Publishing a Sourcing Event (IT)

Introduction

A Sourcing Event is the vendor-facing part of a Sourcing Project. The Sourcing Project Owner can establish the bidding dates and time, as well as compile all information the vendors will need to develop their response, as guided by a template established by NCDIT. Once the Sourcing Event is in a **Published** status, it will be automatically posted to the Public eVP, and interested vendors can click the **Intends to Participate** button to receive an email with a link to respond electronically through their Ariba accounts. Before the Sourcing Event can be Published, the Sourcing Project Owner will have to complete a few Tasks.

Learning **Objectives**

At the end of this job aid, **you will be able to**:

- Understand and navigate the tasks within the Sourcing Project required to create and gain approval of the solicitation documents and Sourcing Event.
- Understand how to initiate a Sourcing Event.
- Understand how to finalize and publish a Sourcing Event.

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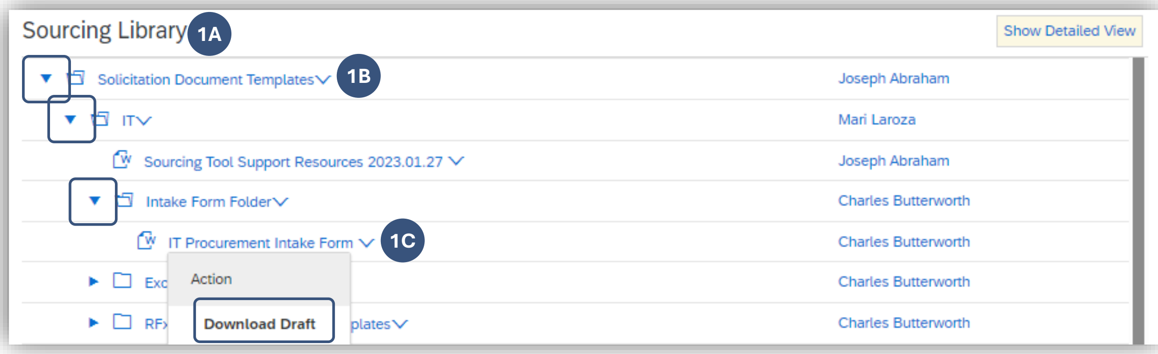
Submit IT Procurement Intake Form to NCDIT Reviewers for Approval

1 The **IT Procurement Intake Form** is generally completed by an Agency Business user and contains summary information about an IT business need. This information will help Agency Procurement and NCDIT collaboratively determine the appropriate sourcing approach to address the IT business need. Sourcing Project Owners will submit the completed **IT Procurement Intake Form** to NCDIT for approval in the first task of **Phase 01**.

A. To kick off a Sourcing Project, Sourcing Project Owners will need to upload a completed **IT Procurement Intake Form** to the **Events and other documents** section. The **IT Procurement Intake Form** is generally completed by Agency Business and may be attached to a Purchase Requisition submitted by Agency Business. To download a blank **IT Procurement Intake Form** to provide to Agency Business, the Sourcing Project Owner will have to access the **Sourcing Library**.

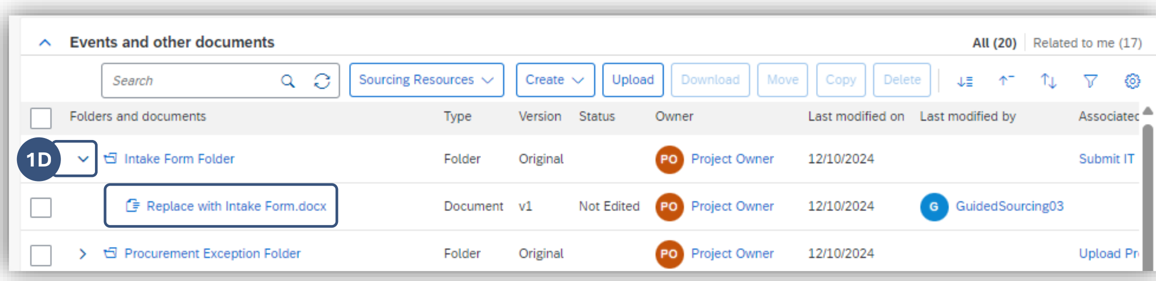
B. From there, open the **Solicitation Document Templates** folder, then the **IT** folder, then the **Intake Form Folder**.

C. Click on the **IT Procurement Intake Form** file and select **Download Draft** from the dropdown.



The **Sourcing Library** can be found by clicking **Manage** in the top right of the Ariba home page

D. When the Agency Business user has provided a completed version of the **IT Procurement Intake Form**, the Sourcing Project Owner will need to upload it to the Sourcing Project. Back in the **Events and other documents** section, click the blue arrow to the left of the **Intake Form Folder**, and click on the **Replace with Intake Form** document to open it up.



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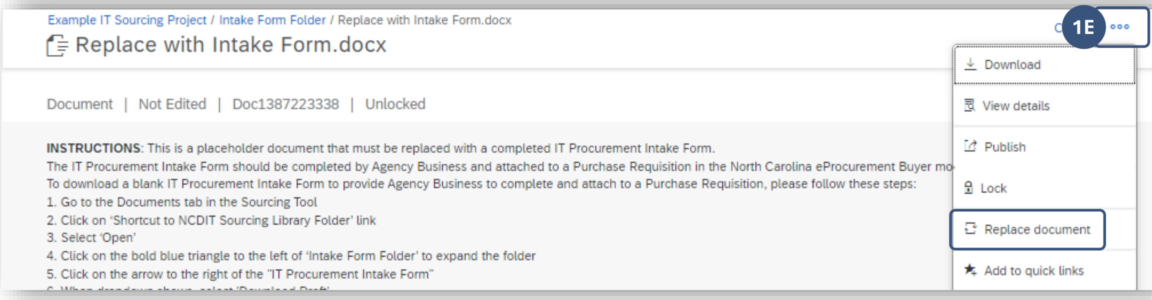
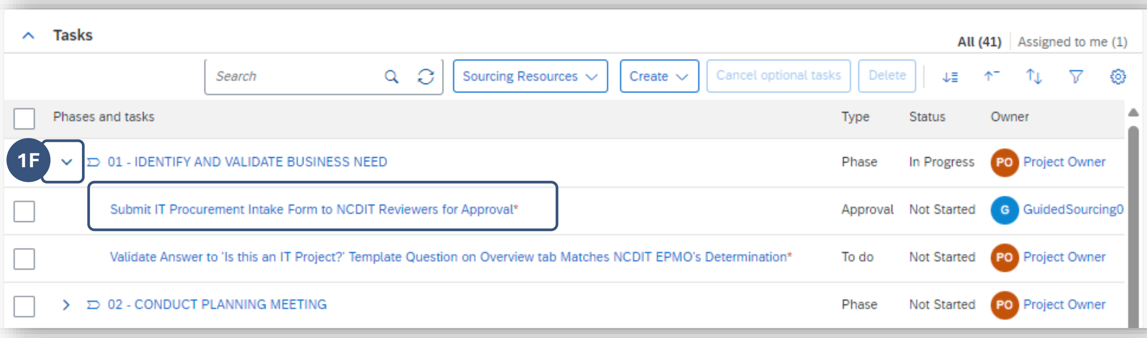
E. Click the three dots in the top right and select **Replace document** from the dropdown. Select the **Upload a new document** option, choose the completed version of the form, then select **Yes** and click **Replace**. The documents status will update from **Not Edited** to **Draft** when replaced.

