

Non-IT Guided Sourcing Project Quick Guide

Introduction

This Guided Sourcing Project Quick Guide is intended to outline the straightest path through the process of creating an over-delegation Non-IT Sourcing Project, publishing its Sourcing Event, and determining the awarded vendor. More detailed information on Sourcing Projects, Sourcing Events, and awarding can be found in the full, respective Job Aids on the [Sourcing training page](#).

A Guided Sourcing Project (SP) is a container for all information and documents pertaining to a formal solicitation for bids on goods or services. A Sourcing Event is the most important part of a Sourcing Project and is the electronic forum for vendors to respond to the solicitation with their bids.



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 PURCHASE
ONLINE SHOPPING STATEWIDE TERM CONTRACTS
ELECTRONIC VENDOR PORTAL HUB CERTIFIED V
QUOTE PUNCHOUT CATALOG
PURCHASE ORDER
SOURCING
BIDDING
BUY



Create a Guided Sourcing Project.



Publish a Sourcing Event.



Interact with P&C to gain approval to conduct the Sourcing Event and award a winning bidder.

Non-IT Guided Sourcing Project Quick Guide

Initiate Guided 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.

The screenshot shows the Sourcing Project page with the following components:

- Navigation Bar:** HOME, SOURCING (selected), CONTRACTS, SUPPLIERS, FOR YOU. Action buttons: Manage, Create.
- Search Bar:** Sourcing Project (dropdown), Search using Title, ID, or any other term (input), Search (button), Refresh (button).
- Common Actions Portlet:** Create, Sourcing Project, **Guided Sourcing Project** (highlighted with a red box and a blue circle with the number 1).
- My Documents Portlet:** Table with columns: Title, Date, Status. Row: Personal Workspace, 2/18/2025, Draft.
- Event Status Portlet:** Table with columns: RFI, RFP, Auction, Forward Auction. Row: Draft, 0, 0, 0, 0.

- 2 The **Create guided sourcing project** page will display. Populate all relevant fields, including the required fields, as noted by a red asterisk (*). Select **Non-IT: Solicitation** in the **Solicitation Vehicle** field and **Lite Sourcing** in the **Execution Strategy** field.

The screenshot shows the Create guided sourcing project page with the following fields:

- Origin:** Guided Sourcing
- Entity:** Search by name or ID (input), Value must not be empty.
- Est. Total Contract Value (incl. Renewals):** (input), USD (dropdown), Value must be set.
- Estimated Base Contract Value:** (input), USD (dropdown), Value must be set.
- Solicitation Vehicle:** Search for a value (input), 1. Non-IT: Solicitation (selected with a blue circle with the number 2), 2. IT: RFP.
- Owner:** GSTrainer02 (input), Value must not be empty.
- Currency:** US Dollar (dropdown).
- Commodity:** Search by name or ID (input), Value must not be empty.
- Target Contract Award Date:** (input).

- 3 In the **Template** section, select **State of North Carolina Process – Guided Sourcing** and answer the questions presented, then click **Create**. If any special circumstances apply, please see the [Procurement Exceptions and RFI \(Non-IT\) Job Aid](#) for further guidance.

The screenshot shows the Create guided sourcing project page with the following fields:

- Template:** State of North Carolina Sourcing Process - Guided Sourcing (selected with a blue circle with the number 3).
- Have you reviewed the NCDIT guidance to confirm this solicitation does not include an IT component?** 2. Yes (selected with a blue circle with the number 3).
- What is the type of solicitation?** 1. Please Select One (selected with a blue circle with the number 3).
- 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)?** 3. No (selected with a blue circle with the number 3).

Non-IT Guided Sourcing Project Quick Guide

Complete Phase 01 Tasks for Intake Form and Team Section

- 1 In the **Events and other documents** section, open the **Intake Form Folder** and click into the **Non-IT Procurement Intake Form.pdf**.
- A. Click the three dots in the top right and select **Download** from the dropdown. Fill out and save the fillable PDF.
 - B. Click the three dots again and select **Replace document**. Select **Upload a new document**, click **Next**, find the completed PDF, then click **Replace** to add the completed version of the PDF.

Example Non-IT Sourcing Project / Intake Form Folder / Non-IT Procurement Intake Form.pdf

Non-IT Procurement Intake Form.pdf

Document | Not Edited | Doc1748489309 | Unlocked

Non-IT Procurement Intake Form

Completed By:		Date:	
Agency:		Division:	
Procurement Lead:		Procurement	

1A Download

1B Replace document

- C. In the **Tasks** section, check the box next to the **Upload Non-IT Procurement Intake Form** task, click the three dots in the **More actions** column, and click **Set to complete** in the dropdown.

