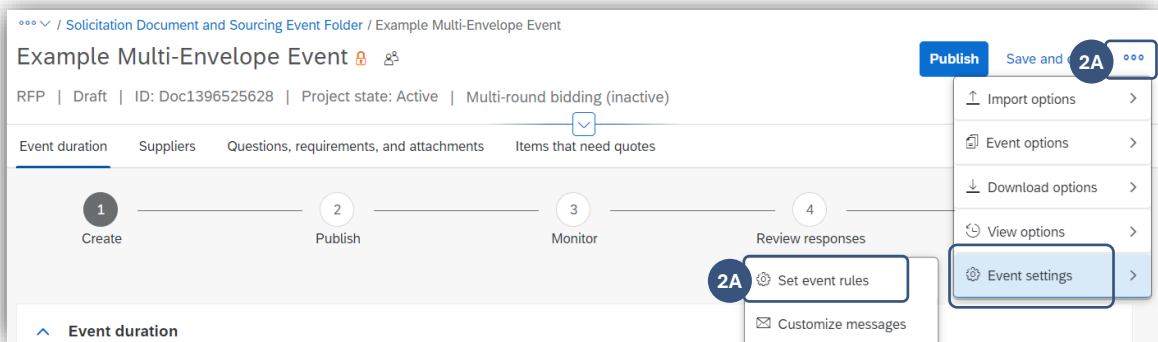


B. When all fields have been completed and all template questions have been answered, click the **Create** button in the top right of the screen. If any required fields are missing, or there are any other issues, the system will alert the user to the missing or incorrect information by highlighting those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

Setting the Number of Envelopes

2 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.



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- 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**.

Set event rules

Envelope rules

Number of Envelopes

1

No Envelope

1

2 2B

Save Cancel

- 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**.

Envelope rules

Number of Envelopes

2

Authorize Teams to Open Envelopes

Envelope ID	Team
1	Project Ow... x
2	Select teams

2C

- 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.

Choose Values for Team

Project team (12)

Search

Members	Details
<input checked="" type="checkbox"/> PO Project Owner Group	GuidedSourcing03, aribasystem
<input type="checkbox"/> EC Evaluation Committee Group	

2D

Select Cancel

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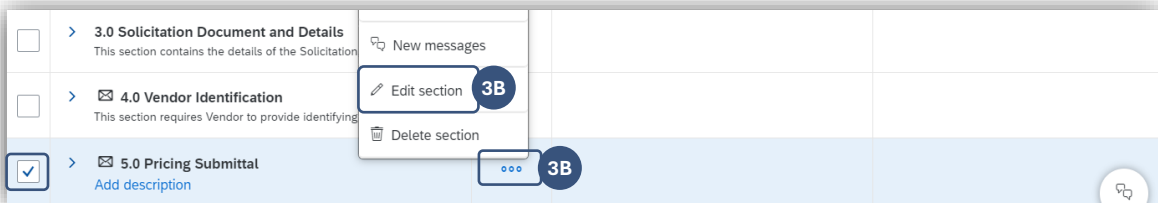
Updating the Sourcing Event Content to Match Envelope Settings

3 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 Sourcing Agent 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.

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Gain P&C Approval to Open the Second Envelope

- 4 When the event status becomes **Pending Selection**, Sourcing Agents 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.

The screenshot shows a task details page for 'Gain P&C Approval to Proceed with Opening Cost Proposal for Two-Step Solicitation'. The page has a breadcrumb trail: 'Gain P&C Approval to Proceed with Opening Cost Proposal for Two-Step Solicitation'. There are buttons for '4B Submit' and 'Close'. Below the breadcrumb, there are tabs: 'Approval', 'Not Started', and 'TSK1396525678'. Under the 'Approval' tab, there are sub-tabs: 'Task details', 'Associated document', 'Task type and process', and 'Comments and activity history'. The 'Task details' tab is active, showing 'General information'. It includes fields for 'Name' (Gain P&C Approval to Proceed with Opening Cost Proposal for Two-Step Solicitation), 'Owner' (Project Owner), and 'Due date' (None). There is an 'Edit' button in the top right corner of the task details section.

- 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

- 5 Once P&C has approved that the user can 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.

The screenshot shows a page titled 'Example Multi-Envelope Event'. The breadcrumb trail is 'Solicitation Document and Sourcing Event Folder / Example Multi-Envelope Event'. There are buttons for '5A Choose suppliers for the next envelope' and 'Close'. Below the breadcrumb, there are tabs: 'RFP', 'Review responses', and 'ID: Doc1396525628'. Under the 'Review responses' tab, there are sub-tabs: 'Award scenarios', 'Associated Contracts', 'Allocate awards', 'Questions, requirements, and attachments', and 'Messages'. The 'Questions, requirements, and attachments' tab is active, showing a section titled '4.0 Vendor Identification' with a description: 'This section requires Vendor to provide identifying informat'. There is a dropdown arrow above the sub-tabs.

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- 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 Sourcing Agent excludes certain vendors from the second round of consideration – either intentionally or inadvertently – the entirety 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.

Example Multi-Envelope Event / Choose suppliers for the next envelope

Choose suppliers for the next envelope

Choose suppliers to advance to envelope 2. The group authorized for envelope 2 sees only responses from participants that were selected here.

Selected participants Review envelope content

<input type="checkbox"/>	Organization name	Contact name	Incumbent	Response Team	Locked	Status
<input type="checkbox"/>	Joe & Co Test	Joseph Abraham	No	Yes	No	Participated
<input checked="" type="checkbox"/>	NC Test Vendor	State Supplier	No	Yes	No	Participated

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

*** / Solicitation Document and Sourcing Event Folder / Example Multi-Envelope Event

Example Multi-Envelope Event

RFP | Review responses | ID: Doc1396525628

Award scenarios Associated Contracts Allocate awards Messages

Create Publish Monitor Review responses Award

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

Example Multi-Envelope Event / Open envelope 2

Open envelope 2

You are about to open envelope 2 of 2 in this event. Select which suppliers you want to reveal content for envelope 2. Only the selected suppliers will advance to the next envelope.

Selected participants Review envelope content

Organization name	Contact name	Incumbent	Response Team	Locked	Status
NC Test Vendor	State Supplier	No	Yes	No	Participated

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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.