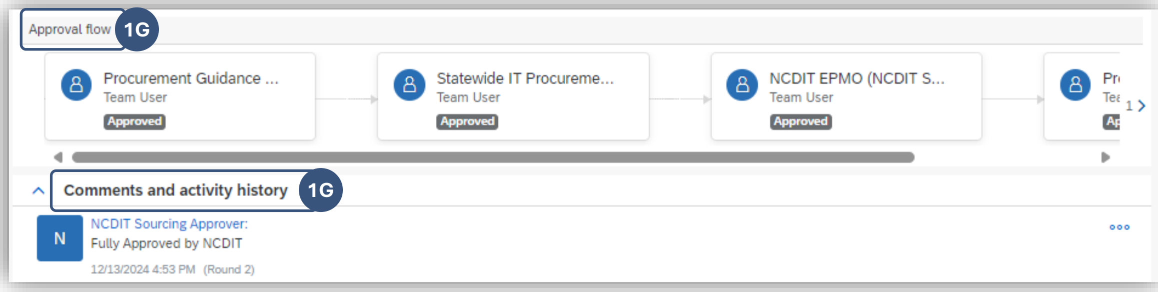


F. Click **Close** in the top right then navigate to the **Tasks** section. Click the blue arrow next to **Phase 01** and either scroll to the right and click **Submit** in the **Action** column (not pictured below) or click on the **Submit IT Procurement Intake Form to NCDIT Reviewers for Approval** task and click **Submit** in the top right of the task. The approval flow and **Due Date** will be pre-populated.

If the **Due Date** needs to be altered, click into the task and click the **Edit** button to do so.



G. When the task has been submitted, its status in the **Tasks** section will automatically update to **In Approval**. To monitor the process of the review, click on the task and scroll down the page. The **Approval flow** portion will show who has or has not approved the task, and the **Comments and activity history** section will provide timestamps for when approvals happened and track any comments provided by the approvers. The status on the **Tasks** section will automatically update to **Approved** when all groups have approved.



Project Owners will be notified via email if an approver adds a comment to the approval, and NCDIT may attach an edited version of the document to a comment.

H. The next task, **Validate Answer to Is this an IT Project? Template Question on Overview tab Matches NCDIT EPMOs Determination**, asks the Sourcing Project Owner to confirm that the Sourcing Project is flagged correctly regarding its status as an IT Project as determined by NCDIT EPMO. If the feedback provided by NCDIT EPMO from the previous approval task requires the Sourcing Project Owner to update the template question related to if the Sourcing Project is for an IT Project, the Sourcing Project Owner should adjust this by navigating to the **Project Summary** section, clicking **Edit**, and scrolling down to the **Template questions** to change the answer to the first question as needed, then click **Save**. This task will have automatically updated to In Progress once the previous task was fully approved. To close this task, click **Set to Complete**.

Populate Solicitation Document and Initiate Sourcing Event

2 The Sourcing Project Owner should next review and complete the two tasks in **Phase 02** if the Agency determines a Planning Meeting with NCDIT would be beneficial.

A. If it is determined that it is necessary to schedule a Procurement Planning Meeting with NCDIT, the first Task in **Phase 02** provides guidance for doing so. The Sourcing Project Owner can click on the task and follow the instructions listed in the **Task details** section.

B. Once the Planning Meeting has been conducted, the Sourcing Project Owner should update Table 2 at the bottom of the already created **IT Procurement Intake Form** and save it in the **Events and other documents** section of the Sourcing Project (replace initial document).

C. The Sourcing Project Owner can then update the two tasks in **Phase 02** to either as **Set to complete** or **Cancel task**.

Once **Phase 02** is completed or determined to not be needed for a Sourcing Project, the Sourcing Project Owner can proceed to **Phase 03** to populate the Solicitation Document and initiate the Sourcing Event. The Sourcing Event is the interactive part of the Sourcing Project where vendors can provide their responses. Prior to sending the Sourcing Event to the Agency CIO and NCDIT for approval, Sourcing Project Owners will only adjust the **Event duration** (Due Date) and **Questions, requirements, and attachments** (Content) sections before saving. The information included in the Solicitation Document is complementary to that in the Content section of the Sourcing Event.

D. Navigate to the **IT** section of the **Sourcing Library** and click the blue triangle next to the **RFx Solicitation Document Templates** folder. Click on the template document that matches the type of solicitation being posted and select **Download Draft** from the dropdown, populate the template, and save a local copy.

E. Back in the **Events and other documents** section click the blue triangle to the left of the **Solicitation Document and Sourcing Event Folder**, then click into the **Replace with Draft IT Solicitation Document.docx** document. Click the three dots in the top right and select **Replace document** from the dropdown to add the completed version of the Solicitation Document and upload any other documents that NCDIT may need to review.

To find the **Doc ID#** of the Sourcing Event before editing it in order to add the Solicitation Number to the Solicitation Documents, click the three dots in the **Actions** column on the far right of the Event template row and select **View details** from the dropdown. The **Doc ID#** is also visible in the **Document Id** column, but be aware that it will also display for other documents besides the Sourcing Event, so caution must be taken to note the correct ID #.

