

NC electronic Vendor Portal

Posting Solicitations in the eVP Agency App



When a State Procurement User (PU) needs to post a formal solicitation requesting bids from the public for goods or services, they will do so via the electronic Vendor Portal (eVP) Agency App. PUs will set important information like the timing of the solicitation as well as setting the commodity codes by which the NC vendor community will be alerted of the opportunity. While the solicitation is open for bidding, PUs can create addendums as needed, and once the solicitation is no longer accepting bids, the PU will be able to download and view all responses to help guide the decision on which vendor should be awarded the procurement. PUs who create their solicitations in the NC eProcurement Sourcing tool should see the [‘Viewing Posted NCEP Solicitations in eVP’](#) job aid.

I. Create a New Solicitation

1. From the dashboard of the Agency App, click on **‘Solicitations’** in the navigation panel. A list of the State Procurement User’s (PU) active solicitations will display.
2. Click on the **‘New’** tab on the command bar at the top of the screen.



3. The **‘New Solicitation’** screen will display. Populate all relevant fields on the **‘General’** tab including the ten required fields as noted by an asterisk (*).

4. **Project Title***: Enter a title for the solicitation to give a basic summary of the nature of the solicitation. There is a 100-character limit in this field.
5. **Description***: Describe the solicitation being posted. There is a 4,000-character limit in this field.
6. **Solicitation Number***: Assign a number to the solicitation (letters and special characters are also permitted in this field).

Notes:

- The solicitation number entered must be unique within the PU’s Department.
- When the solicitation is posted, it will automatically include a prefix number specific to the PU’s Department that is not visible at this point.

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7. **Opening Date***: Use the Date Picker to assign the date on which bids will be opened.

Notes:

- This date must be at least 3 business days or more after the date the solicitation is posted.
- This date cannot be on a state of North Carolina holiday.

8. **Opening Time***: From the dropdown menu, set the time at which the bids can be opened on the previously assigned '**Opening Date.**' This field defaults to '**2:00 PM,**' but can be changed.

9. **Category**: This field represents the first and most general part of the commodity code and will be auto populated once the '**Commodity Code**' field is selected.

10. **Commodity Family**: This field represents the second and slightly more specific part of the commodity code and will be auto populated once the '**Commodity Code**' field is selected.

11. **Commodity Code***: This is the field that should be selected to indicate the nature of the goods or services for which the PU is requesting a bid. This is a lookup table. Click the magnifying glass and select '**Advanced Lookup**' from the popup menu. On the subsequent '**Choose commodity code for Commodity Code**' page, type a search term or code number in the search box at the top and let the search results update. Select the radio button next to the desired result and click '**Done**' to add that code to the solicitation. The two fields above will automatically update to match.

Notes:

- Although only one Commodity Code can be selected per solicitation, choosing one that ends in '**00**' will notify all vendors who have the previous four digits selected no matter what their final two digits are. For example, selecting the commodity code '**561000**' will cover codes '**561015**' through '**561019**'.
- Commodity Code selections are used to notify vendors registered in eVP of opportunities for business that match the type of business they conduct.

12. **Mandatory Conference/Site Visit**: If necessary, enter the date of any Mandatory Conference or Site Visits associated with the solicitation from the Date Picker.

13. **Special Instructions**: Enter any special instructions for the vendors to take into consideration as they evaluate and respond to the solicitation.

14. **Solicitation Type***: From the dropdown menu, select the type of solicitation for which the PU is seeking bids or responses. Three options are available:

- RFP
- IFB
- RFI

15. **Type Contract***: From the dropdown menu, select the type of contract for which the PU is seeking bids. This field defaults to '**Agency Contract,**' but the following three options are available:

- Agency Contract
- Agency Specific Term Contract
- IT Convenience Term Contract

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16. **Post Solicitation***: From the dropdown menu, select the method in which responses are desired. Options include **'E-Bid'** and **'Paper.'**

17. When all fields have been completed, click **'Save'** or **'Save & Close'** on the command bar to save the solicitation in the system.

