NC eProcurement
Multi-Envelope Events

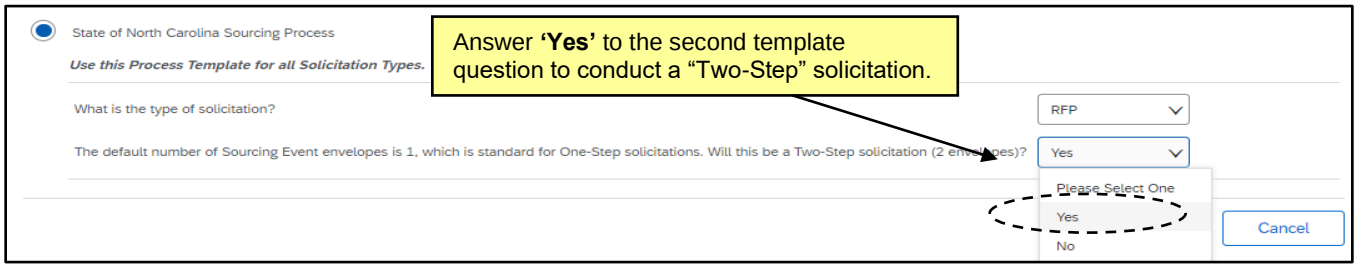
Vendor responses to Sourcing Events are concealed from Sourcing Agents until envelopes are opened after the Due Date has expired. By default, all aspects of a vendor's response are put into one envelope. If a "Two-Step" solicitation is necessary, Sourcing Agents can choose to conduct Multi-Envelope events 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.

I. Template Questions

After filling out the Sourcing Project Attributes fields on the **'Create Souring Project'** page, the user should navigate down the screen to the **'Select a template'** section. Whether the user selects the IT or Non-IT template, they will be required to answer two questions. The second question relates to Multi-Envelope events.

1. In the **'Select a template'** section of the **'Create Sourcing Project'** page, note the radio button next to either the **'State of North Carolina Sourcing Process'** template or the **'NCDIT Sourcing Template.'** Users will be prompted to answer two questions:

2. Answer **'Yes'** to the second question: **"The default number of Sourcing Envelopes is 1, which is standard for One-Step solicitations. Will this be a Two-Step solicitation (2 envelopes)?"**

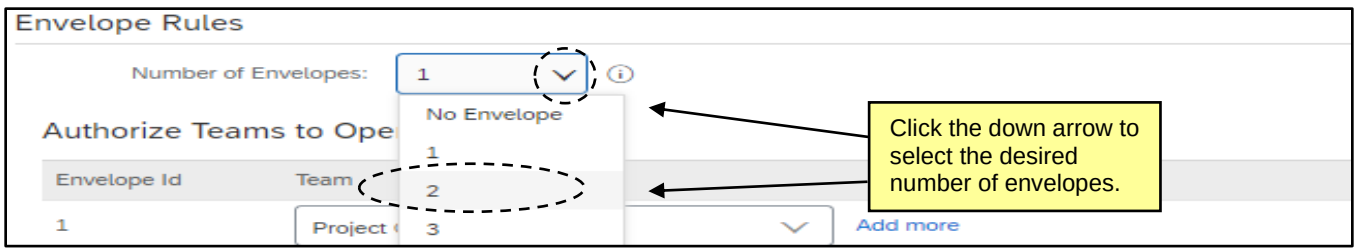


3. When all fields have been completed and both template questions have been answered, click the **'Create'** button in the top or bottom right of the screen. If any required fields are missing, or there are any other issues, the system will alert the user to the missing or incorrect information by highlighting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

II. Setting the Number of Envelopes

When initiating a Sourcing Event, the first of the four sections to edit is the Event **'Rules.'** The first field that can be edited is **'Number of Envelopes'** which defaults to "1."

1. If more than one envelope is required for the Event, click the down arrow in the **'Number of Envelopes'** field and select the desired number of envelopes from the dropdown menu.

