

NC eProcurement

Procurement Exceptions (Non-IT)

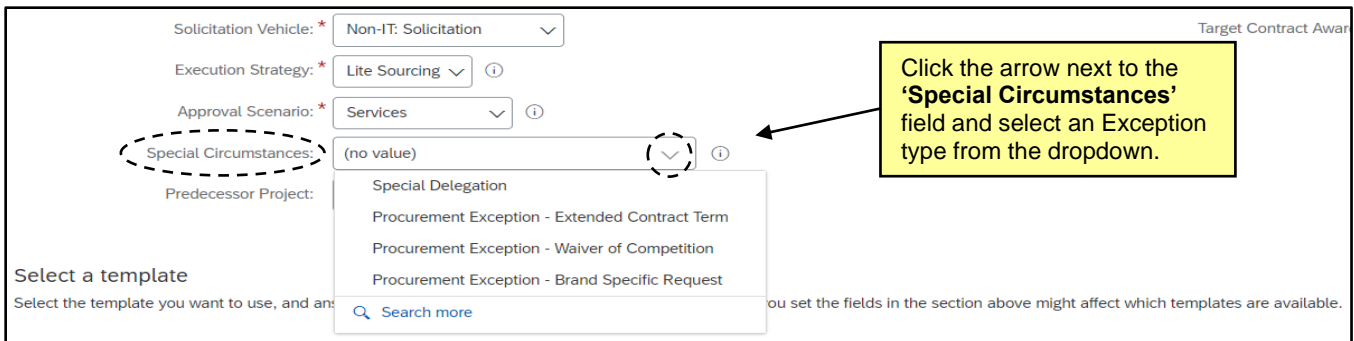
If circumstances arise where a user needs to petition P&C for a Procurement Exception, that request and approval process is built into the Sourcing Project workflow. Users will indicate their intent to request an Exception in the **'Special Circumstances'** field on the **'Create Sourcing Project'** page, which triggers additional tasks and documents to be added to the Sourcing Project.

I. Requesting a Procurement Exception

1. While completing the **'Create Sourcing Project'** page after initiating a Sourcing Project, the user should click the dropdown arrow in the **'Special Circumstances'** field and select any of the Exception types that apply: **'Procurement Exception – Extended Contract Term,' 'Procurement Exception – Waiver of Competition,' 'Procurement Exception – Brand Specific Request,'** or **'Special Delegation.'**

Notes:

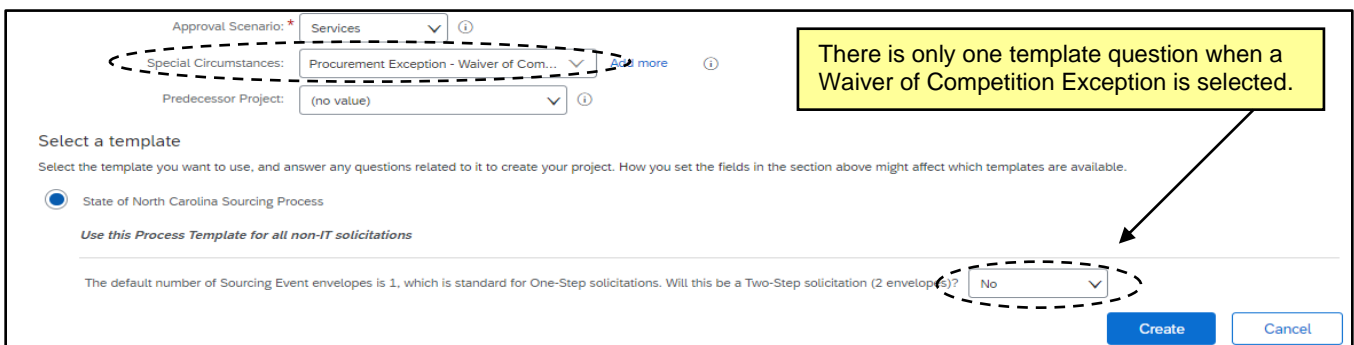
- **'Special Delegation'** eliminates the need for P&C approval.
- If no options display in the dropdown menu immediately, click **'Search more.'**



II. Waiver of Competition Exceptions

Users who select **'Special Circumstance'** of **'Procurement Exception – Waiver of Competition'** will not have to answer the template question regarding the type of solicitation, as an RFQ will be automatically assigned. Users will also see an additional task in **Phase 04** instructing them to **'Populate Waiver of Competition Exception Template.'** Once this is complete, they should replace that template in the **'Solicitation Document'** folder for P&C to review during the **'Gain P&C Approval of Sourcing Event'** task. Because the solicitation will not be posted publicly, the Sourcing Event can be sent directly to the selected vendor.