Notes:

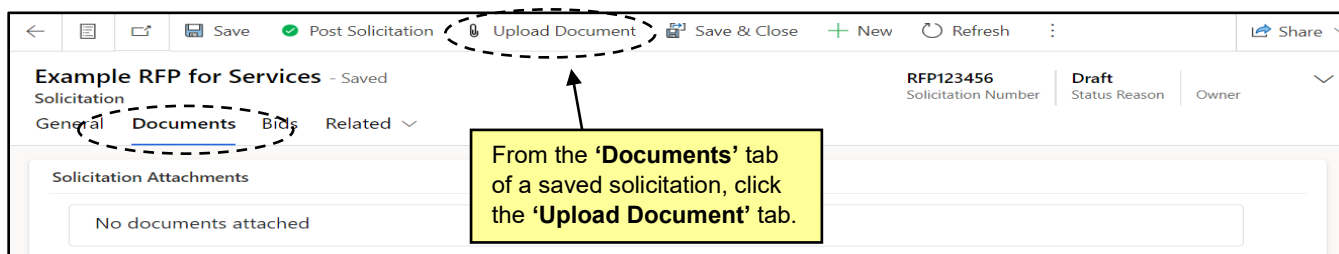
- Clicking **'Save'** will keep the PU in the current solicitation on the **'General'** tab.
- Clicking **'Save & Close'** will return the PU to a list of their **'My Active Solicitations.'** From here, clicking the **'Project Title'** will take the PU back to the solicitation.
- If a required field has not been completed, a red error message will let the PU know that field must be completed before the new solicitation can be saved.
- All fields are still editable until the solicitation is posted, but changes must be saved if the PU plans to post later.
- Saved solicitations will display in **'Draft'** status before they are posted. While in **'Draft'** status, solicitations can be deleted if it's determined they were created in error or no longer needed. For more details on deleting a solicitation in **'Draft'** status, please see **Section VIII** of this document.



II. Attaching a Solicitation Document

When all information on the **'General'** tab has been completed and saved, the State Procurement User (PU) should navigate to the **'Documents'** tab to attach their Solicitation Document for vendors to download and consider while building their response.

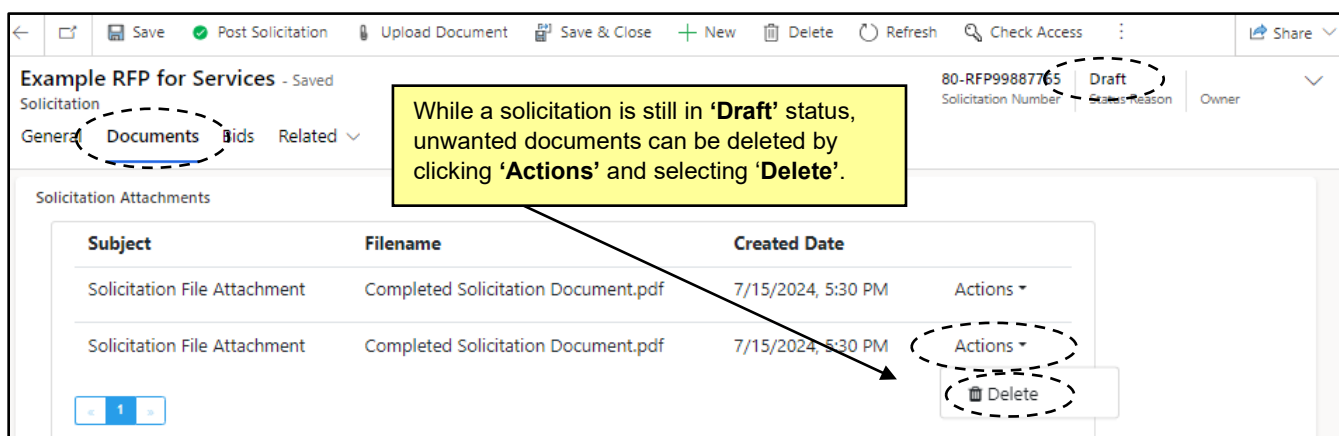
1. When a solicitation has been saved, the **'Title'** will display in the upper left, and the **'Solicitation Number'** will display in the upper right no matter which tab a PU is on. The status will remain **'Draft'** until it's posted. Additionally, PUs will now see a **'Post Solicitation'** and **'Upload Document'** button on the command bar.
2. Navigate to the **'Documents'** tab. On a new solicitation, a message of "No documents attached" will appear. If a document has already been attached, it will be displayed in the **'Solicitation Attachments'** section. Click the **'Upload Document'** tab on the command bar.



3. Select a document to upload from a local file and click **'Open.'** When a document has been uploaded, a message stating "File successfully attached to note" will appear, and the document will display in the **'Solicitation Attachments'** section of the **'Documents'** tab. If the document does not appear immediately, click the **'Refresh'** button on the command bar to force an update.

