This Sourcing Project Quick Guide is intended to outline the straightest path through the process of creating a 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.

A 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.

I. Initiate Sourcing Project and Enter Attributes

1. Click the ‘Sourcing Project’ link under the ‘Create’ header in the ‘Common Actions’ portlet on the left.

2. The ‘Create Sourcing Project’ page will display. Populate all relevant fields, including the ten required fields, as noted by an asterisk (*). Select ‘Non-IT: Solicitation’ in the ‘Solicitation Vehicle’ field.

   **Note:** Selecting ‘Lite Sourcing’ from the ‘Execution Strategy’ dropdown is most common.

3. In the ‘Select a template’ section of the ‘Create Sourcing Project’ page, note the radio button next to the ‘State of North Carolina Sourcing Process’ template is automatically selected. Users will be prompted to answer two questions indicating whether the solicitation will be an ‘RFP’ or ‘IFB,’ and whether it will follow a “Two-Step” process or not. One envelope is standard, so users should select the default option of ‘No’ in the second question to follow the most common path.

4. Click the ‘Create’ button on the top or bottom right of the screen.
II. Navigate to the Team Tab and Confirm Sourcing Team Members

After clicking ‘Create’ on the Sourcing Attributes page, the Sourcing Project (SP) is saved and the ‘Overview’ tab is displayed. Navigate to the ‘Team’ tab and add any other users that you want to have access to the SP. By default, only the user who clicked ‘Create’ can see the SP at this point.

1. On the ‘Team’ tab, click on ‘Actions’ and select ‘Edit’ from the dropdown to add other users as members to the preloaded groups.

   Note: Users added to the ‘Project Owner’ group will be able to edit the SP, not just view it.

2. On the ‘Team’ page, change a ‘Team Member’ by clicking on the down arrow in the ‘Members’ box or click on ‘Add more’ to include other users. There is also an ‘Add Group’ button that will allow for additional ‘Team Groups’ to be added. When all changes have been made, click ‘OK.’

   Note: Any changes made to the ‘Team’ tab within a SP only apply to that SP and not to other SP’s also created by the same user.

III. Navigate to the Documents Tab for the Solicitation Document and Sourcing Event

The ‘Documents’ tab is a central storage location for all documents related to a Sourcing Project (SP). By default, it includes folders for the ‘Solicitation Document’ and ‘Sourcing Event’ among others. Users can find the template provided for the Solicitation Document in the ‘Solicitation Document’ folder. To complete the Solicitation Document, view the Sourcing Event to get the Event’s ‘Document Number.’
1. To download the Solicitation Document template provided by the state, select 'Download' from the dropdown that appears after clicking on the Solicitation Document template. Open the template and begin editing.

2. Click on the Event template in the ‘Sourcing Event’ folder and select ‘View Details’ from the dropdown.

3. Note the ‘Document Number’ beginning with ‘Doc.’ This will be used as the ‘Solicitation Number’ on the first page of the Solicitation Document and display as the same in Public eVP. When this number has been captured, click ‘Actions,’ and select ‘View Project’ from the dropdown.

4. When the Solicitation Document has been finalized, return to the ‘Documents’ tab, click on the Solicitation Document template once again, and select ‘Replace Document.’ Follow the steps on the subsequent pages to ‘Replace document by the updated file’ and click ‘OK.’
5. Users should also replace the ‘Preliminary Review Procurement Checklist Template’ with a completed version in the ‘Solicitation Document’ folder and add any other supporting documents that should be included in the review.

IV. Initiate Sourcing Event and Manage Event Content

The Sourcing Event is the interactive part of the Sourcing Project (SP) where vendors can provide their responses. Section 3 (Content) is the most important part of the Event. Users will load their completed Solicitation Document in subsection 3.1 for vendors to download, fill out (including an ‘Execution’ section to capture a signature that can be used in contract documentation), and return. Users may also need to generate a Pricing Document to load for the vendor in subsection 5.1.

The information included in the Solicitation Document template is coordinated with the information in the content of the Event. The Solicitation Document has many of the specific details regarding the solicitation and is returned by the vendor in the Event, which also contains preloaded attachments (such as HUB status and References) for vendors to download and return. Users have the option to include additional attachments in the Event Content for vendors to fill out and return and can adjust or remove any preloaded attachments that may not be relevant to their Solicitation.

1. From the ‘Documents’ tab, click on the Event template in the ‘Sourcing Event’ folder and select ‘Edit’ from the dropdown to access the Event.

2. After adding a ‘Title’ and ‘Description’ on the subsequent ‘Edit Event’ page and clicking ‘OK,’ Section 1 (Rules) of the Event will display. Under ‘Timing Rules,’ set the ‘Due date’ field to ‘Fixed time’ and select the date and time for vendor bids to be due established in the Solicitation Document.

   Note: The ‘Due Date’ may need to be adjusted before the Event is published if changes are made during the approval process.
3. When the ‘Due date’ has been set, click onto Section 3 (Content) on the left side of the screen.

4. Scroll to Section 6 to review the Vendor Response subsections and attachments. Content can be added, deleted, or edited as necessary by checking the box next to the relevant subsection and clicking the appropriate button below. This ‘Content’ should be complementary to that in the solicitation document, i.e., if an attachment is included in the document, it should be removed from the ‘Content’ page.