1. On a Sourcing Project where a Waiver of Competition Exception has been requested, only one template question will display at the bottom of the screen. There is no need to indicate that an RFQ will be created.



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- When the user gets to **Phase 04** on the **'Tasks'** tab, they will see an additional task instructing them to **'Populate Waiver of Competition Exception Template.'** The task is linked to the **'Procurement Exception – Waiver of Competition Template'** in the **'Solicitation Document'** folder.

Task Name	Folder	Owner	Status
03 - DEVELOP SOURCING STRATEGY		Project Owner	Not Started
04 - DEVELOP SOURCING EVENT		Project Owner	Not Started
Populate Solicitation Document Template			
Build Sourcing Event Rules and Content			
Populate Waiver of Competition Exception Template	Solicitation Document	Project Owner	Not Started
Gain P&C Approval of Sourcing Event	Sourcing Event	Project Owner	Not Started
Publish Sourcing Event	Sourcing Event	Project Owner	Not Started
05 - CONDUCT SOURCING EVENT		Project Owner	Not Started

A 'Populate Waiver of Competition Exception Template' task will display in Phase 04.

- Navigate to the **'Documents'** tab, click the blue triangle to the left of the **'Solicitation Document'** folder, click on the **'Procurement Exception – Waiver of Competition Template'** document, and select **'Download'** from the dropdown to download the template.

Name	Action	Owner	Status
Sol...	Download		
Sol...	View Details		
	Edit Attributes		
	Copy		
	Move		
ent Checklist Template		Project Owner	Not Edited
er of Competition Template		Project Owner	Not Edited

Open the 'Solicitation Document' folder and download the 'Procurement Exception – Waiver of Competition Template' document (partially obscured by the dropdown in this image).

- When the template has been filled out, click back into the **'Solicitation Document'** folder and click on the template document again. Select **'Replace Document'** from the dropdown to load a completed version for P&C to consider along with the RFQ document, Procurement Checklist, and Event in the **'Gain P&C Approval of Sourcing Event'** task. P&C will communicate their decision during the Sourcing Event approval process.

Name	Action	Owner	Status
Sol...	Download		
Sol...	View Details		
	Edit Attributes		
	Copy		
	Move		
ent Checklist Template		Project Owner	
er of Competition Template		Project Owner	
Proc...	Replace Document	Project Owner	

Click on the 'Procurement Exception – Waiver of Competition Template' document again (partially obscured by the dropdown in this image) and select 'Replace Document' from the dropdown to attach the completed Exception Request for P&C review.

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- After all approvals have been granted by P&C and the Sourcing Event 'Rules' and 'Content' have been finalized, navigate to **Section 2 (Suppliers)**. The 'Invited Participants' page will display. Click 'Invite Participants'.

- On the subsequent 'Participant Search' page, use the 'Search Filter' to find the approved vendor. Check the box to the left of the search results and click 'OK' to invite that vendor to respond to the RFQ. Clicking the '+' button will add additional search fields.

Note: Only vendors actively registered in the NC electronic Vendor Portal (eVP) can be selected.

- Invited vendors will display on the 'Invited Participants' page. If more than one vendor has been approved to participate in the private RFQ, click 'Invite Another Participant' as many times as is necessary to include all approved vendors.

III. Extended Contract Term Exceptions

Users who select a ‘Special Circumstance’ of ‘Procurement Exception – Extended Contract Term’ will see two additional tasks in **Phase 04** instructing them to ‘Populate Extended Contract Term Exception Template’ and to ‘Gain P&C Approval of Extended Contract Term Exception’ before the Solicitation Document and Event is sent to P&C for review during the ‘Gain P&C Approval of Sourcing Event’ task.

1. On a Sourcing Project where an Extended Contract Term Exception has been requested, a ‘Populate Extended Contract Term Exception Template’ task will display in **Phase 04**. The task is linked to the ‘Extended Contract Term Exception’ folder on the ‘Documents’ tab.

Task Name	Category	Owner	Status
Populate Solicitation Document Template	Solicitation	Project Owner	Not Started
Build Sourcing Event Rules and Content	Sourcing	Project Owner	Not Started
Populate Extended Contract Term Exception Template	Extended Contract Term Exception	Project Owner	Not Started
Gain P&C Approval of Extended Contract Term Exception	Extended Contract Term Exception	Project Owner	Not Started
Gain P&C Approval of Sourcing Event	Sourcing Event	Project Owner	Not Started
Create Supplier Research Posting and Publish Sourcing Event	Sourcing Event	Project Owner	Not Started

A ‘Populate Extended Contract Term Exception Template’ task will display in **Phase 04** when that Exception has been requested.