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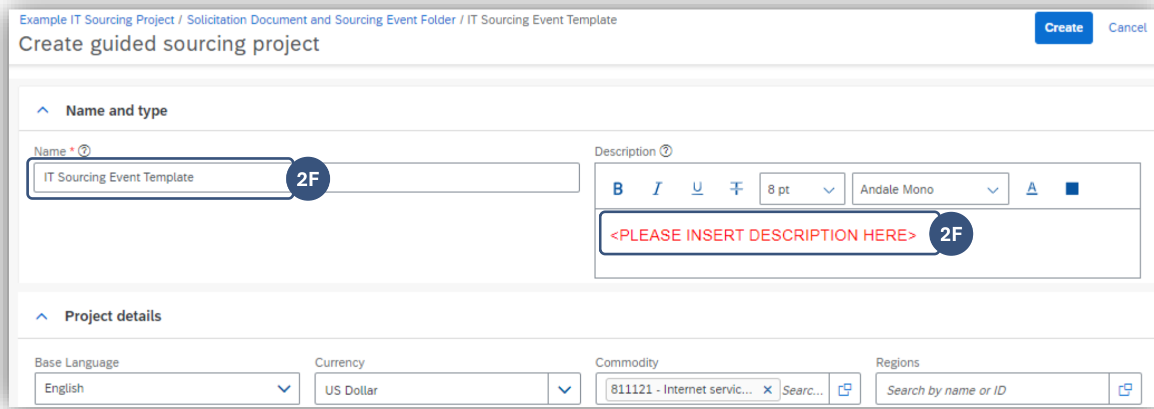
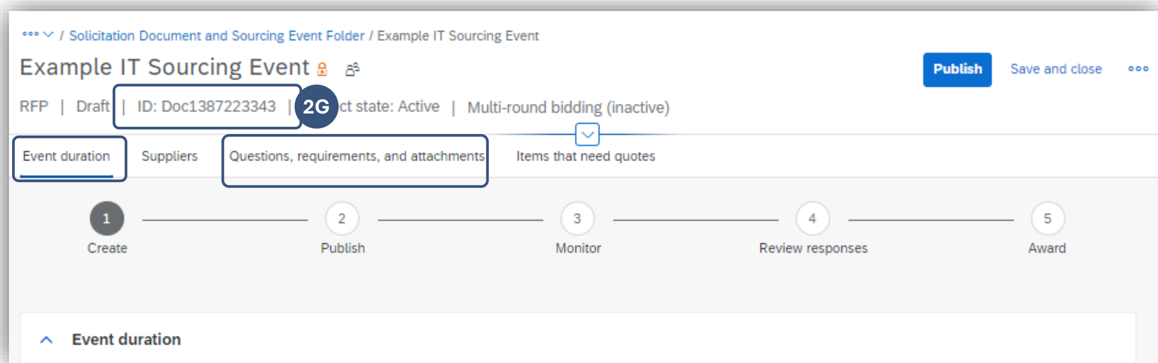
F. In the same **Solicitation Document and Sourcing Event Folder**, click on the **IT Sourcing Event Template** to initiate the Sourcing Event. The **Create guided sourcing project** page will display. It is important to populate the **Name** and **Description** with pertinent information, keeping in mind that both will be visible to vendors and will also populate on the Public eVP record of the solicitation. All other fields can be left as defaulted, and **Commodity** and **Departments** will be pre-populated based on selections made when creating the Sourcing Project. Then click **Create**.



G. The Sourcing Event page will display with a system generated **Doc ID#** below the **Name**. This **Doc ID#** will also automatically be assigned as the **Solicitation Number** in eVP and should also be included in the Solicitation Document. The Sourcing Event will consist of four sections: **Event duration**; **Suppliers**; **Questions, requirements, and attachments**; and **Items that need quotes**, and there will be a timeline above the sections.



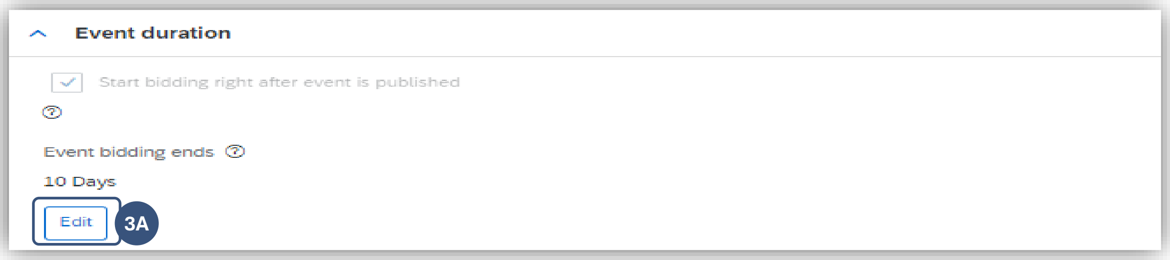
Sourcing Project Owners will only adjust the Event duration (Due Date) and Questions, requirements, and attachments (Content) sections before saving to send to the Agency CIO and NCDIT for approval.

Publishing a Sourcing Event (IT)

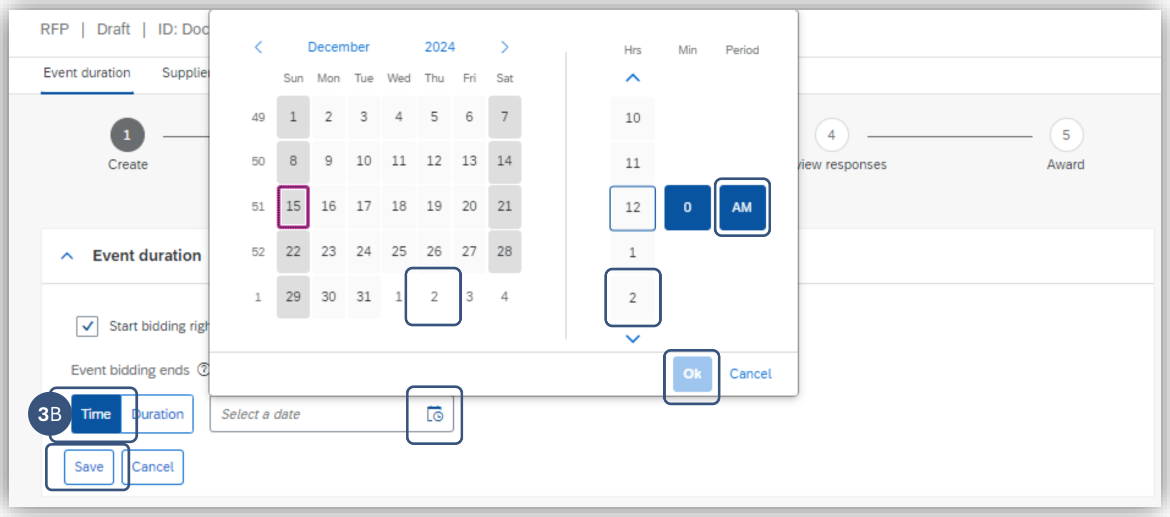
Setting the Event duration (Due date)

3 The first of the two sections to edit is the **Event duration**. This is where the Sourcing Project Owner will establish the **Due date** outlining when bidding ends.

A. Click **Edit** in the **Event duration** section. The default duration is 10 days, but it is important to set this date further out into the future to end on a specific date and time.



B. Click the **Time** button then click the date picker to set a specific **Due date** and time for when the bidding ends. This date should match the date included in the Solicitation Document and can be adjusted later if the date needs to shift before publishing. This date must be at least three days in the future and cannot be on a state of North Carolina holiday. If a conflicting date is selected, the eVP system will send an email notifying the user that a new **Due Date** must be selected before it can be posted on eVP. Once a Due date and time have been selected, click **OK** then **Save**.



