

NC eProcurement

Publishing a Sourcing Event (IT)

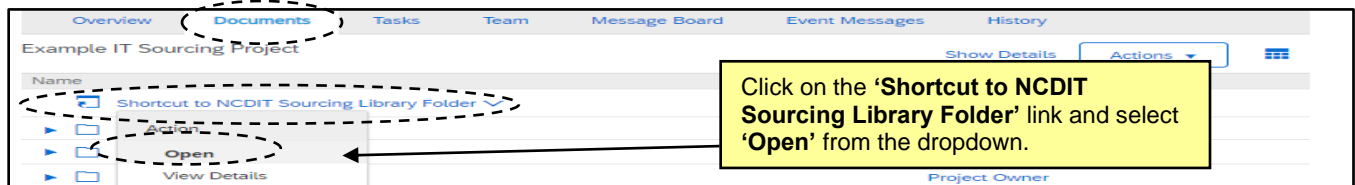
STATE DEPARTMENT STATE BRANCH
LOCAL GOVERNMENT CITY COUNTY
COMMUNITY COLLEGE PUBLIC SCHOOL
NORTH CAROLINA ePROCUREMENT PURCHASE
ONLINE SHOPPING STATEWIDE TERM CONTRACTS
ELECTRONIC VENDOR PORTAL HUB CERTIFIED VENDOR
QUOTE PUNCHOUT CATALOG
PURCHASE ORDER
SOURCING
BIDDING
BUY

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'**.

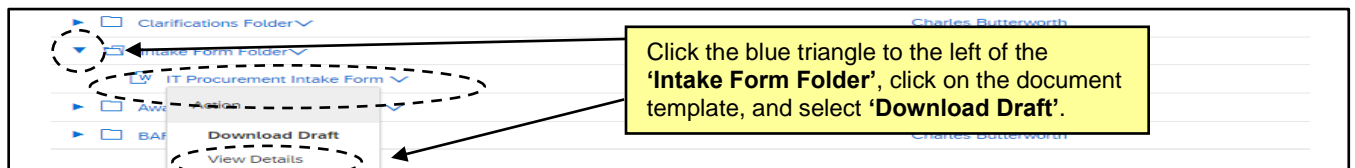
I. Submit IT Procurement Intake Form to NCDIT Reviewers for Approval

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'**.

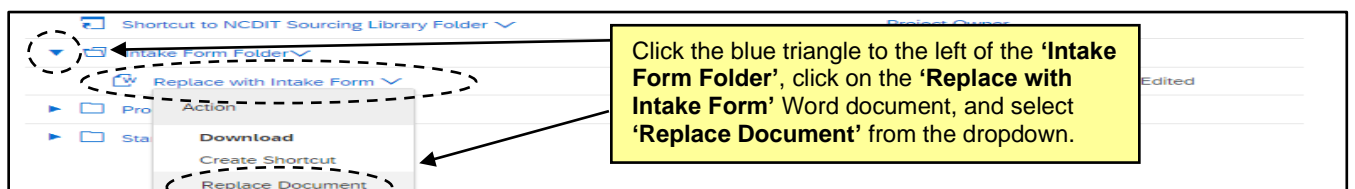
1. To kick off a Sourcing Project, Sourcing Project Owners will need to upload a completed **'IT Procurement Intake Form'** to the **'Documents'** tab. The **'IT Procurement Intake Form'** is generally completed by Agency Business and may be attached to a Purchase Requisition submitted by Agency Business. To download a blank **'IT Procurement Intake Form'** to provide to Agency Business, the Sourcing Project Owner can click on the **'Shortcut to NCDIT Sourcing Library Folder'** link at the top of the **'Documents'** tab and select **'Open'** from the dropdown.



2. Click the blue triangle to the left of the **'Intake Form Folder'**, click on the **'IT Procurement Intake Form'** Word document, and select **'Download Draft'**.



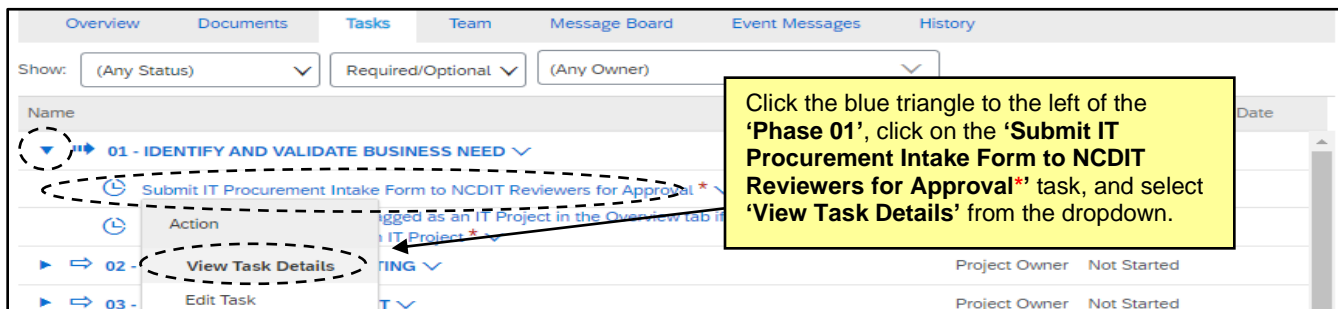
3. When the Agency Business user has provided a completed version of the **'IT Procurement Intake Form'**, the Sourcing Project Owner will need to upload it to the Sourcing Project. Back on the **'Documents'** tab, click the blue triangle to the left of the **'Intake Form Folder'**, click on the **'Replace with Intake Form'** Word document and select **'Replace Document'** from the dropdown. Choose the completed version of the form and follow the steps on the subsequent pages to **'Replace document by the updated file'** and click **'OK'** and then **'Save'**. The document's **'Status'** will update from **'Not Edited'** to **'Draft'** when replaced.