Notes:

- The following file types are permitted: MS Word, MS Excel, PDF, JPG, JPEG, PNG, MP4, CAD, DWG, Zip
- Files of up to 125 MBs are permitted.
- PUs may upload more than one document if desired.
- Clicking on the **'Filename'** of an attached document will download the document for the PU.
- A document uploaded in error can be deleted while a solicitation is still in **'Draft'** status by clicking **'Actions'** next to the document on the **'Documents'** tab and selecting **'Delete'** from the dropdown. Once a solicitation has been posted, documents cannot be deleted.





III. Posting a Solicitation

When the State Procurement User (PU) has completed all information about the solicitation and attached necessary documents, the solicitation can be posted to Public eVP to begin gathering vendor responses.

1. From the **'General'** tab on a **'Draft'** solicitation, click the **'Post Solicitation'** button on the command bar.

Example RFP for Services - Saved

Solicitation Number: RFP123456 | Status: Draft | Owner: [User]

General | Documents | Bids | Related

Project Title: * Example RFP for Services

Description: * Example solicitation for Services

When a solicitation is ready to be posted, click the **'Post Solicitation'** button.

2. The **'Post Solicitation Confirmation'** popup will appear asking the PU to confirm that it is ready to be posted publicly. If so, click **'OK.'**

Note: If no document is attached, a warning message of "Posting this Solicitation cannot be completed until required document is uploaded" will appear and the solicitation will not be made public.

Example RFP for Services - Saved

Solicitation Number: 00-RFP123456 | Status: New | Owner: [User]

General | Documents | Related

Project Title: * Example RFP for Services

Description: * Example solicitation for Services

Opening Time: *

Category: * Industrial Cleaning Services

Post Solicitation Confirmation

Please confirm that you would like to post this solicitation. It will become visible to Vendors via the Portal and this form will become read-only.

OK | Cancel

Click **'OK'** on the **'Post Solicitation Confirmation'** popup if the solicitation is ready to be made public.

3. The solicitation will move to a status of **'Open,'** its details will become read-only as noted by lock icons to the left of each field, and it will be visible to vendors via the Public eVP.

Note: Announcements of new solicitations will be included in the nightly Bid Notification email sent to vendors registered for the commodity code on the solicitation.

Example RFP for Services - Saved

Solicitation Number: RFP123456 | Status: Open | Owner: [User]

General | Documents | Bids | Related

Project Title: * Example RFP for Services

Description: * Example solicitation for Services

The solicitation's status is now **'Open'** and its details are now read-only per the lock icons.



IV. Viewing Solicitations within the Agency App

Via the **'Solicitations'** link on the dashboard's navigation panel, State Procurement User's (PU) can view and manage their solicitations, which are broken down into two categories: **'Active'** and **'Inactive.'**

1. From the dashboard of the Agency App, click on **'Solicitations'** in the navigation panel. A list of the State Procurement User's (PU) **'My Active Solicitations'** will display.
2. Clicking on the **'Project Title'** will take the PU to the selected solicitation. Solicitations on this page can have four **'Status Reasons'**:
 - **Draft:** A saved solicitation that has yet to be posted.
 - **Open:** A posted solicitation whose **'Opening Date'** is in the future for which bids are still being accepted.
 - **Pending Selection:** A posted solicitation whose **'Opening Date'** is in the past but has not yet been awarded.
 - **Awarded:** A posted solicitation that has been completed for which the **'Award'** Notification has been posted to the eVP Portal.

Notes:

- PUs can search for specific solicitations by keyword in the **'Filter by Keyword'** search box.
- It is advised that all searches begin with an asterisk (*) to improve search functionality.
- Solicitations can be sorted by any of the columns by clicking on the column header and selecting an alphabetical or chronological order. An arrow next to the column header will indicate which column is the current sorting column.

Solicitation Number	Project Title	Description	Opening Date	Status Reason	Created On
00-RFP123456	Example RFP for Services	RFP for Services	5/29/2023 2:00 PM	Awarded	5/19/2023 3:12 PM
RFP55567	Janitorial Services	Janitorial Services for 3 B...	6/7/2023 2:00 PM	Pending Sel...	6/2/2023 4:24 AM
RFP123456	Example RFP for Services	Example solicitation for ...	7/13/2023 2:00 PM	Open	6/15/2023 2:35 AM

3. Clicking the down arrow next to **'My Active Solicitations'** will display an option to view **'Inactive Solicitations.'**

Note: The option for **'Active Solicitations'** will display all solicitations created in the user's organization, not just their own. Solicitations created by other users are editable.