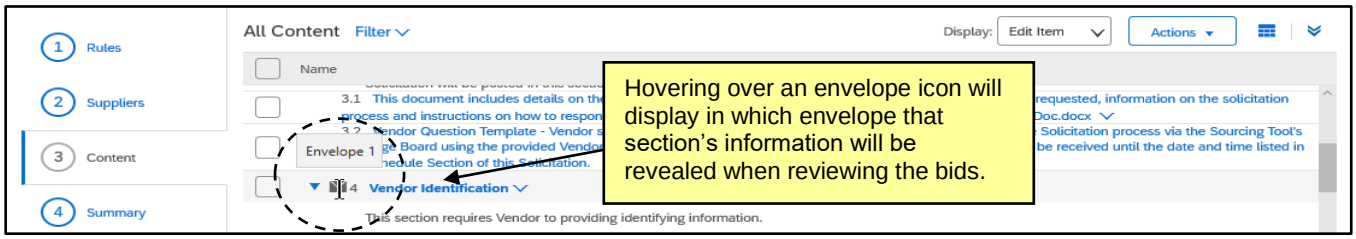


2. After setting the **'Number of Envelopes'** field to something other than "1," an additional field in the **'Authorize Teams to Open Envelopes'** section will appear asking the user to select who is authorized to open the additional envelope(s). Click the down arrow and select **'Search more'** from the dropdown to select the appropriate team member. It likely makes sense to match the selection with that of the first envelope, which is the **'Project Owner'** in most cases.

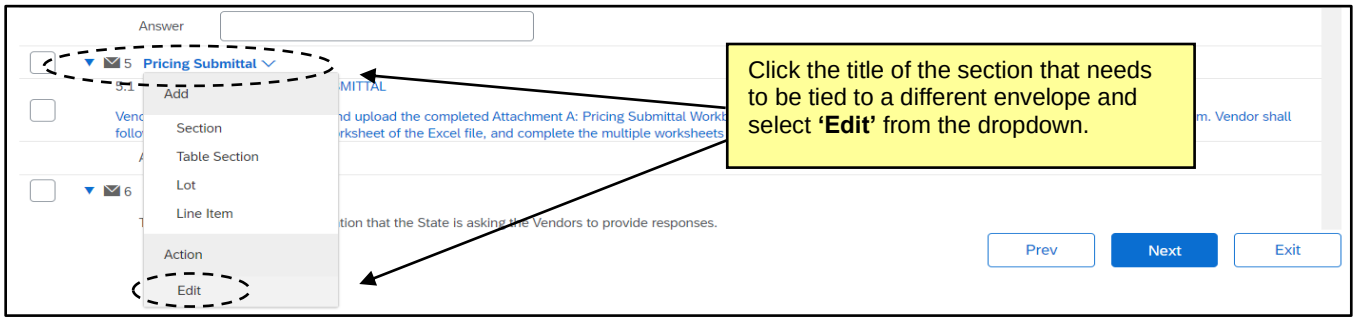
III. Updating the Sourcing Event Content to Match Envelope Settings

Each section of the Sourcing Event's **'Content'** where vendors are expected to respond – for Non-IT solicitations, Section 4 (Vendor Information), Section 5 (Pricing Submittal), and Section 6 (Vendor Response); and for IT solicitations, Section 4 (Vendor Information) and Section 5 (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.

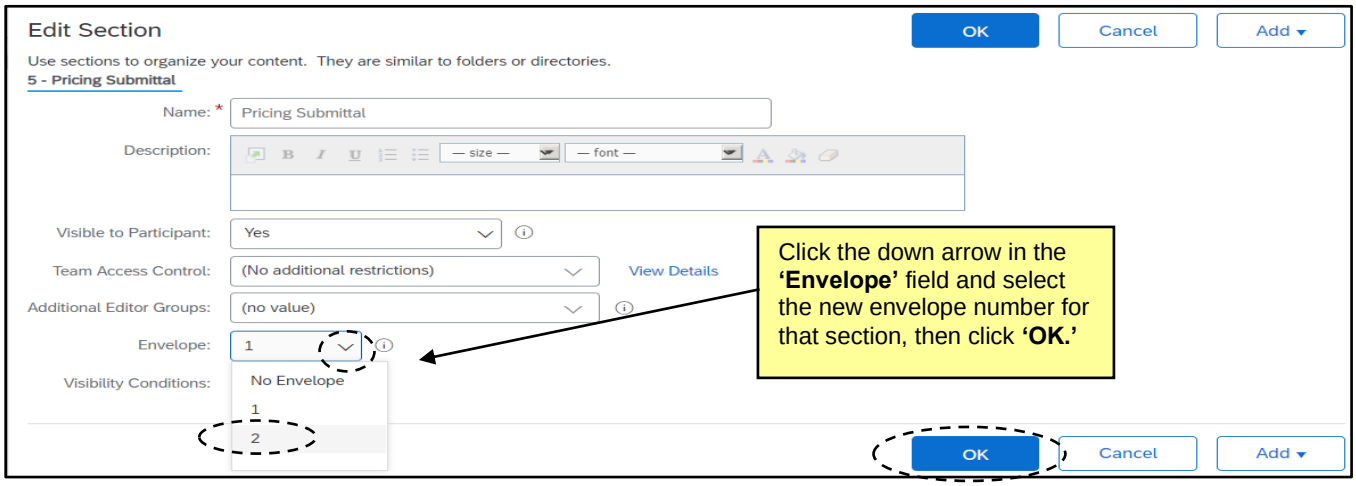
1. Note the envelope icon next to the section number and hover the cursor over it to display in which envelope that section's answers will be revealed.