On the date picker popup, click on the calendar date to set the **Due date**, and from the time picker, select the hour for the Event to close and click the **AM** button to change to **PM**.

Leave the default **Start bidding right after event is published** box checked.

Publishing a Sourcing Event (IT)

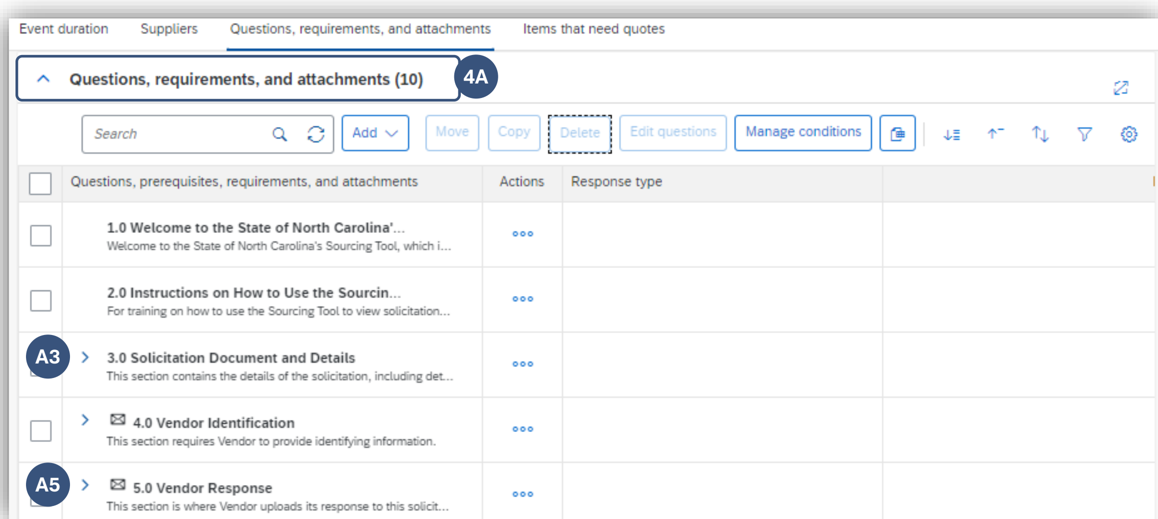
Updating the Questions, requirements, and attachments (Content)

4 The **Questions, requirements, and attachments**, or **Content** section of the Sourcing Event is where the Sourcing Project Owner can share all information about the products or services they wish to receive bids on, and it serves as the framework for vendors to provide a response. NCDIT has created a template in this section that complements the default structure of the various RFx Solicitation Document templates available in the Sourcing Library.

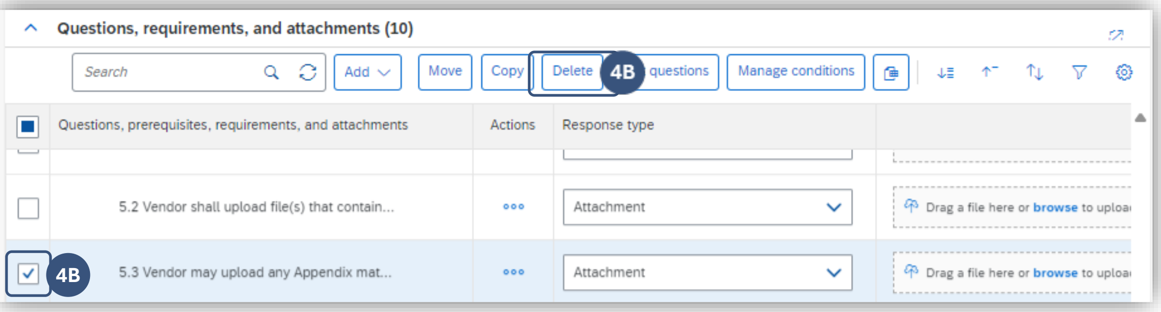
A. The **Questions, requirements, and attachments**, or **Content** section is divided into five numerical sections, most of which have subsections.

1. **Welcome to the State of North Carolina's Sourcing Tool**: A brief welcome message to vendors.
2. **Instructions on How to Use the Sourcing Tool**: Instructions and tips for vendors on how to provide a response within the tool.
3. **Solicitation Document and Details**: Sourcing Project Owners will upload their completed Solicitation Document in subsection **3.1**. Vendors will find instructions for submitting questions in subsection **3.2** as well as a **Vendor Question Submission Template**. If an Addendum is required, the Sourcing Project Owner will post it here and it will become subsection **3.3**.
4. **Vendor Information**: This section requires vendors provide their **Customer Number** from their NC eVP account.
5. **Vendor Response**: This section contains several subsections instructing the vendor to return various completed documents – some required and some optional – depending on the nature of their response.

In subsection **5.1** vendors will return a completed version of the Solicitation Document they downloaded in subsection **3.1**. The returned version of this document will include an **Execution** section to capture the vendor's signature. This section can be countersigned by the agency and is intended to be used as Contract Documentation for the winning bid at the conclusion of the Solicitation process. The Solicitation Document will not be added to the Sourcing Event until it returns from NCDIT with approval.

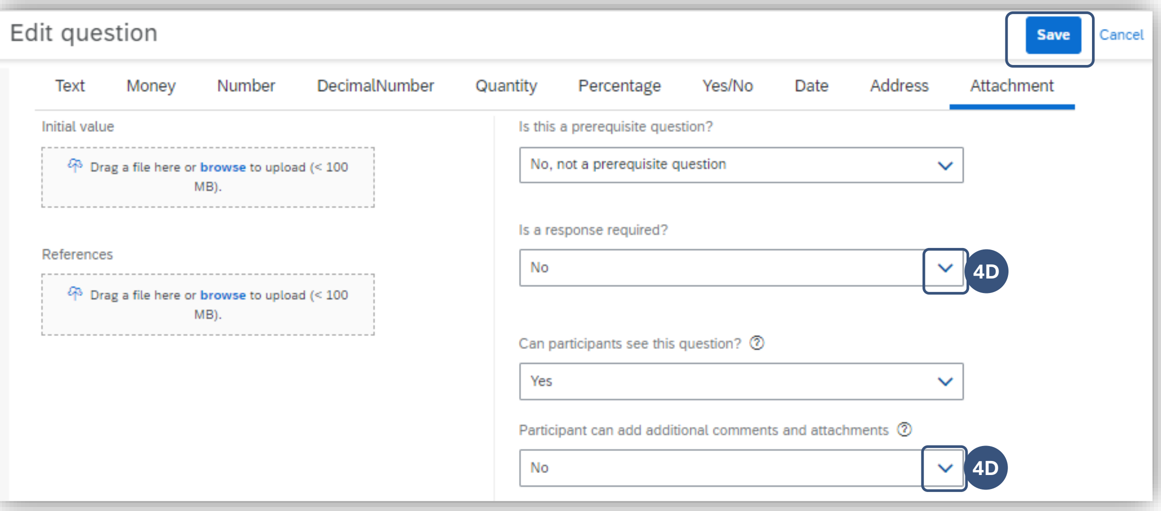


B. Click the right arrow next to **5.0 Vendor Response** to expand it. This section is populated with several subsections instructing vendors to submit their bid response via various attachments. The first two attachment subsections are required for vendors to complete by default. There is no action necessary for Sourcing Project Owners in this section unless any changes to the default content are necessary. Subsections can be added, edited, or deleted. To delete a subsection, check the box to its left and click the **Delete** button at the top of the section. That subsection will be removed (it cannot be undeleted), and the subsection numbering below it will automatically adjust.