Solicitation Number	Project Title	Description	Opening Date	Status Reason	Created On
		RFP for Services	4/20/2023 10:30 PM	Pending Sel...	4/20/2023 3:14 PM
	Services	Example RFP For Services	4/24/2023 4:00 AM	Pending Sel...	4/21/2023 11:48 AM



- The **'Inactive Solicitations'** page will display for PUs to view solicitations that have been **'Canceled.'**

The **'Inactive Solicitations'** page will display **'Canceled'** solicitations.

Solicitation Num...	Project Title	Description	Opening Date	Status Reason	Created On
IFB123456	Example IFB for Goo...	Requesting quotes on 2 items	4/28/2023 2:00 ...	Canceled	4/26/2023 2:17 ...

V. Creating an Addendum on a Posted Solicitation

If the State Procurement User (PU) needs to update a posted solicitation, they can do so by creating an **'Addendum.'** Common reasons for an addendum are to post answers to vendor questions or to change the **'Opening Date'** of a solicitation. PUs can create as many addenda as required, and the system will automatically number them.

- From an **'Open'** solicitation, click the **'Addendum'** button on the command bar.

Click **'Addendum'** on the command bar.

- A **'New Solicitation Addendum'** popup will display. All fields with the exception of **'Name'** and **'Description'** are once again editable on the solicitation, and the **'Cancel Solicitation'** field defaults to **'No.'** Enter a reason for the addendum in the **'Addendum/Change Description'** field.
- Adjust any other values in the editable fields, such as the **'Opening Date,'** and click **'Save.'**

Note: Updates to the **'Special Instructions'** field will overwrite the existing instructions. If the existing instructions need to remain visible, add the new instructions after the existing information.

Describe the reason for the addendum in the **'Addendum/Change Description'** field and adjust any other editable fields that need changing, then click **'Save.'**

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- The addendum will be saved and **'Post Addendum'** and **'Upload Document'** buttons will appear on the command bar. If the addendum requires an attachment, click the **'Upload Document'** button.

Example RFP for Services Addendum

Save Post Addendum Upload Document Save & Close Delete Share

Example RFP for Services Addendum - Saved

Solicitation Addendum

00-RFP123456 Example RFP for Services Active

Solicitation Number Solicitation Status Reason Owner

General

Name * Example RFP for Services Addendum

Addendum / Change * Addendum #1: Answers to vendor questions posted.

Description

- Select a document to upload from a local file and click **'Open.'** When the success message displays, click **'OK'** then click **'Save'** and exit the saved addendum page. If there is a delay in the attachment displaying in the **'Attachment(s)'** section at the bottom of the screen, click the three vertical dots to the right of **'Delete'** and select **'Refresh'** from the dropdown to force an update.

Note: **'Delete'** on the command bar is an option to discard the entire addendum until it's posted.

- When all documents have been uploaded, click **'Post Addendum'**. On the subsequent **'Post Addenda Confirmation'** screen, click **'OK'** to make the addendum public.

Example RFP for Services Addendum

Save Post Addendum Upload Document Save & Close Delete Share

Example RFP for Services Addendum - Saved

Solicitation Addendum

00-RFP123456 Example RFP for Services Active

Solicitation Number Solicitation Status Reason Owner

General

Name * Example RFP for Services Addendum

Addendum / Change * Addendum #1: Answers to vendor questions posted.

Description

- An **'Addenda'** tab will display listing all addenda created by the PU with a number appended behind each addenda indicating how many have been posted.

Note: Changes to solicitations via addenda will be included in the nightly Bid Notification email to send to vendors registered for the commodity code on the solicitation.

Example RFP for Services - Saved

Solicitation

General Documents Addenda Bids Related

Solicitation Addenda

Created On ↓ Status Reas... ↓ Name ↓ Addendum/Change Description ↓

6/15/2023 3:22 ...	Posted	Example RFP for Services Addendum - 1	Answers to vendor questions
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VI. Cancelling a Posted Solicitation

If a Procurement User (PU) needs to cancel an **'Open'** solicitation for any reason, they can do so by creating and addendum and setting the **'Cancel Solicitation'** field to **'Yes.'**

1. From an **'Open'** solicitation, click the **'Addendum'** button on the command bar.

Example RFP for Services - Saved

Solicitation RFP123456 Open

General Documents Bids Related

Project Title * Example RFP for Services

Description * Example solicitation for Services

Click 'Addendum' on the command bar.