Tasks

All (36) Assigned to me (0)

Phases and tasks	Type	Status	Owner	Due date	Ap...	Associate a document	Action	More actions
01 - IDENTIFY AND VALIDATE BUSINESS NEED	Phase	In Pr...	Project Ow...					...
<input checked="" type="checkbox"/> Upload Non-IT Procurement Intake Form*	To do	Not S...	Project ...			Intake Form Fol...	Set to started	...
<input type="checkbox"/> Confirm Sourcing Team Members and Roles	To do	Not S...	Project ...					
02 - DEVELOP SOURCING STRATEGY	Phase	Not S...	Project Ow...					

1C Set to complete

- 2 Click into the **Team** section and, if necessary, update it to include any users not already added, in particular to the **Project Owner** group so that other users can make edits. When done, return to the **Tasks** section and mark the **Confirm Sourcing Team Members and Roles** task **Complete**.

Non-IT Example Guided Sourcing Project

Strategic sourcing project | WS1782452481 | Original | Active

Project summary | Process | Project insights | Tasks | Events

Tasks

Search Sourcing Resources

Phases and tasks

- 01 - IDENTIFY AND VALIDATE BUSINESS NEED
- Upload Non-IT Procurement Intake Form*
- ☒ 2 Confirm Sourcing Team Members and Roles

Team

- Project Owner (Project Owner) [G] [A]
- Subject Matter Advisors (Access Participants Messages)
- System Administrator (Project Owner) [SA]

2

Non-IT Guided Sourcing Project Quick Guide

Populate Solicitation Document and Sourcing Event Folder

1 In the **Events and other documents** section, open the **Solicitation Document and Sourcing Event Folder**.

A. Check the boxes next to the **Solicitation Document** and **Bid Evaluation Matrix Tool – XXX Template** documents and click the **Download** button to download local copies.

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.

Events and other documents

All (31)Related to me (23)

Search

Sourcing Resources

Create

Upload1A

Download

Move

Copy

Delete

Folders and documents

> Intake Form Folder

> Solicitation Document and Sourcing Event Folder

RFP_Agency_Services.docx

Bid Evaluation Matrix Tool - RFP Template.xlsx

Non-IT RFP Agency Services Sourcing Event Template

Document Id

Type

Version

Status

Owner

Last modified on

Last i

WS17825...

Fo...

Orig...

10/23/2025

WS17824...

Fo...

Orig...

10/23/2025

Doc17824...

D...

v1

Not ...

PO

P

10/23/2025

G

Doc17824...

D...

v1

Not ...

PO

P

10/23/2025

G

Doc17824...

Ev...

v1

Not ...

PO

P

10/23/2025

G

B. After filling out both forms, click back into each, click the three dots in the top right, and select **Replace document** from the dropdown to load completed versions for P&C to review.

*** / Solicitation Document and Sourcing Event Folder / RFP_Agency_Services.docx

Close

RFP_Agency_Services.docx

Document | Not Edited | Doc1782452496 | Unlocked

INSTRUCTIONS TO AGENCIES
Department of Administration
Division of Purchase and Contract
Request for Proposals (RFP) Template for Services
For use in the Ariba Sourcing Tool
General Information

Download
View details
Publish
Lock
1B Replace document

C. If necessary, upload any additional documents for P&C to review by checking the box next to the **Solicitation Document and Sourcing Event Folder** and clicking the **Upload** button.

Events and other documents

All (31)Related to me (0)

Search

Sourcing Resources

Create

1CUpload

Download

Move

Copy

Delete

Folders and documents

Document Id

Type

Version

Status

Owner

Last modified on

Last modified by

>

Sourcing Project Documents

WS17824...

Fo...

Orig...

P

10/23/2025

>

Intake Form Folder

WS17825...

Fo...

Orig...

P

10/23/2025

>

Solicitation Document and Sourcing Event Folder

WS17824...

Fo...

Orig...

P

10/23/2025

Agency Solicitation Document.docx

Doc17824...

D...

v2

Draft

P

10/23/2025

G

GSTrain...

Agency Bid Evaluation Matrix.xlsx

Doc17824...

D...

v2

Draft

P

10/23/2025

G

GSTrain...

Non-IT RFP Agency Services Sourcing Event Tem...

Doc17824...

Ev...