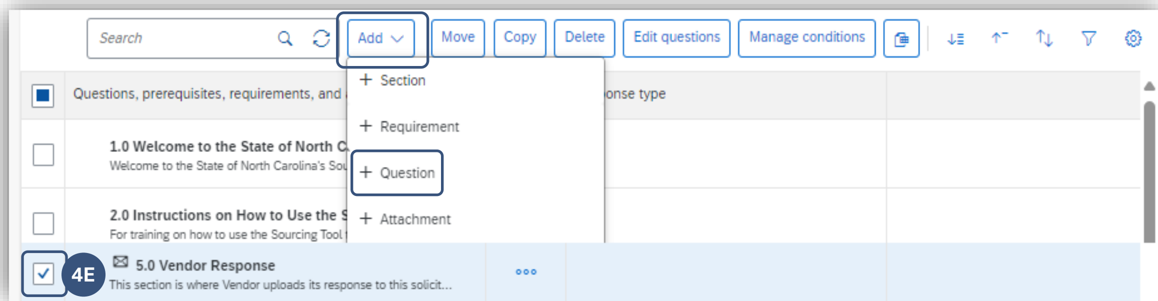


C. To edit a subsection, check the box to its left and click three dots to its right and select **Edit question** from the pop up.

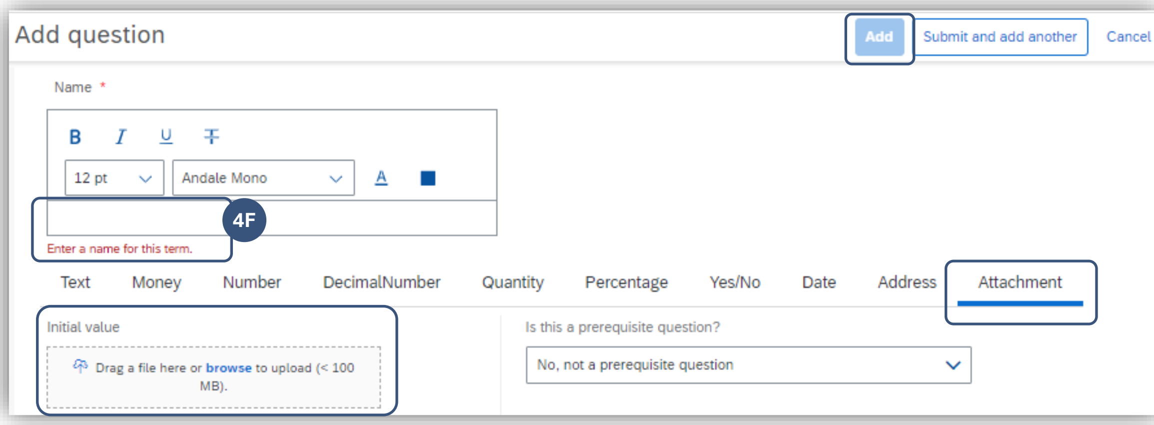
D. The **Edit question** page will display, although it is advised that no edits be made to default subsections. Two potential fields to change are the **Is a response required?** field and the **Participant can add additional comments and attachments** field. If the Sourcing Project Owner would like to change the defaults, they can do so then click **Save**.



E. To add a subsection, check the box next to **5.0 Vendor Response** and click **Add** at the top of the section**.** If the addition is only informational text, select **Requirement**. If the addition is an informational attachment, select **Attachment**. If the Project Owner wants the vendor to return a response as part of the new subsection, select **Question** from the dropdown.

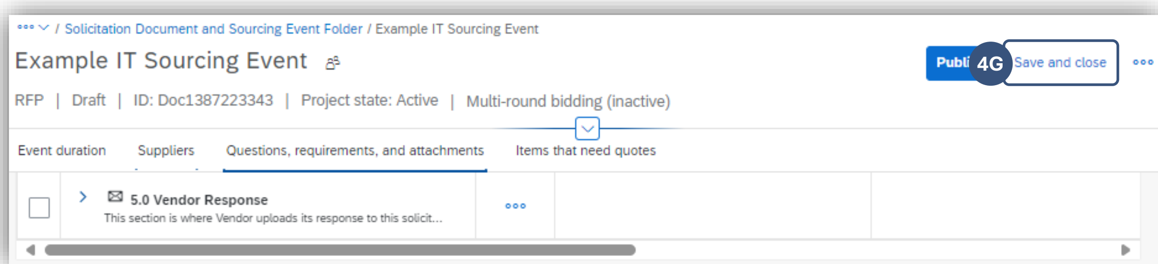


F. Click on **See all options** on the subsequent pop up. On the next page, enter a **Name** for the new subsection and set any other options. If the Project Owner selected a question and wants the vendor to return a document, select **Attachment** as the **Response type** and add an **Initial value** document for them to download and return. Click **Add** to finalize the addition. The new subsection will automatically be added to the bottom of section 5.



G. Once all **Content** is set in the **Questions, requirements, and attachments** section, click the **Save and close** in the top right to save the Sourcing Event to save the edits and return to the Sourcing Project. At this point the **Upload Draft Solicitation Document and Complete Sourcing Event Duration and Content Sections** task can be **Set to complete**.

There is no need to do anything in the **Suppliers** or **Items that need quotes** sections.