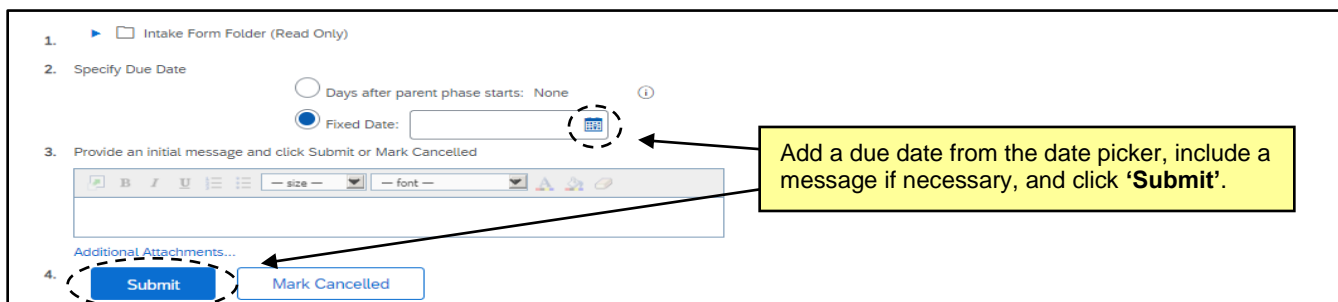
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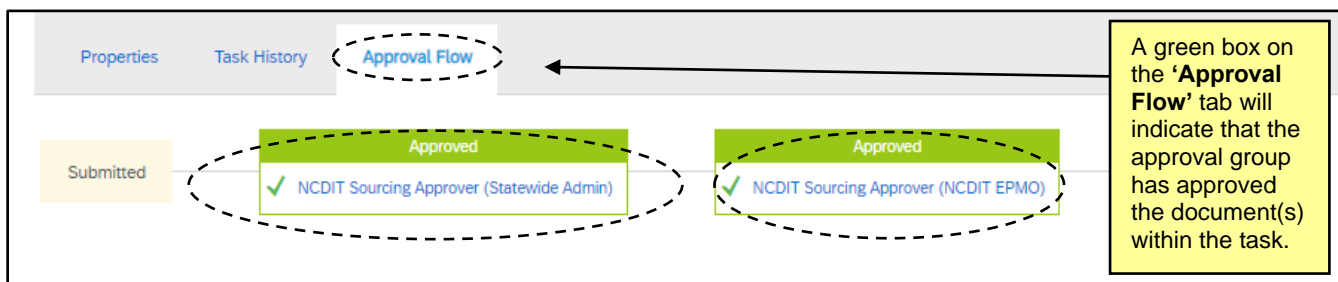
- Navigate to the **'Tasks'** tab, click the blue triangle next to **'Phase 01'** and click on the **'Submit IT Procurement Intake Form to NCDIT Reviewers for Approval'** task. Select **'View Task Details'**.



- On the subsequent **'Approval Task'** page, specify a due date from the date picker (we recommend a minimum of five business days) in the **'Fixed Date'** field and click **'Submit'** to send the document to NCDIT for approval.



- When the task has been submitted, its **'Status'** on the **'Tasks'** tab will automatically update to **'In Approval'**. To monitor the process of the review, click on the task and select **'View Task Details'** from the dropdown. Look for any comments by approval groups on the **'Task History'** tab (visible upon scrolling down the **'Approval Task'** page). To note approval groups who have approved the document, click on the **'Approval Flow'** tab next to **'Task History'** and look for the green **'Approved'** boxes. The **'Status'** of the **'Tasks'** tab will automatically update to **'Approved'** when all groups have approved.



- The next task, **'Confirm Sourcing Project is flagged as an IT Project in the Overview tab if NCDIT EPMO indicates it is an IT Project'**, 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 **'Overview'** tab, clicking **'Actions'**, and selecting **'Edit Overview'** from the dropdown. On the subsequent **'Edit'** page, click the **'Template Questions'** tab and change the answer to the first question as needed, then click **'OK'**.

II. Populate Solicitation Document and Initiate Sourcing Event

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.

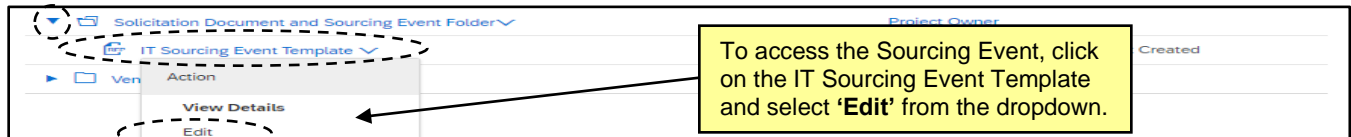
1. If it is determined that it is necessary to schedule a Procurement Planning Meeting with NCDIT, the first ‘Task’ in ‘Phase 02’ provides guidance for doing so. The Sourcing Project Owner can click on the ‘Task’ and select ‘View Task Details’, then follow the instructions listed in the ‘To Do Task’ page.
2. 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 Documents tab of the Sourcing Project (replace initial document).
3. Sourcing Project Owner can then mark the two tasks in ‘Phase 02’ either as ‘Mark Complete’ or ‘Cancelled’.

Note: ‘Mark Complete’ can be selected from the dropdown after clicking on the ‘Task’, while ‘Cancelled’ is available only after clicking ‘View Task Details’ from the dropdown.