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Not ...

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10/23/2025

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GSTrain...

Non-IT Guided Sourcing Project Quick Guide

2 In the **Events and other documents** section, click on the **Sourcing Event Template** to initiate the Sourcing Event. The **Create guided sourcing project** page will display.

A. Populate the **Name** and **Description** fields with pertinent information then click **Create**.

Non-IT RFP Agency Services Sourcing Event Template

<PLEASE INSERT DESCRIPTION HERE>

B. 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**.

December 2024

12:00 AM

2B

Save

C. 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.

D. 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 **Populate Solicitation Document** and **Sourcing Event Folder** task **Complete** in **Phase 03**.

6.6 ATTACHMENT H: ACKNOWLEDGMENT...

2C

2C

Save and close

Non-IT Guided Sourcing Project Quick Guide

Gain P&C Approval of Solicitation Document and Sourcing Event

1 When the task is complete in **Phase 03**, the Sourcing Project Owner can proceed to **Phase 04** to submit the Solicitation Document and Sourcing Event for approval by P&C.

A. In the **Tasks** section, click on the **Gain P&C Approval of Sourcing Event** task. On the subsequent page, the approval flow will be set automatically. The **Due date** can be added by selecting the **Edit** button, using the date picker in the **Due date** field and clicking **Save**.

Task details

General information

Name * Gain P&C Approval of Sourcing Event

Owner * Project Owner

Due date * Date Duration Select due date

Observers * Select observers

Description

INSTRUCTIONS: Agency Procurement should complete Due Date, provide any comments, and select 'Submit'.

Show more

1A

B. Click the **Submit** button in the upper right-hand corner of the screen.

Example Non-IT Sourcing Project / 04 - REVIEW AND APPROVE SOURCING EVENT / Gain P&C Approval of Sourcing Event

Gain P&C Approval of Sourcing Event

Approval | Not Started | TSK1413089486

Task details Associated document Task type and process Comments and activity history

1B

Finalize and Publish the Sourcing Event

1 After receiving approval from P&C 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** 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 a PDF of 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 04**.

1C

3.0 Solicitation Document and Details

This section contains the details of the Solicitation, including de...

3.1 SOLICITATION DOCUMENT This docu...

Attachment

1D

SAMPLE BLANK DOCUMENT.doc (40.50 KB)

Drag a file or browse to upload (< 100 MB).

Non-IT Guided Sourcing Project Quick Guide

Conduct Sourcing Event and Mark Phase 05 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 through Event Messages, 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 four of those tasks after envelopes have been opened are required to be completed. For more detailed information on updating the Event while it's open, please see the [Managing and Awarding a Sourcing Event \(Non-IT\)](#) job aid.

A. When the Sourcing Event is complete and envelopes have been opened, the first required task is to **Post Preliminary Bid Tabulation to eVP**. When this has been completed in eVP, mark that task **Complete**, and do the same for the **Evaluate Vendor Responses** task.

B. The **Bid Administrative Review (To determine responsiveness)** task is tied to a document in the **Award Recommendation Documents** folder. Open that folder in the **Events and other documents** section and download the **Bid Administrative Review Template**, fill it out, then replace it with the completed version. Mark the task **Complete** after updating the document.

C. The **Bid Evaluation (To determine responsibility)** task is also tied to a placeholder document in the **Award Recommendation Documents** folder. The template for this document, though, is the preliminary version of the **Bid Evaluation Matrix** document previously loaded in the **Solicitation Document and Sourcing Event Folder**.