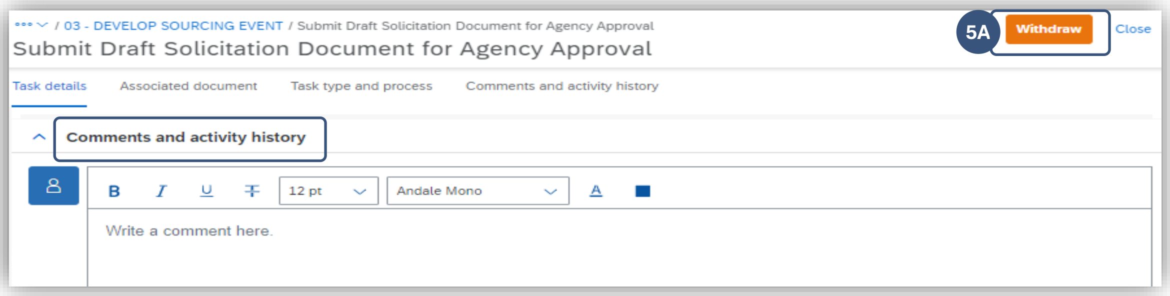


Publishing a Sourcing Event (IT)

Submit Draft Solicitation Document for Agency Approval

5 Before sending the Solicitation Document and Sourcing Event to NCDIT for approval, the documents must first be approved by the **Agency CIO** group in **Phase 03**. If no users were automatically added to this group, at least one user must be added manually by the Sourcing Project Owner via the **Team** section. Once the previous **Upload Draft Solicitation Document and Complete Sourcing Event Duration and Content Sections** task has been **Set to complete**, this task will automatically submit itself.

A. In the **Tasks** section, click on the **Submit Draft Solicitation Document for Agency Approval** task to view its progress. The **Comments and activity history** section will track any comments from the approvers. If the task needs to adjusted in any way, click the **Withdraw** button in the top right. The status of the task will automatically update to **Approved** when the **Agency CIO** approves.



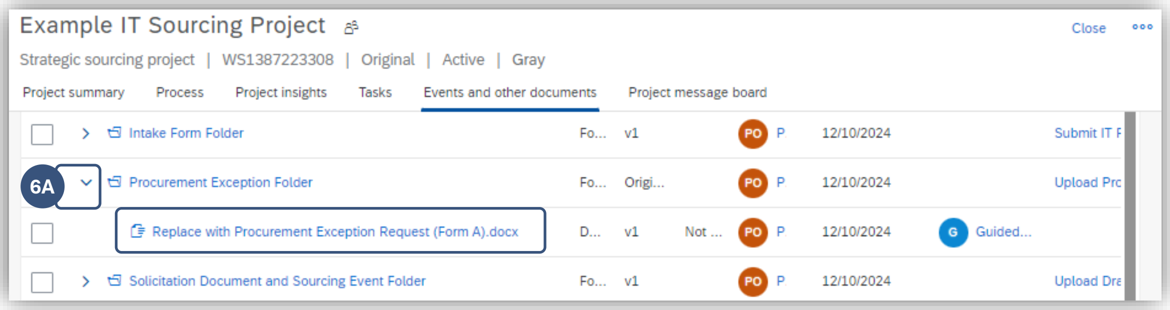
Upload Procurement Exception Request to Procurement Exception Folder (if applicable)

6 After receiving approval from the **Agency CIO**, the Sourcing Project Owner should consider if the solicitation requires a **Procurement Exception Request (Form A)**. If so, the Sourcing Project Owner will need to work with the applicable Agency Business user to complete and upload a **Procurement Exception Request (Form A)** that NCDIT will consider in conjunction with sending the draft IT Solicitation Document and Sourcing Event for approval. If no Procurement Exception is required, the Sourcing Project Owner can skip this task.

A. Navigate to the **IT section** of the **Sourcing Library** and click the blue triangle next to the **Exceptions Folder**. Click on the **Exception Form A** document and select **Download Draft** from the dropdown to save a local copy.

B. When the Sourcing Project Owner has worked with the applicable Agency Business user to complete the **Procurement Exception Request (Form A)**, the Sourcing Project Owner can upload the form to the **Procurement Exception Folder** in the **Events and other documents section** by replacing the **Replace with Procurement Exception Request (Form A)** document in the same manner as done with the Draft IT Solicitation Document in **step 2E** from this guide.

C. Mark the task **Complete** if it is executed or **Cancelled** if it is skipped.

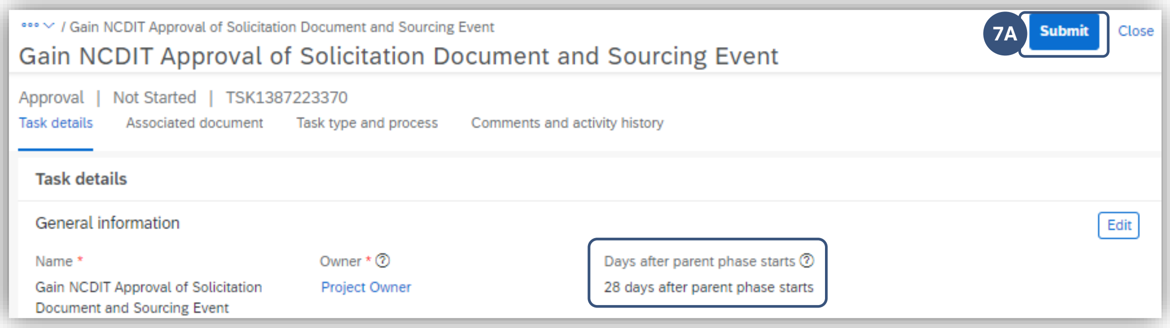


Publishing a Sourcing Event (IT)

Gain NCDIT Approval of Solicitation Document and Sourcing Event

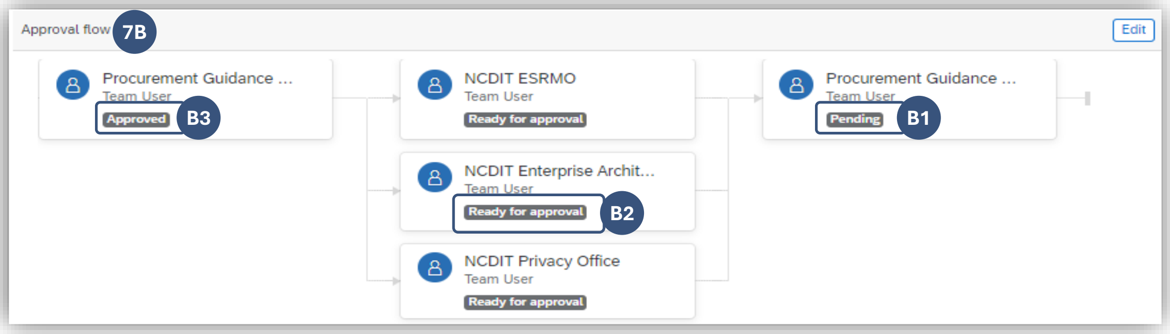
7 When both tasks are complete in **Phase 03**, the Sourcing Project Owner can proceed to **Phase 04** to submit the Solicitation Document and Sourcing Event for approval by NCDIT. Unless **Agency CIO** suggested any updates during **Phase 03**, the documents should be ready for approval.

A. In the **Tasks** section, click on the **Gain NCDIT Approval of Solicitation Document and Sourcing Event** task. On the subsequent page, the approval flow and **Due date** will be set automatically. The **Due date** will be listed as **Days after parent phase starts** and the countdown of days began once **Phase 03** was completed and **Phase 04** began. Click **Submit** in the top right to send the approval request to NCDIT.