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 initiate only **Section 1 (Rules)** and **Section 3 (Content)** before saving. The information included in the Solicitation Document is complementary to that in the content of the Sourcing Event.

1. Navigate to the ‘Documents’ tab, click on the ‘Shortcut to NCDIT Sourcing Library Folder’ and select ‘Open’ from the dropdown. Click the blue triangle next to the ‘RFx Solicitation Document Templates’ folder and click on the template document that matches the type of solicitation being posted. Select ‘Download Draft’ from the dropdown, populate the template, and save a local copy.
2. Back on the ‘Documents’ tab, click the blue triangle to the left of the ‘Solicitation Document and Sourcing Event Folder’, then click the ‘Replace with Draft IT Solicitation Document’ placeholder. Select ‘Replace Document’ from the dropdown and choose the completed version of the Solicitation Document. Follow the steps on the subsequent pages to ‘Replace document by the updated file’ and click ‘OK’ and then ‘Save’.
3. In the same folder, click on the ‘IT Sourcing Event Template’, and select ‘Edit’ from the dropdown to access to the Sourcing Event.

Note: If the Sourcing Project Owner wishes to access the Sourcing Event without initiating an edit to copy the ‘Doc Number’ for their Solicitation Document, they can select ‘View Details’ from the dropdown.



4. The ‘Edit Event’ page will display. It is important to populate the ‘Title’ 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 ‘Currency’, ‘Commodity’, and ‘Departments’ will be pre-populated based on selections made when creating the Sourcing Project. Then click ‘OK’.

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Edit Event [OK] [Cancel]

Enter overview information for this event, including a title and a description.

Title: * Example IT Sourcing Event

Description: Example IT Solicitation for Services

Test Event: * Yes No

Base Language: English

Currency: US Dollar

Commodity: 811125 - Computer software licensing re... [Add more](#)

Regions: (no value) [Add more](#)

Departments: ADMNP DOA Purchasing [Add more](#)

It's very important to be thoughtful and detailed when editing the 'Title' and adding a 'Description'. Vendors will see the contents of both fields. Click 'OK' when the edits are complete.

5. The 'Event' page will display and outline the four sections to be completed before publishing the Sourcing Event: 'Rules', 'Suppliers', 'Content', and 'Summary'.

Notes:

- Sourcing Project Owners will skip section 2 for 'Suppliers' until after sections 1 and 3 have been completed and the Sourcing Event has been approved. The 'Tasks' in 'Phase 03' outline this process and more information is provided in this document below.
- The Event will be assigned a 'Doc Number' by the system immediately preceding the Event 'Title' entered on the previous page. This 'Doc Number' will automatically be assigned as the 'Solicitation Number' in eVP and should also be included in the Solicitation Document.

Event Doc533802338 - Example IT Sourcing Event [Next] [Exit]

These rules control every aspect of how the event works. You may change them to suit your event or accept the defaults.

Envelope Rules

Number of Envelopes: 1

Authorize Teams to Open Envelopes

Envelope ID	Team
1	Project Owner

A system-generated 'Doc Number' displays before the 'Title' entered on the previous page and the four stages in the process to finalize the Sourcing Event display on the left side.

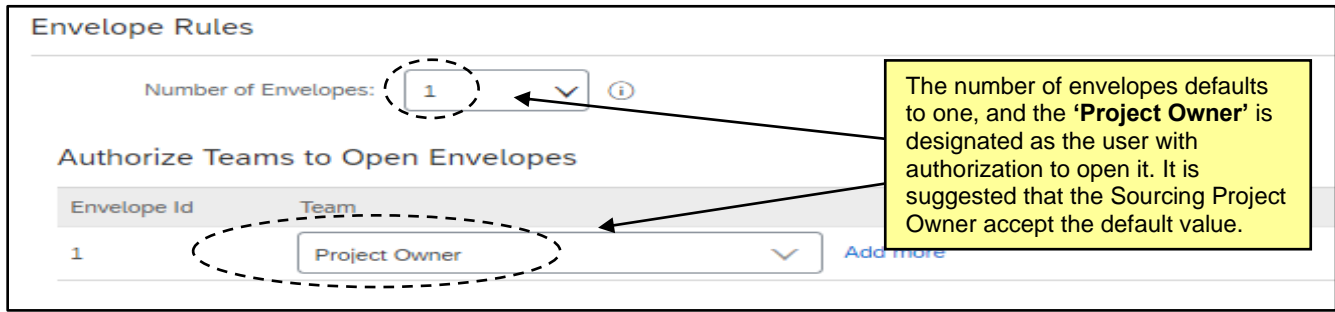
III. Setting Sourcing Event Rules

The first of the four sections to edit and set are the Sourcing Event 'Rules'. Most importantly, the rules section allows the Sourcing Project Owner to establish the 'Timing Rules' outlining when the bidding starts and stops. Many of the fields within the six sub-sections on this page are pre-populated, and it is advised that the Sourcing Project Owner leave them as is.

