# 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.

- 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)?"

State of North Carolina Sourcing Process Use this Process Template for all Solicitation Types.	Answer <b>'Yes'</b> to the second template question to conduct a "Two-Step" solicitation.				
What is the type of solicitation?			RFP	$\checkmark$	
The default number of Sourcing Event envelopes is 1, w	hich is standard for One-Step solicitations. Will this be a Two-Step solicitation (2 e	wellopes)?	Yes	$\mathbf{\vee}$	
			Please Select	One	
		·	Yes No	2	Cancel

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.

E	nvelope Rules						
	Number of En	velopes: 1	( ) (	)			
	Authorize Teams	s to Ope	o Envelope	+		lick the down arrow to	
	Envelope Id	Team 2	>	+		umber of envelopes.	
	1	Project ( 3		~ ]	Add r	more	

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.

Envelope Rules			
Number of E	nvelopes: 2 🗸 i		
Authorize Team	as to Open Envelopes		Click the down arrow and select <b>Search more</b> ' to set the team who will
Envelope Id	Team		be able to open the additional envelope.
1	Project Owner	V Add more	
2	(none)		
	Q Search more		

# **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.

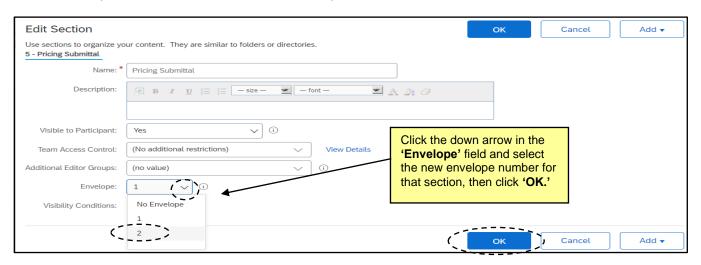
1. Note the envelope icon next to the section number and hover the cursor over it to display in which envelope that section's answers will be revealed.

1 Rules	All Content Filter 🗸	Display: Edit	Item 🗸 Actions 🔻 📰 🛛 💝
2 Suppliers	Name       3.1 This document includes details on the process and instructions on how to respon 3.2 which Question Template - Vendors Checking the provided Vendor hedule Section of this Sectoration.       Envelope 1       Image: A vendor of the section of this Sectoration.       Image: The section of the section of the sector of t	display in which envelope that	requested, information on the solicitation Doc.docx V Solicitation process via the Sourcing Tool's be received until the date and time listed in
4 Summary	This section requires Vendor to providi	ng identifying information.	

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.

Answer			
▼ ■ 5 Pricing Submittal ∨ 3.1 Add Venc	MITTAL Ind upload the completed Attachment A: Pricing Submittal Workt	Click the title of the section that needs to be tied to a different envelope and colored <b>Felit</b> from the drandown	m. Vendor shall
 follo Section	rksheet of the Excel file, and complete the multiple worksheets	select 'Edit' from the dropdown.	
▼ M 6 Lot Line Item	tion that the State is asking the Vendors to provide responses.		_
Action		Prev Next	Exit

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.

- 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.

TS	K477007505 Gain P&C /	Approval to Proceed with Opening (	Cost Proposal for Two-S	tep Solicitation	Round 1: Not Started	(i)
P&	C to provide review/approval of Bi	d Administrative Review, to confirm vendor respo Only)	nsiveness, prior to scheduling Ste	ep 2 Bid Opening.		
2.	Select Approvers	(no value)		From the 'Select Appr	overs'	
	Approval Rule Flow Type:	Parallel Pa		dropdown, add the app Service Team (for Non solicitations), add a 'D	oropriate P&C	
3.	Specify Due Date			click the 'Submit' butto	on.	
4.	Provide an initial message and c		3			
5.	Additional Attachments Submit	lark Cancelled				

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.

▼ ✓ 05 - CONDUCT SOURCING EVENT ∨		Project Owner	Complete 08/08/2022
Open Vendor Responses to Sourcing Event after Response Submission Deadline V	Sourcing Event 🗸	Project Owner	Not Started
Gain P&C Approval to Proceed with Opening Cost Proposal for Two-Step Solicitation V	Sourcing Event 🗸	classroomtraining37	Approved 08/08/2022

# 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.

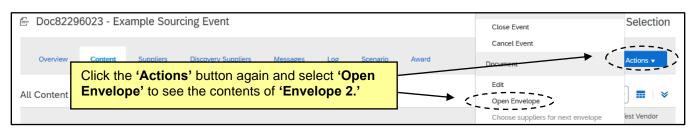


2. The 'Choose suppliers for next envelope' page will display, and users can select for which vendors they'd like to see the next envelope's information. It can be for all vendors, or they can choose to exclude certain vendors if the information they saw in 'Envelope 1' excluded them from moving on in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

Choose suppliers for the next envelope	Unseal Next Envelope	Cancel
Only responses of the suppliers you choose will be visible in the next enve	elope	1
Select Participants Review Envelope Content	Select the vendors for which to see the contents of 'Envelope 2' by checking the box next to their name	
Invited Participants	(in this example only one vendor has been selected,	
Organization Name     Contact Name     NC Test Vendor	but in most situations, multiple vendors will be chosen) and click ' <b>Unseal Next Envelope.'</b>	

#### 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.'**

Open Envelope Con	firmation				pen Envelope	2 Car	ncel
You are about to open envelope	e 2 of 2 in this event.		/	1			
Selected Participants	Review Envelope Content				_		
Selected Participants		Click the 'Open E see the 'Envelop the selected veno	e 2' respor				
Organization Name 1	Contact Name	the selected vent	1015.		e Team Lo	ocked Status	
NC Test Vendor V		SourcingUser01	No	Yes	No	Participated	

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.

Overview Content Supp	pliers Discovery Suppliers Report Messages Log Scenario	Award Actions -			
All Content Filter >	<b>'Envelope 2'</b> is now open and the Vendor response documents are now available for download. Click on the attachment and then click <b>'Download this attachment.'</b>	Display: Responses V III V			
This section contains the price	ing questions that the State is seeking responses from Vendors.	<b>13</b> –			
5.1 Pricing Submittal - Vendor	shall download, complete, and upload the completed Attachment A: Pricing Submittal Workbor es at the end of this item. Vendor shall follow the instructions on the first worksheet of the Exce				
▼ 🖬 6 Vendor Response ∨		Less –			
This section contains the information that the State is asking the Vendors to provide responses.					