2. To change the envelope in which a section's answers will be concealed, click the title of the section and select **'Edit'** from the dropdown.



3. On the subsequent **'Edit Section'** page, click the down arrow in the **'Envelope'** field and select the new envelope number for that section from the dropdown. Click **'OK.'**

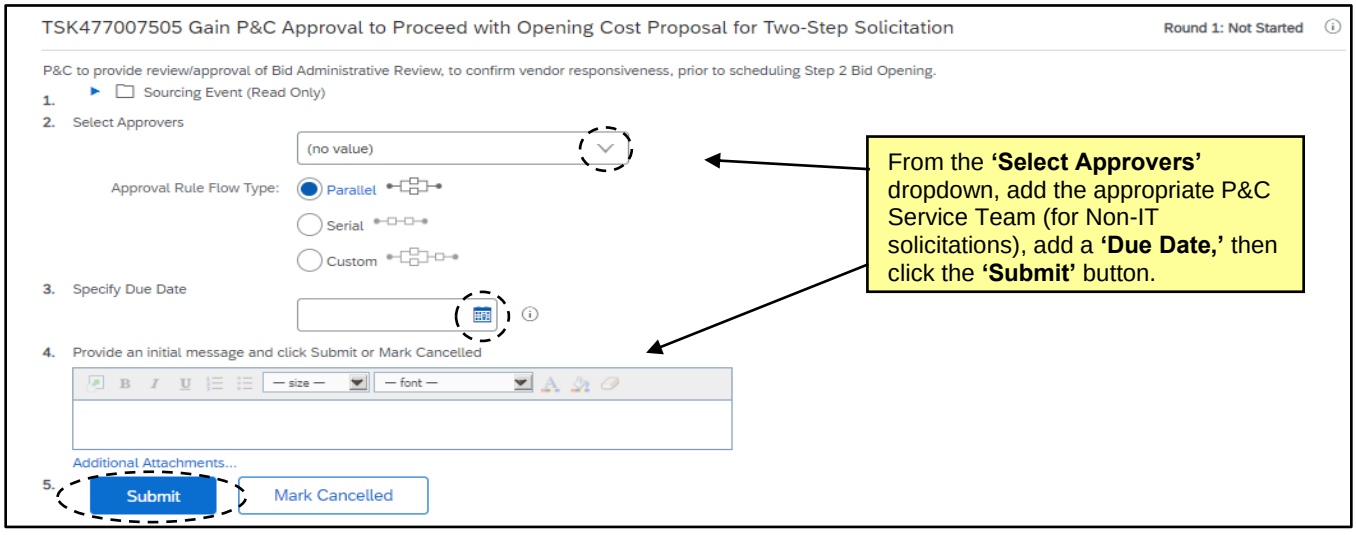


IV. Gain P&C Approval to Open the Second Envelope

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 (if the solicitation is Non-IT) through the **'Gain P&C Approval to Proceed with Opening Cost Proposal for Two-Step Solicitation'** task. No approval is necessary for IT solicitations.

1. 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 on the **'Tasks'** tab and go to the **'Gain P&C Approval to Proceed with Opening Cost Proposal for Two-Step Solicitation'** task. Click on the task and select **'View Task Details'** from the dropdown.

2. On the subsequent **'Approval Task'** page, select the appropriate P&C Service Team from the drop down in the **'Select Approvers'** section for Non-IT solicitations. For IT solicitations, SITP will automatically be added as the approver. Add a **'Due Date'** from the date picker, include a short note to if desired, then click **'Submit'** to send the approval request to P&C.