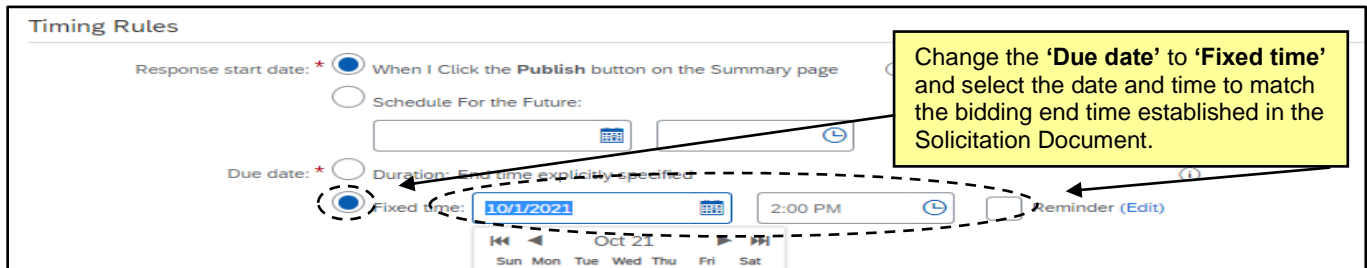
1. 'Envelope Rules' is the first subsection. The system will default the Sourcing Event to having one envelope and lists the 'Project Owner' as the user group with the ability to open the envelope. Envelopes are designed to conceal vendor response information until after the 'Due Date'. It is advised that the Sourcing Project Owner leave the default as is. If the Sourcing Project Owner would like a multiple-envelope Sourcing Event revealing different aspects of the response in layers, the Sourcing Project Owner can manually increase the number of envelopes up from one using the dropdown menu. Please see the 'Multi-Envelope Events' Job Aid for further guidance.

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2. **'Timing Rules'** is the next and most important section. There are two required fields that set when vendors can begin to respond with bids and when the deadline by which their bids are due.
 - a. **'Response start date'** defaults to **'When I click the Publish button on the Summary page'**, meaning that vendors can begin responding immediately once the Sourcing Event is finalized by clicking **'Publish'**. If the Sourcing Project Owner would prefer to set a specific date in the future for when vendors can begin to respond, click **'Schedule For the Future'** and set a specific date and time from the pickers.
 - b. **'Due date'** sets the time when the bidding period is closed. It defaults to a **'Duration'** of 10 days, but it should be switched to a **'Fixed time'** where the user can set a specific closing date and time at least three days in advance from the pickers. This date 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.



3. It is suggested that the Sourcing Project Owner leave all defaulted values as is for sections three through six. These four sections are **'Bidding Rules'**, **'Project Owner Actions'**, **'Market Feedback'**, and **'Message Board'**. When all Event **'Rules'** have been set, click onto Section 3 for **'Content'**.

IV. Updating the Sourcing Event Content

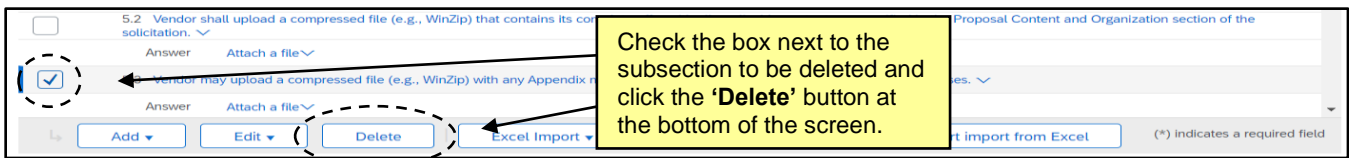
The **'Content'** section of the Sourcing Event is where the Sourcing Project Owner can share all information about the products or services they wish to receive bids on, and it serves as the framework for vendors to provide a response. NCDIT has created a template in this section that complements the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

1. The **'Content'** stage 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.

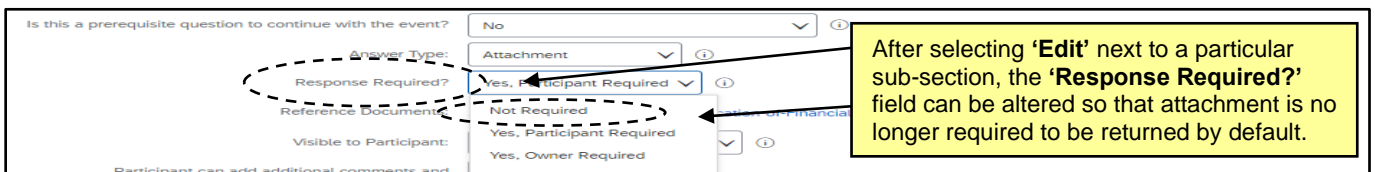
- 3) **Solicitation Document and Details:** Sourcing Project Owners will upload their completed **'Solicitation Document'** in subsection 3.1. Vendors will find instructions for submitting questions in subsection 3.2 as well as a **'Vendor Question Submission Template'**. If an **'Addendum'** is required, 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.

Note: 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.

2. Scroll to **Section 5, 'Vendor Response'**. 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 bottom of the **'Content'** section. That subsection will be removed (it cannot be undeleted), and the subsection numbering below it will automatically adjust.



3. To edit a subsection, check the box to its left and click the **'Edit'** button at the bottom of the **'Content'** section. From the subsequent dropdown menu, click **'Content'**.
4. The **'Edit Question'** page will display, although it is advised that no edits be made to default subsections. One potential field to change is the **'Response Required?'** field. This field defaults to **'Yes, Participant Required'**. If the Sourcing Project Owner would like to keep the question in the content but not make it a mandatory for the vendor to return, they can select **'Not Required'** from the dropdown menu and click **'Done'**.