**Notes**
- If the solicitation is being sent to P&C for approval, users will need to revisit and update this portion of the ‘Sourcing Event’ after approval is granted but before publishing.
- If the solicitation is being sent to P&C for approval, click the ‘Exit’ button in the top right and select ‘return to project,’ then navigate to the ‘Tasks’ tab. If no approvals are necessary, skip the next section of this document.

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<tr>
<th>Section 3 (Content)</th>
<th>Section 6</th>
<th>Vendor Response Subsections and Attachments</th>
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V. Send Solicitation to P&C for Approval

If the solicitation needs to be approved by P&C before publishing, users will do that via the built-in ‘Gain P&C Approval of Sourcing Event’ task in ‘Phase 04’ of the ‘Tasks’ tab.

1. On the ‘Tasks’ tab, click on the ‘Gain P&C Approval of Sourcing Event’ task and select ‘View Task Details’ from the drop down.

2. On the subsequent ‘Approval Task’ page, add the appropriate P&C Service Team as an approver (through clicking on the ‘Custom’ link), add a ‘Due Date,’ and click ‘Submit’ to send the request to P&C.
3. After P&C reviews and approves the solicitation, the task will automatically update to 'Approved' status and a checkmark will appear to the left. The user can proceed to finalizing their ‘Solicitation Document,’ then updating and publishing the ‘Sourcing Event.’

VI. Finalize and Publish the Sourcing Event

After receiving approval from P&C, users should finalize and PDF their ‘Solicitation Document’ then return to Section 1 (Rules) of the ‘Sourcing Event’ to update any dates that may have changed during the approval process, and Section 3 (Content) to attach the final version of the ‘Solicitation Document’ to subsection 3.1 and make any other necessary updates.

Users will navigate to Section 2 (Suppliers) where they will invite the designated ‘NC eProcurement Sourcing’ supplier before the Sourcing Event can be published in Section 4 (Summary).

1. Access the Sourcing Event and verify the ‘Due date’ under ‘Timing Rules’ in Section 1 (Rules).

2. To add the finalized Solicitation Document, click onto Section 3 (Content) on the left side of the screen. Scroll to subsection 3.1 and click on the blue text in that field. Select ‘Edit’ from the dropdown menu.

3. Click the ‘Update file’ link and select ‘Upload a file from desktop’ to replace the sample document with the finalized Solicitation Document.

4. Scroll down to Subsection 5.1 and click on the blue text in that field. Select ‘Edit’ from the dropdown menu as shown above in Step 4. Click on the ‘Attach a file’ link in the ‘Reference Documents’ field and select ‘Upload a file from desktop.’ This file will serve as a Pricing form for the vendor to fill out and return with the pricing offered on their bid.

Notes:
- The default language in the ‘Name’ field lists this document as an ‘Excel’ file. If it is a different type of file, like a ‘Word’ document, edit that wording to accurately reflect the document type.
- This section can be deleted if the Pricing form has been included in the Solicitation Document.
5. Review the attachments in the Vendor Response section and adjust if necessary, particularly if changes were made to the Solicitation Document during the approval process.

6. Click onto Section 2 (Suppliers), click ‘Invite Participants,’ and search for and select the designated ‘NC eProcurement Sourcing’ supplier.

7. Click onto Section 4 (Summary). If all required aspects of the Event have been completed, the ‘Publish’ button will be blue and clickable. If there are still incomplete aspects, it will be grayed out, and a message should alert the user to what is missing. Scroll down to review this page to confirm all information is accurate before clicking ‘Publish.’ If edits are necessary, click the ‘Actions’ dropdown to edit the ‘Overview,’ or return to any of the Sections to make changes. Any changes after clicking ‘Publish’ would need to be made in the form of an addendum.

8. The published Sourcing Event is now automatically posted to Public eVP and the HUB Opportunities page. If there were any issues with the public posting, the user will receive an email stating “There was an error while posting your solicitation.” For more information on the eVP version of the solicitation, please see the ‘Viewing Posted NCEP Solicitations in eVP’ Job Aid.
VII. Send Award Recommendation to P&C for Approval

If the solicitation was approved by P&C before publishing, the ‘Award Recommendation Memo’ will also need to be approved before the solicitation can be officially awarded to a supplier. This is done via the built-in ‘Gain P&C Approval of Award Recommendation Memo’ task in ‘Phase 06’ of the ‘Tasks’ tab.

1. On the ‘Documents’ tab, open the ‘Award Recommendation Documents’ folder and click on the ‘Award Recommendation Memo’ document. Select ‘Download’ from the dropdown, fill out the form and save a local copy, then click back onto the template and select ‘Replace Document’ to upload the completed version of the ‘Award Recommendation Memo.’ This must also be done for the ‘Bid Award Recommendation Packet Checklist,’ which can also be found in this folder, and users should upload any other relevant documents.

2. Navigate to the ‘Tasks’ tab, click on the ‘Gain P&C Approval of Award Recommendation Memo’ task and select ‘View Task Details’ from the drop down.

3. On the subsequent ‘Approval Task’ page, add the appropriate P&C Service Team as an approver, add a ‘Due Date,’ and click ‘Submit’ to send the request to P&C.

4. After P&C reviews and approves the documents in the ‘Award Recommendation Documents’ folder, the task will automatically update to ‘Approved’ status and a checkmark will appear to the left. The user can now proceed through the remaining steps to officially award the solicitation.