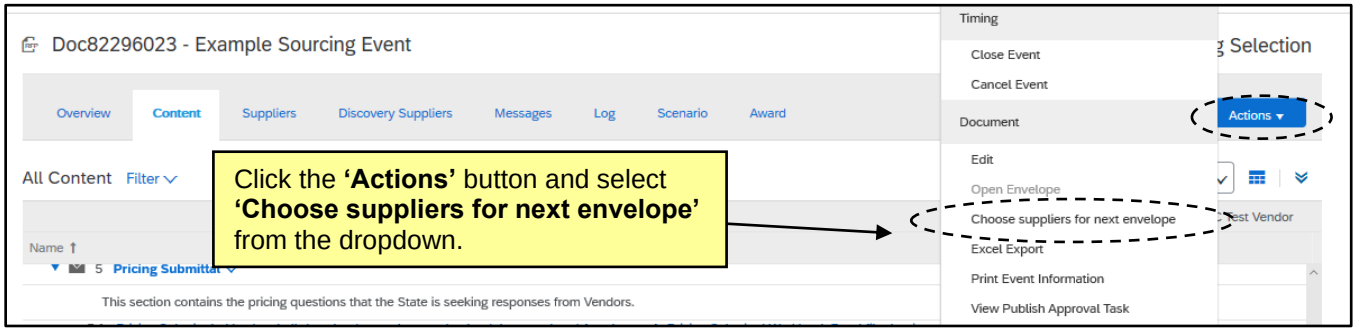


3. After P&C reviews and approves the first round of responses, the task will automatically update to **'Approved'** status and a checkmark will appear to the left. The user can now proceed onto determining which vendors will advance to the second step in the review process.

V. Opening the Second Envelope

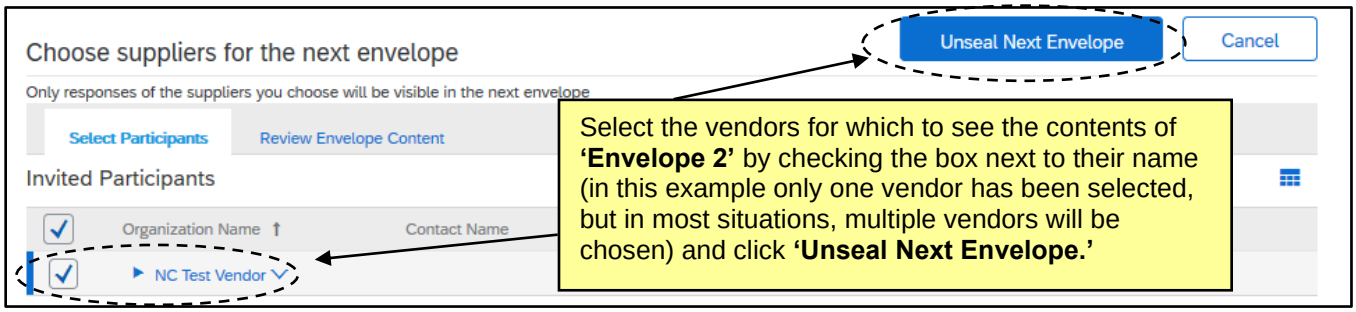
Once P&C has approved that the user can proceed with opening the cost proposal, users can decide which vendors will progress to the next round and open the remaining envelopes.

1. After receiving P&C approval to proceed to the second envelope, return to the Sourcing Event and click on the **'Actions'** button and select **'Choose suppliers for next envelope'** from the dropdown.

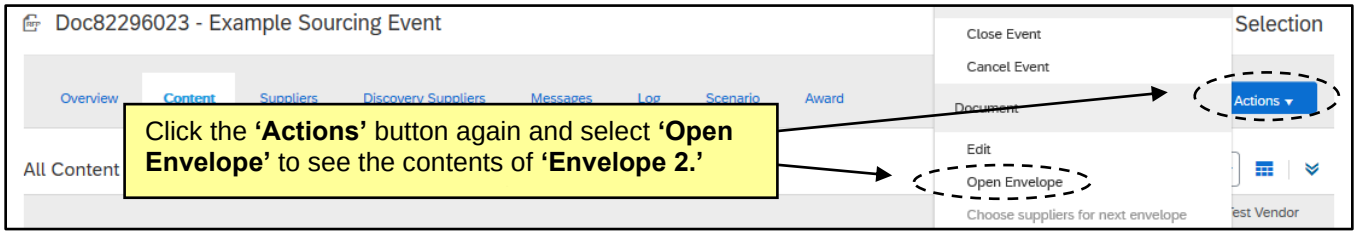


2. The **'Choose suppliers for next envelope'** page will display, and users can select for which vendors they'd like to see the next envelope's information. It can be for all vendors, or they can choose to exclude certain vendors if the information they saw in **'Envelope 1'** excluded them from moving on in the process. Check the boxes next to the vendors of interest and click the **'Unseal Next Envelope'** button.