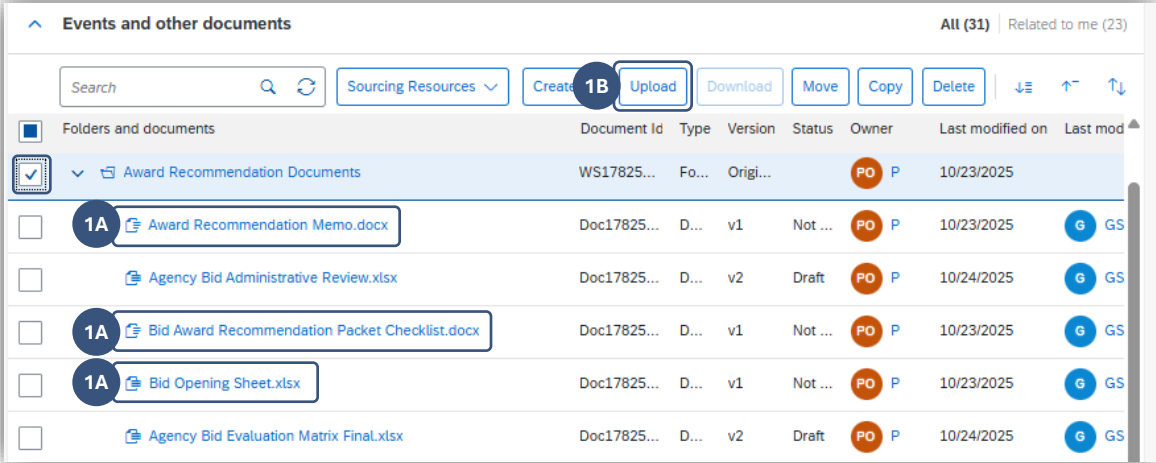
Download and complete the reviewed and approved **Bid Evaluation Matrix** document from that folder then return to the **Award Recommendation Documents** folder and replace the **Replace with completed Bid Evaluation Matrix Tool – XXX Template** document with the final version. Mark the task **Complete** after updating the document.

Events and other documents							All (31)	Related to me (23)
<input type="checkbox"/>	Folders and documents	Document Id	Type	Version	Status	Owner	Last modified	
<input type="checkbox"/>	<input checked="" type="checkbox"/> Award Recommendation Documents	WS17825...	Fo...	Orig...		PO P	10/23/2025	
<input type="checkbox"/>	<input type="checkbox"/> Award Recommendation Memo.docx	Doc17825...	D...	v1	Not ...	PO P	10/23/2025	
<input type="checkbox"/>	<input checked="" type="checkbox"/> 1B Bid Administrative Review Template.xlsx	Doc17825...	D...	v1	Not ...	PO P	10/23/2025	
<input type="checkbox"/>	<input type="checkbox"/> Bid Award Recommendation Packet Checklist.docx	Doc17825...	D...	v1	Not ...	PO P	10/23/2025	
<input type="checkbox"/>	<input type="checkbox"/> Bid Opening Sheet.xlsx	Doc17825...	D...	v1	Not ...	PO P	10/23/2025	
<input type="checkbox"/>	<input checked="" type="checkbox"/> 1C Replace with completed Bid Evaluation Matrix Tool - XXX Template.xlsx	Doc17825...	D...	v1	Not ...	PO P	10/23/2025	

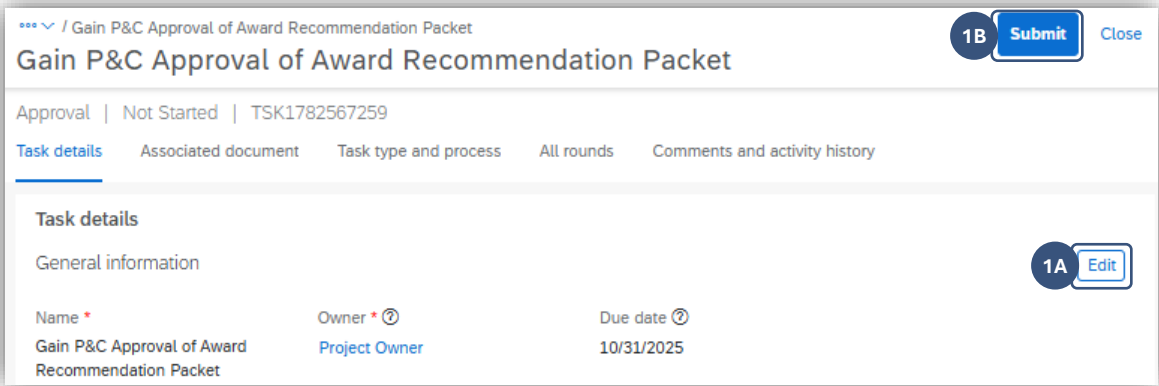
Non-IT Guided Sourcing Project Quick Guide

Gain P&C Approval of Award Recommendation Packet

- 1 After all vendor response information has been received and considered, the Project Owner can develop the **Award Recommendation Packet** and send it to P&C for approval. If a BAFO is needed, please see the [Managing and Awarding a Sourcing Event \(Non-IT\)](#) job aid.
- A. In the **Award Recommendation Documents** folder, download, complete, and replace the **Award Recommendation Memo**, the **Bid Award Recommendation Packet Checklist**, and the **Bid Opening Sheet** documents.
- B. Upload any additional documents for P&C to review by checking the box next to the **Award Recommendation Documents** folder and clicking the **Upload** button at the top. When all required documents have been replaced or added, navigate to the **Tasks** section and mark the **Develop Award Recommendation Packet** task **Complete**.