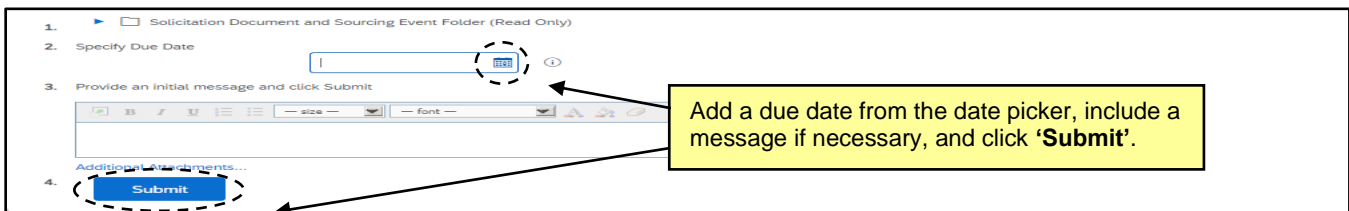


5. Once all **'Content'** is set, click the **'Exit'** button in the top right to save the Sourcing Event. The **'Confirm Edit Event Exit'** screen will display providing the Sourcing Project Owner with various options. Clicking **'return to project'** will save the Sourcing Event as is and take the Sourcing Project Owner to the originating Sourcing Project where they can begin the process to have the Sourcing Event approved.

V. Submit Draft Solicitation Document for Agency Approval

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'** tab. An edited Solicitation Document and Sourcing Event will serve as the triggers for the approval task, so both must be actioned upon as outlined above before this approval task can be submitted.

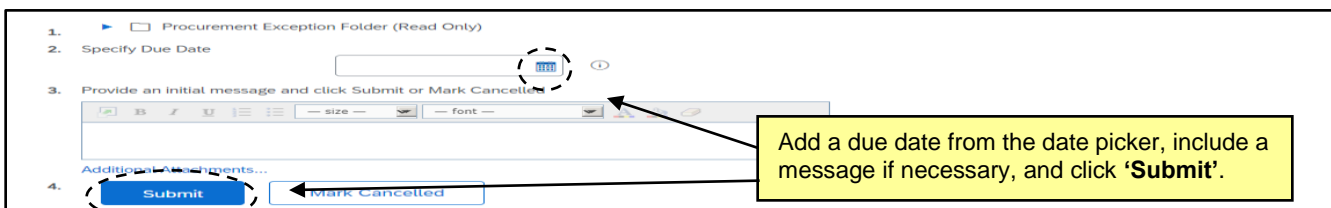
1. On the **'Tasks'** tab, click on the **'Submit Draft Solicitation Document for Agency Approval'** task and select **'View Task Details'** from the drop down. On the subsequent **'Approval Task'** page, add a due date from the date picker (we recommend an minimum of five business days), add a message to the **'Agency CIO'** if necessary, and then click **'Submit'**. The **'Status'** of the **'Task'** tab will automatically update to **'Approved'** when the **'Agency CIO'** approves.



VI. Submit Procurement Exception Request to NCDIT (if applicable)

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 submit a Procurement Exception Request (Form A) to NCDIT for approval in the Sourcing Tool in conjunction with sending the draft IT solicitation document and Sourcing Event for approval. The **'Submit Procurement Exception Request to NCDIT (if applicable)'** task will guide this process. If no Procurement Exception is required, the Sourcing Project Owner can skip this section.

1. From the **'Documents'** tab, click on the **'Shortcut to NCDIT Sourcing Library Folder'** link and select **'Open'** from the dropdown. Click the blue triangle to the left of the **'Exceptions Folder'**, click on the **'Procurement Exception Request – Form A'** document, and select **'Download Draft'**.
2. 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'** on the **'Documents'** tab by replacing the **'Replace with Procurement Exception Request (Form A)'** document in the same manner as done with the IT Procurement Intake Form in **Section I** of this guide.
3. Navigate to **'Phase 04'** of the **'Tasks'** tab and click on the **'Submit Procurement Exception Request to NCDIT (if applicable)'** task. Select **'View Task Details'**.
4. On the subsequent **'Approval Task'** page, specify a due date from the date picker (we recommend a minimum of five business days) and click **'Submit'** to send the document to NCDIT for review.

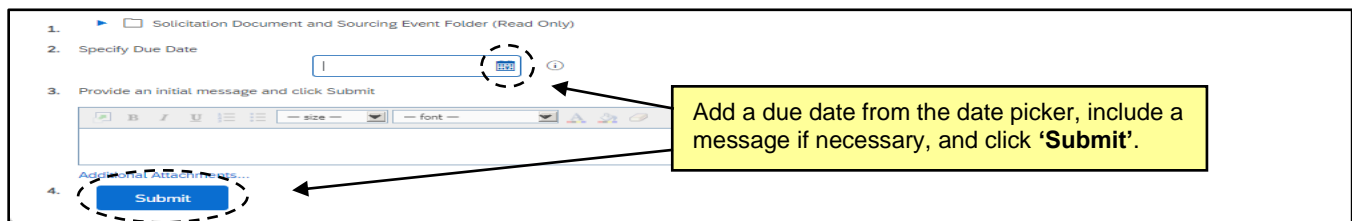


- When the task has been submitted, its **'Status'** on the **'Tasks'** tab will automatically update to **'In Approval'**. To monitor the process of the approval task, click on the task and select **'View Task Details'** from the dropdown. Look for any comments by a NCDIT review group on the **'Task History'** tab (visible upon scrolling down the **'Approval Task'** page). After NCDIT fully approves the Exception Request, the task will automatically update to **'Approved'** status on the **'Tasks'** tab.

VII. Gain NCDIT Approval of Solicitation Document and Sourcing Event

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.

- On the **'Tasks'** tab, click on the **'Gain NCDIT Approval of Solicitation Document and Sourcing Event'** task and select **'View Task Details'** from the drop down. On the subsequent **'Approval Task'** page, add a due date from the date picker (we recommend a minimum of five business days), add a message to NCDIT if necessary, and then click **'Submit'**.