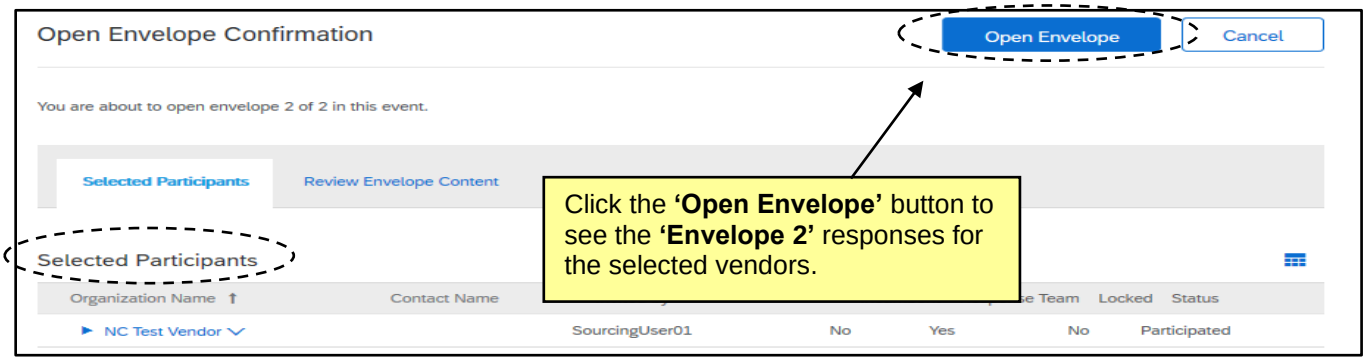
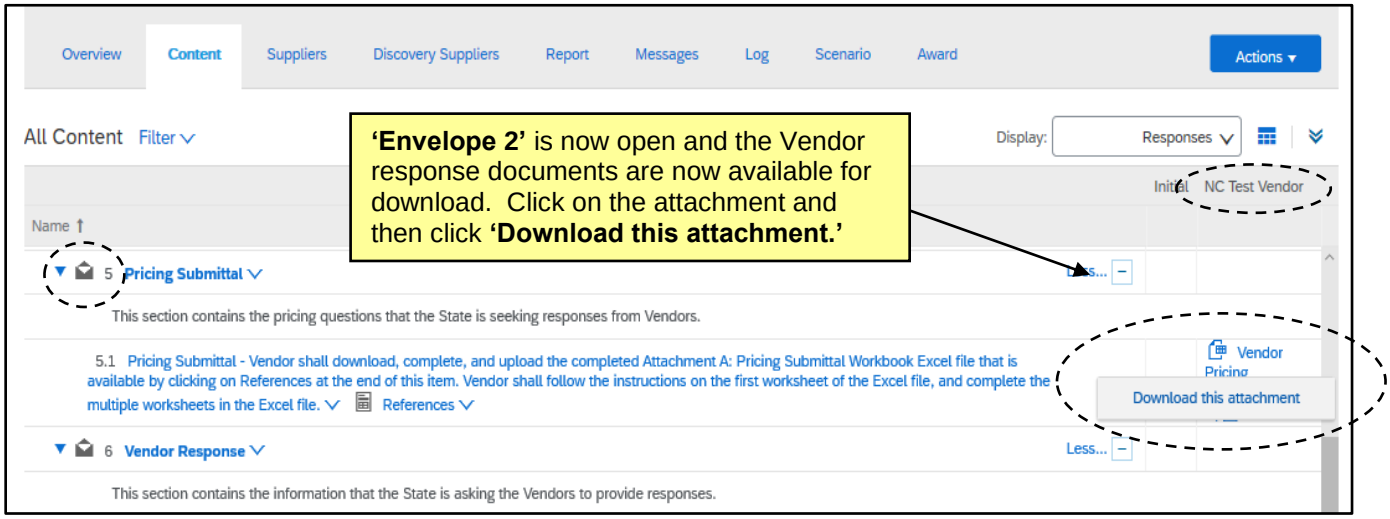
   Note: If the Sourcing Agent excludes certain vendors from the second round of consideration – either intentionally or inadvertently – the entirely of their bid submission will become **permanently unavailable** and they will appear as "rejected" in the Event **'Log'**. Proceed with caution when selecting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



3. On the **'Content'** tab, click the **'Actions'** button and select **'Open Envelope'** from the dropdown menu.



4. The **'Open Envelope Confirmation'** page will display listing all participating vendors. Click **'Open Envelope'** to compare the responses for the pricing information contained in **'Envelope 2.'**



5. On the **'Content'** tab, **'Envelope 2'** in Section 5 (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 and select **'Download this attachment'** from the popup to download and review the attachments.