- 2 Click on the **Gain P&C Approval of Award Recommendation Packet** task. On the subsequent page, the approval flow will be set automatically.
- A. Click **Edit** to set the **Due date**, then click **Save**.
- B. Click **Submit** to send the task to P&C.

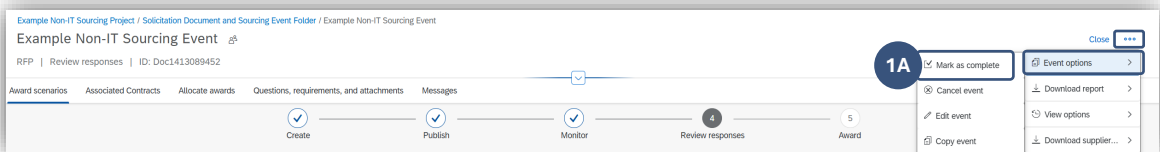


Non-IT Guided Sourcing Project Quick Guide

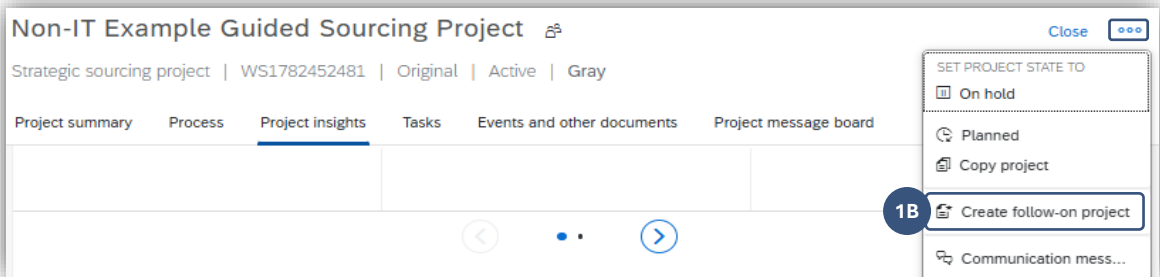
Completing the Sourcing Event and Project

1 Once the solicitation has been officially awarded per the process outlined by P&C, and the Sourcing Project Owner is certain that no more communication with the responding vendors will be necessary, the status of both the Sourcing Event and Sourcing Project should be marked **Complete** for clarification purposes.

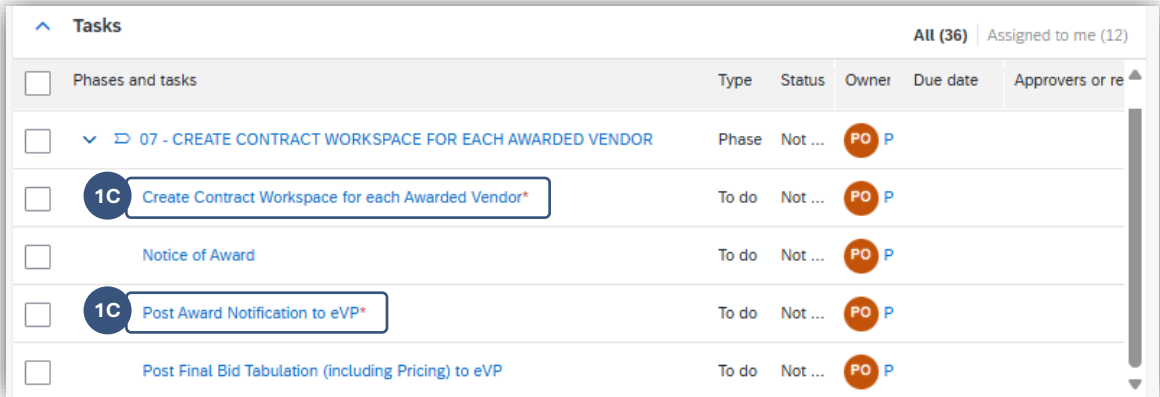
A. Navigate to the Pending Selection Sourcing Event, click the three dots in the top right, hover over **Event options**, and select **Mark as complete** from the popup.



B. Back on the Sourcing Project, click the three dots in the top right 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.



C. In **Phase 07** of the **Tasks** section, mark the tasks for **Create Contract Workspace for each Awarded Vendor** and **Post Award Notification to eVP** as **Complete**.



D. 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.