2. Navigate to the ‘Documents’ tab, click the blue triangle to the left of the ‘Extended Contract Term Exception’ folder, click on the ‘Procurement Exception – Extended Contract Term Template’ document, and select ‘Download’ from the dropdown to download the template. Save the document locally, fill it out, and click back onto the document template when it is complete. Select ‘Replace Document’ from the dropdown to upload a completed version for P&C to consider.

Name	Action	Owner	Status
Extended Contract Term Template	Download	Project Owner	Not Edited

From the ‘Documents’ tab, open the ‘Extended Contract Term Exception’ folder (obscured here), then download, complete, and upload a completed version by selecting ‘Replace Document’ from the dropdown.

- When the template has been replaced, navigate back to the **'Tasks'** tab and click on the **'Gain P&C Approval of Extended Contract Term Exception'** task and select **'View Task Details'** from the dropdown. Specify a **'Due Date,'** add any additional comments, and click **'Submit.'**

Note: The approval flow for this Task will be automated. There is no need to insert a P&C Service Team into the approval flow.

1. Extended Contract Term Exception (Read Only)

2. Specify Due Date

3. Provide an initial message and click Submit or Mark Cancelled

Submit | Mark Cancelled

Properties | Task History | Approval Flow

Submitted | Pending (State Purchasing Officer) | Approved

Set a **'Due Date'** and click **'Submit'** to send the task to P&C for review and approval. The Approval flow for this task is automated based on the estimated value of the contract.

- Once P&C approves the Exception request, the task will automatically update to **'Approved'** status and the user can proceed to the following **'Gain P&C Approval of Sourcing Event'** task.

Populate Extended Contract Term Exception Template	Extended Contract Term Exception	Project Owner	Not Started
Gain P&C Approval of Extended Contract Term Exception	Extended Contract Term Exception	classroomtraining49	Approved 03/30/2023
Gain P&C Approval of Sourcing Event	Sourcing Event	Project Owner	Not Started

IV. Brand Specific Request Exceptions

Users who select a **'Special Circumstance'** of **'Procurement Exception – Brand Specific Request'** will see an additional task in **Phase 04** instructing them to **'Populate Brand Specific Exception Template.'** Once this is complete, they should replace that template in the **'Solicitation Document'** folder for P&C to review during the **'Gain P&C Approval of Sourcing Event'** task.

- On a Sourcing Project where a Brand Specific Request Exception has been requested, a **'Populate Brand Specific Request Exception Template'** task will display in **Phase 04**. The task is linked to a document template in the **'Solicitation Document'** folder.

03 - DEVELOP SOURCING STRATEGY

04 - DEVELOP SOURCING EVENT

Populate Solicitation Document Template

Build Sourcing Event Rules and Content

Populate Brand Specific Request Exception Template

Gain P&C Approval of Sourcing Event

Create Supplier Research Posting and Publish Sourcing Event

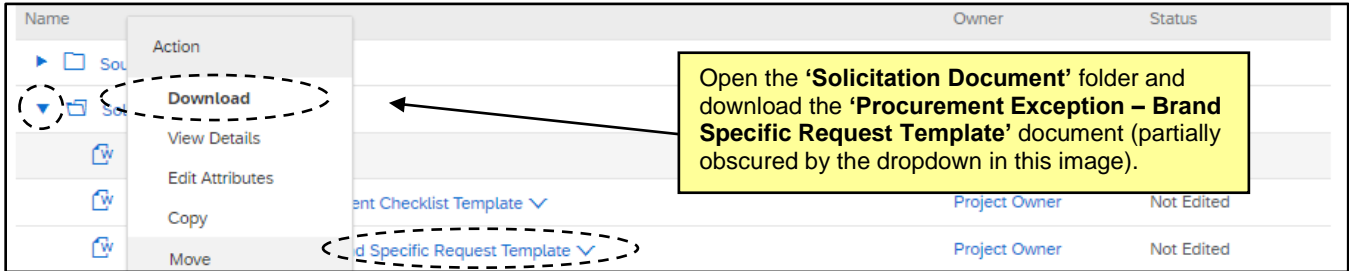
05 - CONDUCT SOURCING EVENT

A **'Populate Brand Specific Request Exception Template'** task will display in **Phase 04** when an Exception has been requested.

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- Navigate to the **'Documents'** tab, click the blue triangle to the left of the **'Solicitation Document'** folder, click on the **'Procurement Exception – Brand Specific Request Template'** document, and select **'Download'** from the dropdown to download the template.



- When the template has been filled out, click back into the **'Solicitation Document'** folder and click on the template document again. Select **'Replace Document'** from the dropdown to load a completed version for P&C to consider along with the Solicitation Document and Event in the **'Gain P&C Approval of Sourcing Event'** task. P&C will communicate their decision during the Sourcing Event approval process.