B. When the task has been submitted, its status will automatically update to **In Approval**. To monitor the process of the approval, click into it the from the **Tasks** section. Look for any comments by a NCDIT approval group in the **Comments and activity history section**. To see which approval groups are included in the approval workflow, scroll to the **Approval flow** section.

1. An approval group that has not been sent the approval task will be displayed in the **Approval flow** section as **Pending**. These groups have yet to receive the approval request and will not become **Ready for approval** until the approval task is submitted by the Sourcing Project Owner and any previous approval node completes their approval.
2. An approval group that is currently in the process of approving the task will be displayed in the **Approval flow** section as **Ready for approval**.
3. An approval group that has completed its approval will be displayed in the **Approval flow** section as **Approved**.

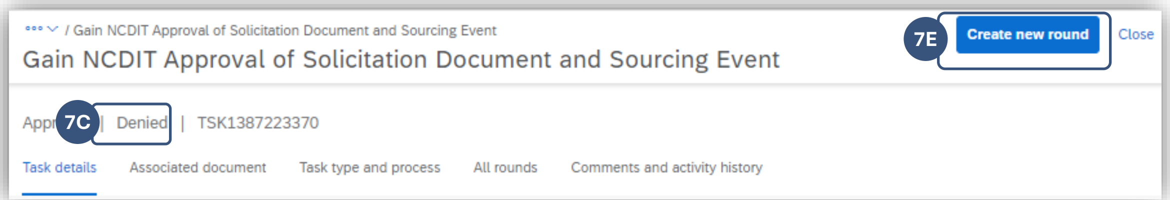


Project Owners will be notified via email if an approver adds a comment to the approval, and NCDIT may attach an edited version of the Solicitation Document to a comment.

C. If NCDIT denies the approval request, the Sourcing Project Owner should work with applicable Agency staff to address NCDIT's feedback and develop an updated Solicitation Document.

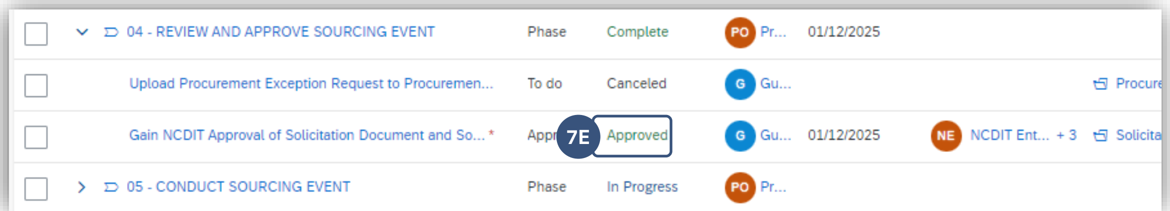
D. The Sourcing Project Owner should return to the **Events and other documents** section and replace the Solicitation Document draft with the updated version.

E. The Sourcing Project Owner should then go back to the **Gain NCDIT Approval of Solicitation Document and Sourcing Event** task and click **Create new round**.



F. The task will update to a subsequent round. Add a comment if necessary and click **Submit** to request a new round of approvals.

E. After NCDIT reviews and fully approves the Solicitation Document and Sourcing Event, the task will automatically update to **Approved** status in the **Tasks** section.



Review Event Duration and Finalize the Sourcing Event Content

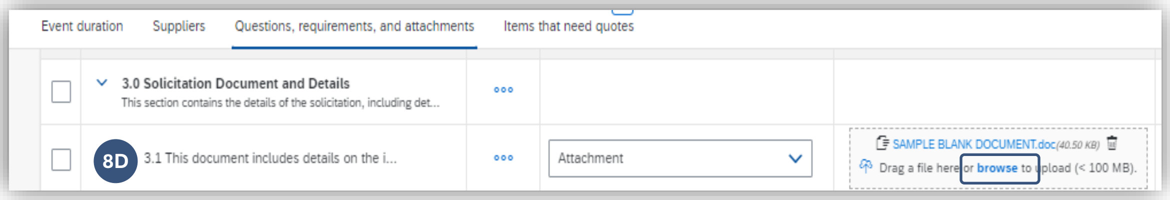
8 After receiving approval from NCDIT to post the solicitation, the Sourcing Project Owner should finalize their Solicitation Document, return to the Sourcing Event to update any dates that may have changed during the approval process, then go to the **Questions, requirements, and attachments** (Content) 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 **Events and other documents** 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** (Content) section to add the finalized version of the Solicitation Document in subsection **3.1** and make any other necessary adjustments.

D. Scroll right to the **Initial Value** column for subsection **3.1** and click on **browse** to replace the **SAMPLE BLANK DOCUMENT** with the completed Solicitation Document.



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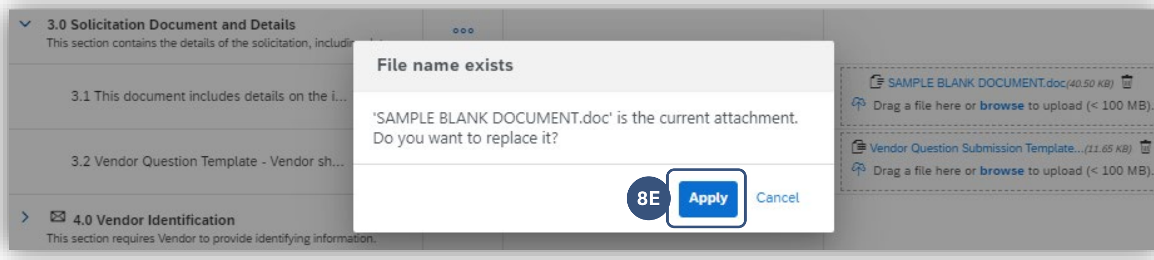
E. Select a local copy of the completed Solicitation Document and on the subsequent **File name exists** popup, click **Apply** to replace the **SAMPLE BLANK DOCUMENT.**

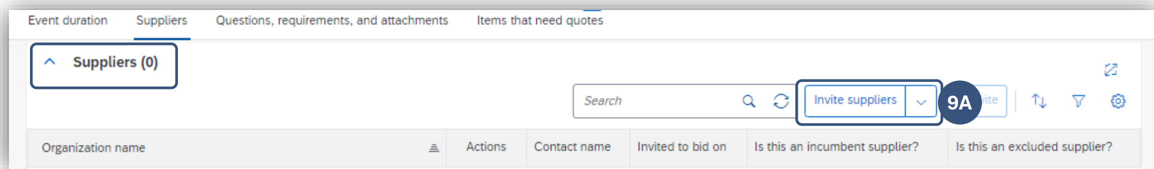


F. There is no action necessary in section **4.0 Vendor Identification**. If no updates are necessary in section **5.0 Vendor Response**, the Sourcing Project Owner can click **Publish** and skip to **section 10** of this guide.