- When the task has been submitted, its **'Status'** on the **'Tasks'** tab will automatically update to **'In Approval'**. To monitor the process of the approval, click on the task and select **'View Task Details'** from the dropdown. Look for any comments by a NCDIT approval group on the **'Task History'** tab (visible upon scrolling down the **'Approval Task'** page). To see which approval groups are included in the approval workflow, click on the **'Approval Flow'** tab next to **'Task History'**.
 - An approval group that has not been sent the approval task will be displayed in the **'Approval Flow'** tab with the word **'Pending'** in the top box that is shaded gray. These groups have yet to receive the approval request and will not become **'Active'** until the approval task is submitted by the Sourcing Project Owner and any previous approval node completes their approval.
 - An approval group that is currently in the process of approving the task will be displayed in the **'Approval Flow'** tab with the word **'Active'** in the top box that is shaded blue.
 - An approval group that has completed its approval will be displayed in the **'Approval Flow'** tab with the word **'Approved'** in the top box that is shaded green.

Note: NCDIT may attach an edited version of the Solicitation Document in the **'Task History'** tab.

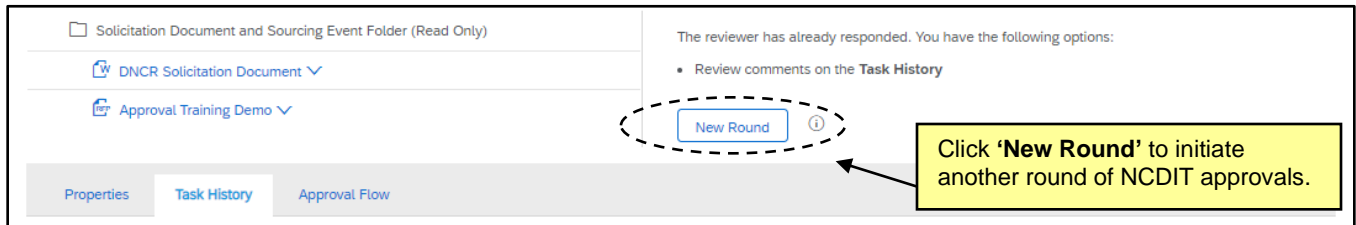


- If NCDIT denies the approval request, the Sourcing Project Owner should work with applicable Agency staff to address NCDIT's feedback and develop an updated Solicitation Document.

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- The Sourcing Project Owner should return to the **'Documents'** tab and replace the Solicitation Document draft with the updated version.
- The Sourcing Project Owners should go to the **'Gain NCDIT Approval of Solicitation Document and Sourcing Event'** task and click the **'New Round'** button.



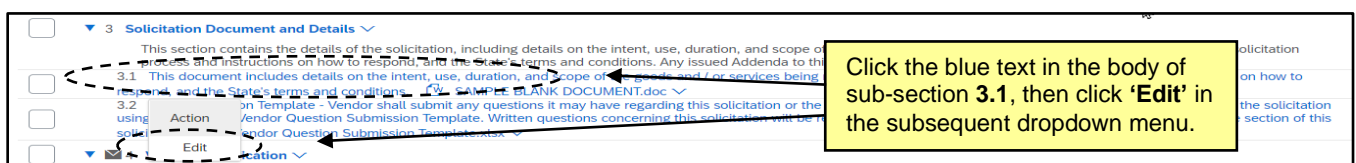
- On the next page, the Sourcing Project Owner can set a new **'Due Date'** (we recommend a minimum of five business days), add a note letting NCDIT know that the identified issues have been addressed, and re-submit the task for another round of approvals.
- After NCDIT reviews and fully approves the Solicitation Document and Sourcing Event, the task will automatically update to **'Approved'** status on the **'Tasks'** tab and a checkmark will appear to the left.

04 - REVIEW AND APPROVE SOURCING EVENT	Solicitation Document and Sourcing Event Folder	Project Owner	Complete	01/18/2023
Gain NCDIT Approval of Solicitation Document and Sourcing Event *	classroomtraining46	Approved	01/18/2023	
05 - CONDUCT SOURCING EVENT	Project Owner	Not Started		

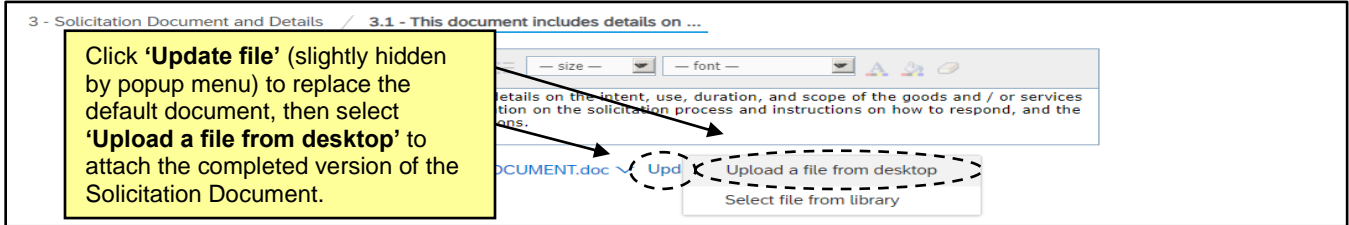
VIII. Review the Timing Rules and Finalize the Sourcing Event Content

After receiving approval from NCDIT to post the solicitation, the Sourcing Project Owner should finalize 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, then go to **Section 3 (Content)** to attach the final version of the **'Solicitation Document'** to **subsection 3.1**, and make any other necessary updates.