2. A **'New Solicitation Addendum'** popup will display. Switch the **'Cancel Solicitation'** field to **'Yes.'** Several fields will disappear from the screen and the **'Cancel Date'** field will automatically update to today's date. Populate the **'Cancellation Reason'** field and click **'Save.'**

Example IFB For Goods Addendum - Saved

Solicitation Addendum

00-IFB12345 Example IFB For Goods Active

Solicitation Number Solicitation Status Reason Owner

General

Name * Example IFB For Goods Addendum

Cancellation Reason * Cancelling Solicitation

Cancel Solicitation Yes

Cancel Date 4/28/2023

Switch the 'Cancel Solicitation' button to 'Yes' and provide a 'Cancellation Reason.'

3. The addendum will be saved and **'Post Addendum'** and **'Upload Document'** buttons will appear on the command bar. Add an attachment if necessary, then click **'Post Addendum'** to finalize the cancellation. The **'Confirm Cancellation'** popup will appear asking the PU to confirm that they want to cancel the solicitation. If so, click **'OK'** and note this action cannot be undone.

Example IFB For Goods Addendum - Saved

Example IFB For Goods Active Jeff Singer

Confirm Cancellation

Please confirm that you would like to cancel this Solicitation. The cancellation will become visible to Vendors via the Portal and this form will become read-only. This cannot be undone.

OK Cancel

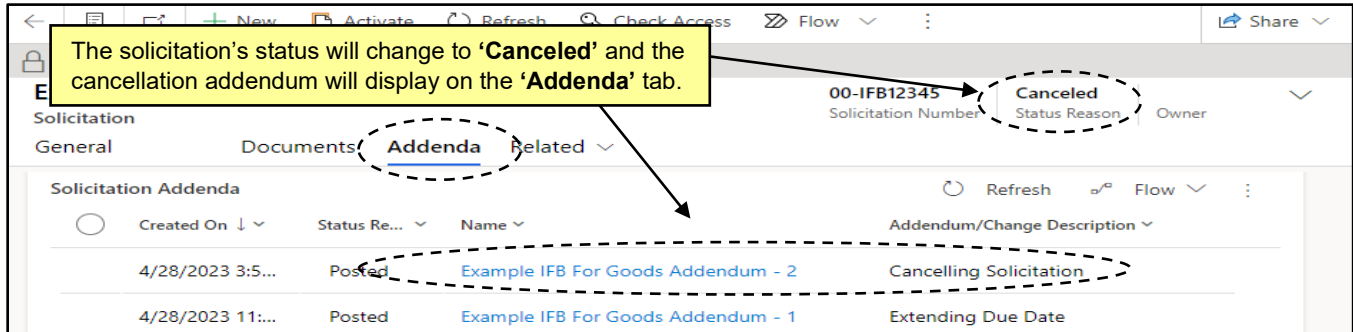
Click 'OK' to confirm the cancellation. This action cannot be undone.

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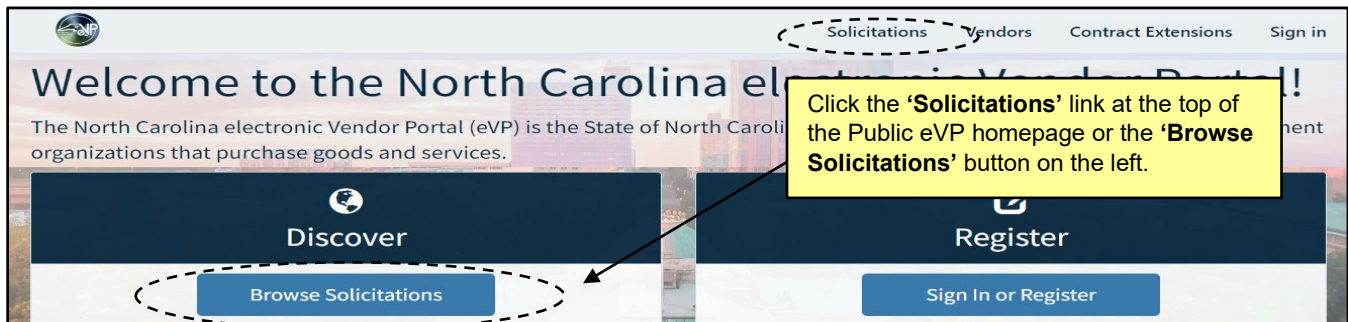
- The solicitation will switch to a **'Canceled'** status, it will no longer be visible in the **'Active Solicitations'** section of the PUs solicitations, and the cancellation will be recorded on the solicitation's **'Addenda'** tab.