Invite Suppliers to a Private SOW or RFQ if Necessary

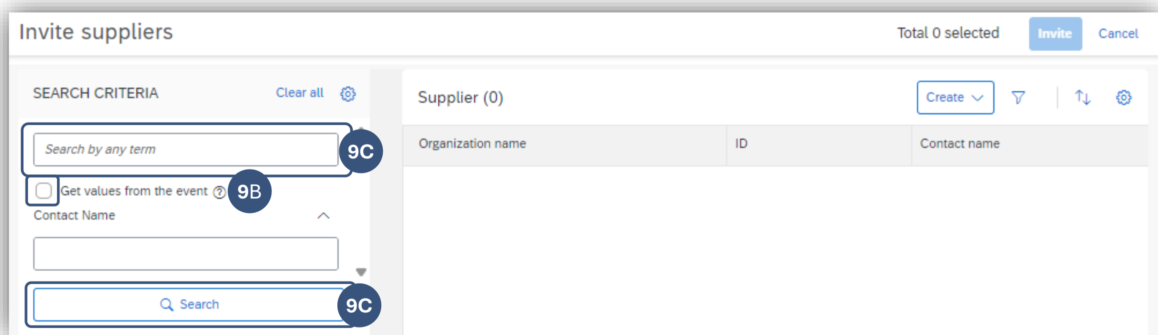
9 If the Sourcing Project Owner selected a **Solicitation Vehicle** of **IT: RFQ** or **IT: SOW** to conduct a private solicitation with a limited set of vendors, they will directly invite the identified vendor(s). The solicitation will not post to Public eVP, and only the directly invited vendor(s) will be able to respond.

A. Navigate to the **Suppliers** section and click the **Invite suppliers** button.

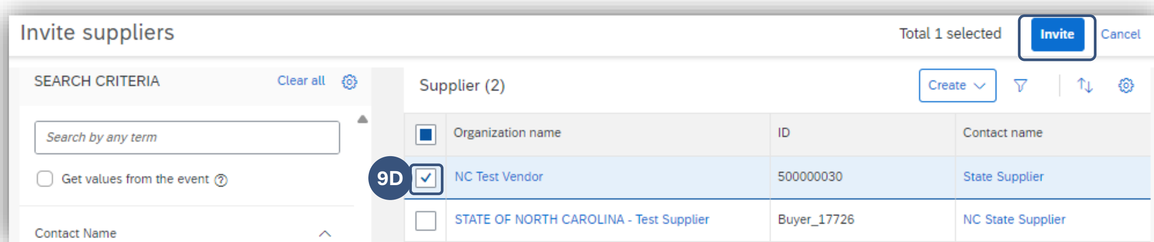


B. On the subsequent **Invite suppliers** page, uncheck the box next to **Get values from the event.**

C. Enter the search criteria to find the identified supplier and click **Search.**



D. Check the box to the left of the identified supplier and click **Invite.**

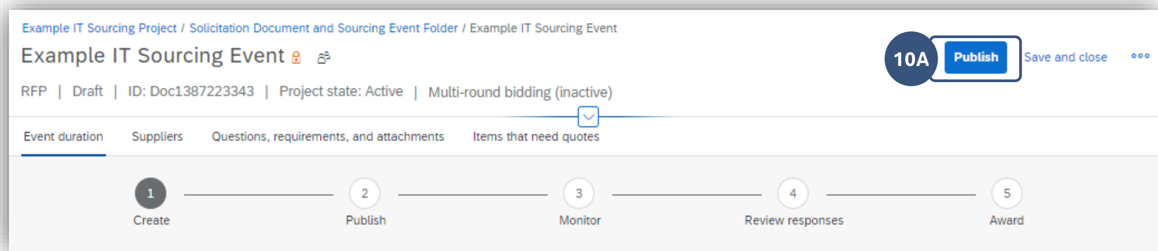


E. If more than one vendor has been approved to participate in the private solicitation, click the **Invite suppliers** again and repeat the process outlined in **steps 9B – D** as many times as is necessary to include all approved vendors. The Sourcing Event will not post to Public eVP, and only the vendor(s) added to **Suppliers** tab will receive an email with a link to respond to the Sourcing Event.

Publish the Sourcing Event

10 When all sections have been finalized, the Sourcing Project Owner can **Publish** the Sourcing Event to send it to Public eVP so that vendors can begin to respond.

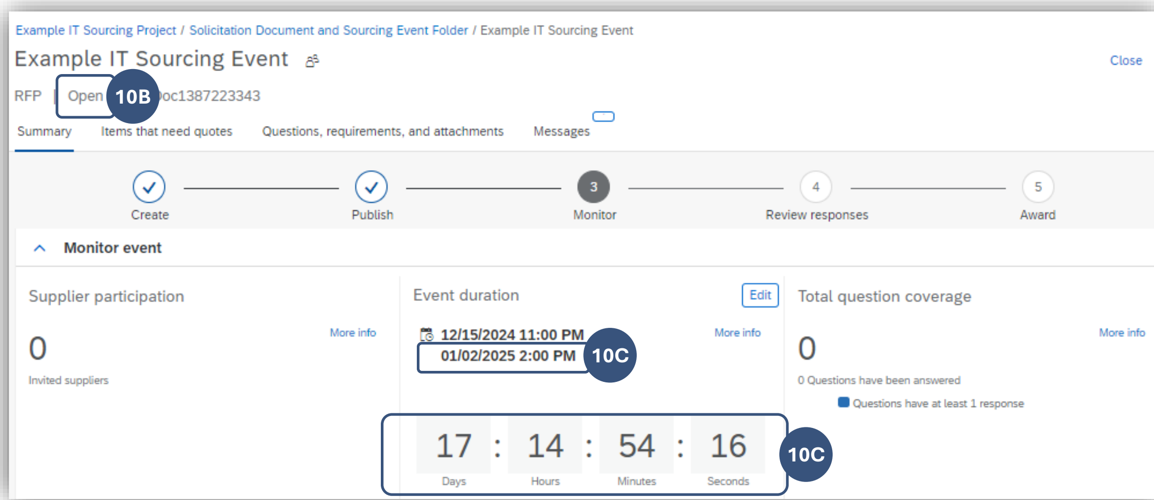
A. Click **Publish** in the top right of the Sourcing Event.



B. Click **Monitor event** on the popup to verify the Sourcing Event is published as expected.

C. Verify the status is **Open** at the top of the screen.

D. Verify the countdown clock is operational and the **Due date** is correct.



E. 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 Sourcing Project Owner 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].

F. Navigate back to the Sourcing Project **Tasks** section and **Set to complete** the **Publish Sourcing Event task** in **Phase 05**.