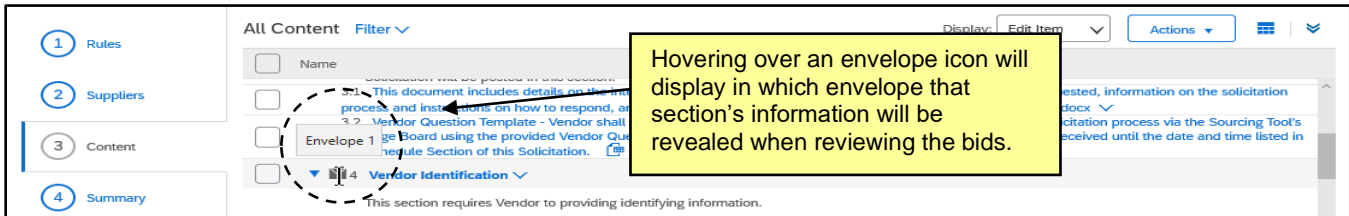
- Clicking on the **'Draft'** version of the Sourcing Event from the **'My Documents'** portlet will take the Sourcing Project Owner directly into **'Edit'** mode. If accessing the Sourcing Event from the **'Documents'** tab within the Sourcing Project, the Sourcing Project Owner must select **'Edit'** from the dropdown.
- Verify that the **'Due date'** under **'Timing Rules'** in **Section 1 (Rules)** has not changed during the solicitation approval process. If it has, update the **'Fixed time'** accordingly.
- Navigate to **Section 3 (Content)** to add the finalized version of the **'Solicitation Document'** in **subsection 3.1** and make any other necessary adjustments.
- Scroll to **Section 3, 'Solicitation Document and Details'**. A **'SAMPLE BLANK DOCUMENT.doc'** is attached to **subsection 3.1** by default. To replace this document, click on the blue text in the body of **3.1** and select **'Edit'** from the subsequent dropdown menu.



- The 'Edit Attachment' page displays. Click 'Update file' next to the 'SAMPLE BLANK DOCUMENT.doc' file, and then attach the finalized Solicitation Document by selecting 'Upload a file from desktop'. Click 'OK' after selecting the file, then click 'Done' on the subsequent screen.



- There is no action necessary in Section 4, 'Vendor Identification'. Note the envelope icon next to the number and hover the cursor over it to display in which envelope that section's answers will be revealed if the default is changed to more than one. To set the Envelope in which a section's answers will be concealed, check the box to the left of the section, click 'Edit', and select 'Content' from the dropdown, then set the number from the 'Envelope' field dropdown.



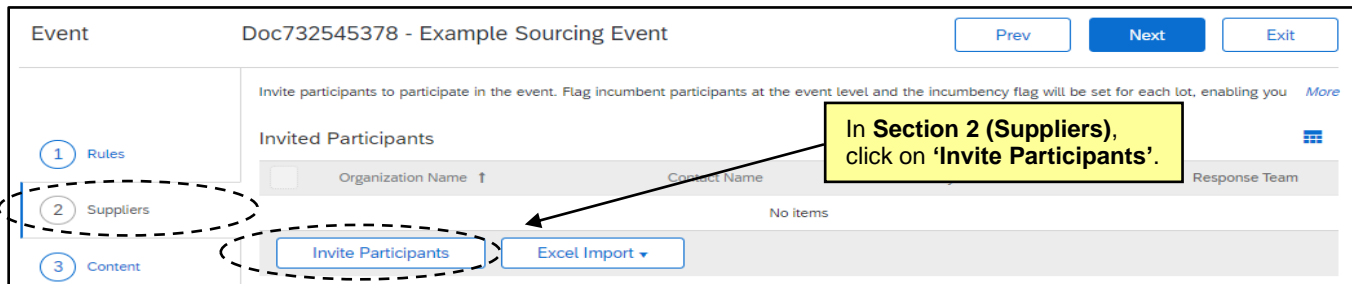
- If no updates are necessary in Section 5, 'Vendor Response', click onto Section 2 (Suppliers).

IX. Invite Participants to Respond to the Event

Once the Rules and Content are finalized, the Sourcing Project Owner will be ready to go back to the section they previously skipped, Section 2 (Suppliers). In this section, they will select the designated 'NC eProcurement Sourcing' supplier to invite, which, once the Sourcing Event is published will trigger its automatic posting to the Public eVP. Vendors wishing to respond will then click the 'Intends to Participate' button to receive an email with a link to respond electronically through their Ariba accounts.

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 NOT select the designated 'NC eProcurement Sourcing' vendor, but rather, 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.

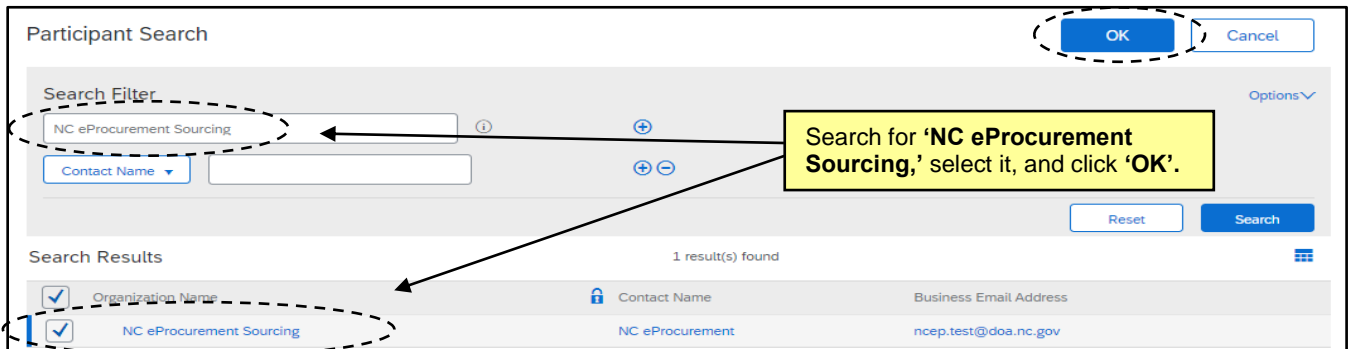
- Navigate to Section 2 (Suppliers). The 'Invited Participants' page will display. Click 'Invite Participants'.