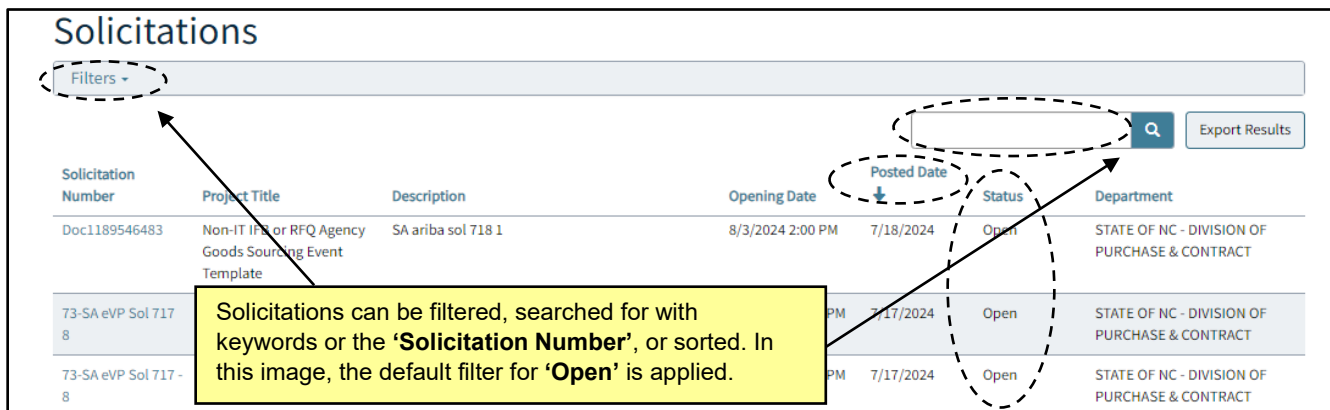
VII. Viewing a Posted Solicitation on the Public eVP

All posted solicitations will be visible to the public on the Public eVP. To verify the public version of a new solicitation appears correctly, navigate to the Public eVP.

- From the Public eVP, click on either the **'Solicitations'** link at the top of the screen or on the **'Browse Solicitations'** button.



- The public **'Solicitations'** page will display. By default, only solicitations in **'Open'** Status will display and will be sorted with the most recent **'Posted Date'** at the top. Clicking on any of the column headers will sort by that column. To see solicitations in other statuses, click on **'Filters,'** choose a different option beneath **'Solicitation Status,'** and click **'Apply'**. Paste the **'Solicitation Number'** in the search bar to find that specific solicitation.





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3. Click on the **'Solicitation Number'** of the solicitation of interest. On the subsequent solicitation details page, basic information regarding the solicitation will display above the attachments included by the PU. If an addendum has been posted, it will display beneath the attachments. It may be necessary to scroll down to see the entirety of the posting.

Note: Ignore the warning message alerting vendors to log in to respond to the solicitation.

Home / Solicitations / Example RFP for Services

Example RFP for Services

Please log in. Only Vendors registered with the State of North Carolina's Electronic Vendor Portal can respond to this type of Solicitation. Please sign in to respond to this Solicitation.

Respond to Solicitation

Solicitation Number	Department	Status Reason
RFP123456	Admins	Open

Opening Date *	Posted Date	Commodity Code *
7/13/2023 2:00 PM	6/15/2023	

Mandatory Conference/Site Visit
6/22/2023

Description *
Example solicitation for Services

Attachments
about an hour ago

- Completed Solicitation Document.pdf (476.02 KB)

24 minutes ago

- Answers to Vendor Q&A.pdf (153.70 KB)

Addenda

Created On ↑	Name	Addendum/Change Description
6/15/2023 3:22 AM	Example RFP for Services Addendum - 1	Answers to vendor questions

Basic solicitation information will display on this page above any attachments or addenda.

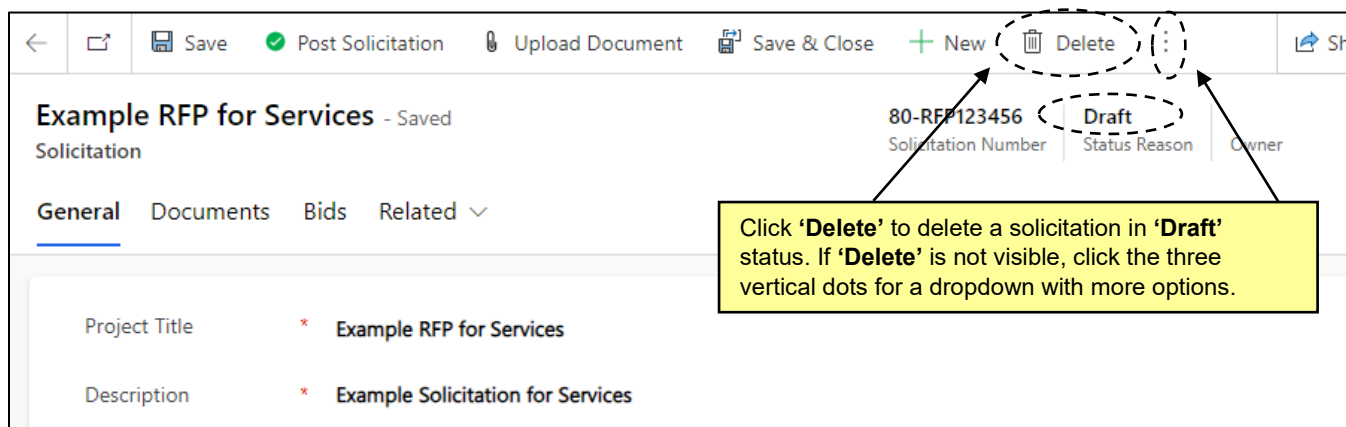


VIII. Deleting a Solicitation in 'Draft' Status

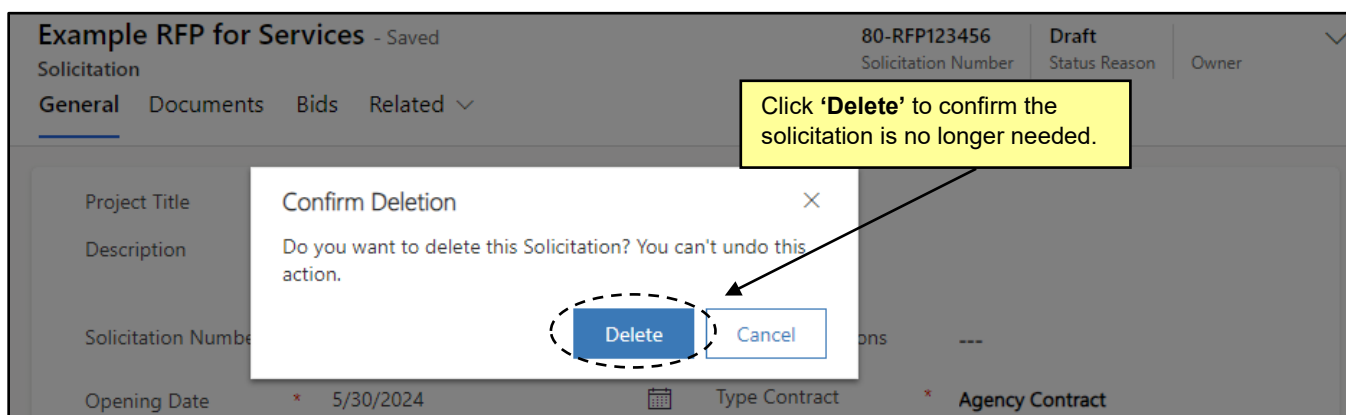
While a solicitation is still in **'Draft'** status, it can be deleted by the State Procurement User (PU). This might be necessary if it is determined that it is not necessary to post the solicitation anymore. Once a solicitation has been posted and is in an **'Open'** or **'Pending Selection'** status, it cannot be deleted, although it can be **'Cancelled'** via an addendum.

1. From the **'General'** tab of a solicitation in **'Draft'** status, click the **'Delete'** button at the top of the screen.

Note: If **'Delete'** is not visible, click the three vertical dots for a dropdown with additional options.



2. On the subsequent **'Confirm Deletion'** screen, click **'Delete'** to finalize the deletion.



3. The **'Draft'** solicitation will no longer exist.