NC eProcurement

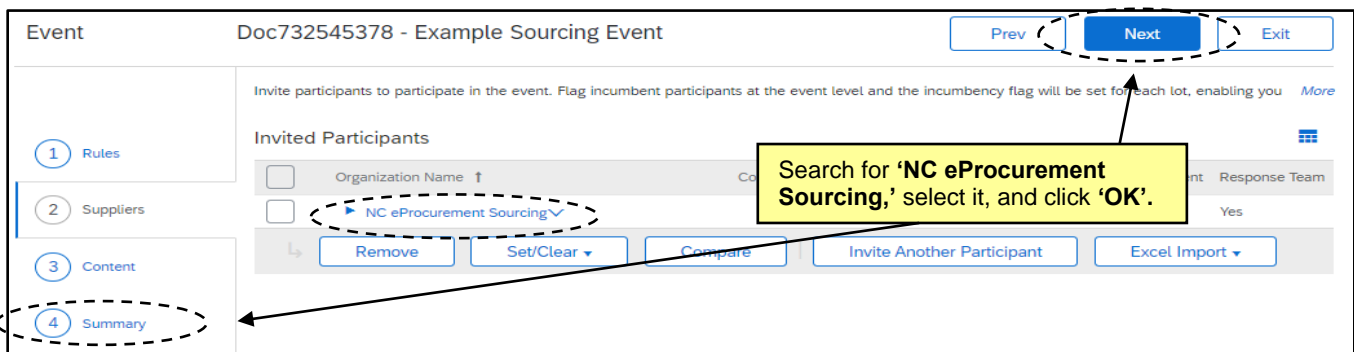
Publishing a Sourcing Event (IT)

2. On the subsequent **'Participant Search'** page, use the **'Search Filter'** to find the designated **'NC eProcurement Sourcing'** vendor. Check the box to the left of the search results and click **'OK'**.



3. The designated **'NC eProcurement Sourcing'** vendor will appear on the **'Invited Participants'** page. Users can either click **'Next'** twice or onto **'Summary'** to proceed to finalize and publish the Sourcing Event so that it can be automatically posted to Public eVP.

Note: If a private SOW or RFQ is being conducted, the Sourcing Project Owner should search for and invite the approved vendor to add them to **'Suppliers'** tab of the Sourcing Event. If more than one vendor has been approved to participate in the private solicitation, click **'Invite Another Participant'** 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) selected will receive an email with a link to respond to the Sourcing Event.



X. Summary Section and Publishing the Event

When **Section 2 (Suppliers)** is complete, the Sourcing Project Owner can proceed to the final **'Summary'** section. This contains the summary of the first three sections and allows the Sourcing Project Owner to review and edit before clicking **'Publish'**.

1. The **'Overview'** information is at the top of the page. Scroll down to review the **'Rules'**, **'Suppliers'**, and **'Content'** information. To edit any of the **'Overview'**, click the **'Actions'** button and select **'Edit Overview'** from the dropdown menu. If any other sections need to be edited, click on that section on the left side of the screen.
2. For a summary of the entire contents of the Sourcing Event in the form of a MS Word document, click the **'Actions'** button and select **'Print Event Information'**. The system will generate an up-to-date, time-stamped document.

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3. The Sourcing Project Owner can now click the **'Publish'** button to finalize the Sourcing Event.

4. The **'Event Published'** page displays, and the Sourcing Project Owner will have the option go back to the Sourcing Event by clicking **'Monitor'** or return to the overall Sourcing Project. It is advised to select **'Monitor'** to verify the countdown clock for the Sourcing Event **'Due date'** is accurate.

5. Upon returning to the Sourcing Event, the Sourcing Project Owner will find seven tabs at the top of the screen. The **'Overview'** tab is where the **'Rules'** are summarized along with a **'Version History'** section towards the bottom of the page. Other tabs are **'Content'**, **'Suppliers'**, **'Messages'**, **'Log'**, and **'Award'**. The **'Award'** tab can be ignored. Clicking the **'Actions'** button will display several options including **'Edit'** to make any necessary changes and **'View Project'** to navigate directly back to the Sourcing Project within which this Sourcing Event exists.

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- Based on the timing rules established, it may immediately be **Open** to receive bids as is the case below. A clock will appear in the upper right counting down how much time is left until the bidding period ends.

The screenshot displays the 'Doc732545378 - Example Sourcing Event' page. At the top, a navigation bar includes tabs for 'Overview', 'Content', 'Suppliers', 'Messages', 'Log', and 'Award'. A 'Time remaining' clock in the top right corner shows '17 days 02:26:31'. Below the navigation bar, the 'Overview' section shows the event details: ID: Doc732545378, Description: Solicitation for Services, Status: Open, and Version: v3. An 'Actions' dropdown menu is visible in the top right. Three yellow callout boxes provide additional information: one points to the navigation tabs, another points to the 'Status: Open' field, and a third points to the 'Actions' dropdown.

Sourcing Project Owner can navigate between different tabs at the top of the screen.

When the bidding goes live (based on timing rules), a countdown clock through the end of the bidding period appears, and the status goes to **Open**.

The **'Actions'** dropdown allows Sourcing Project Owner to select options like **'Edit'** and **'View Project'**.

- 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.