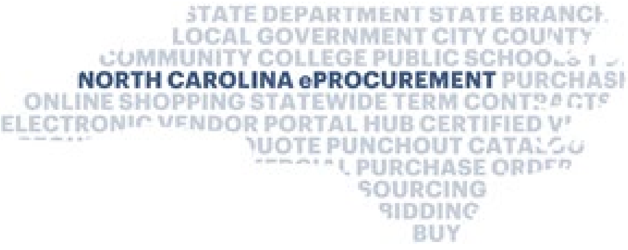
Publishing a Sourcing Event (Non-IT)

Introduction

A Sourcing Event is the vendor-facing part of a Sourcing Project. The Sourcing Agent can establish the bidding dates and time, as well as compile all information the vendors will need to respond, as guided by a template established by the state. 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.



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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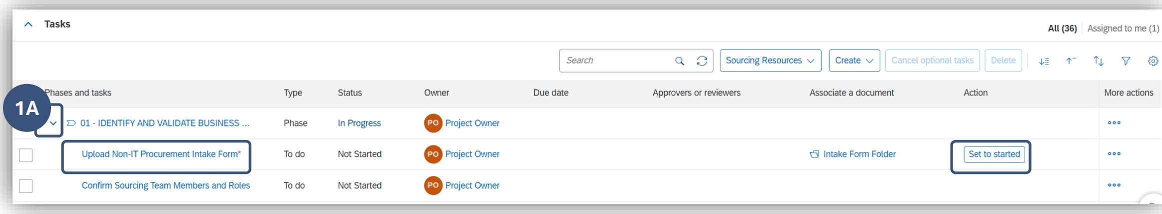
Upload Non-IT Procurement Intake Form

1. The **Non-IT Procurement Intake Form** is generally completed by an Agency Business user and contains summary information about the Non-IT business need. Sourcing Project Owners will upload the completed **Non-IT Procurement Intake Form** and complete the first task of **Phase 01**.

   A. To start the **Upload Non-IT Procurement Intake Form** task from the Sourcing Project, scroll down to the **Tasks** section, click the blue arrow next to **Phase 01**, and either scroll to the right and click **Set to Started** in the Action column or click on **Upload Non-IT Procurement Intake Form** and click **Set to Started** at the top right of the task.



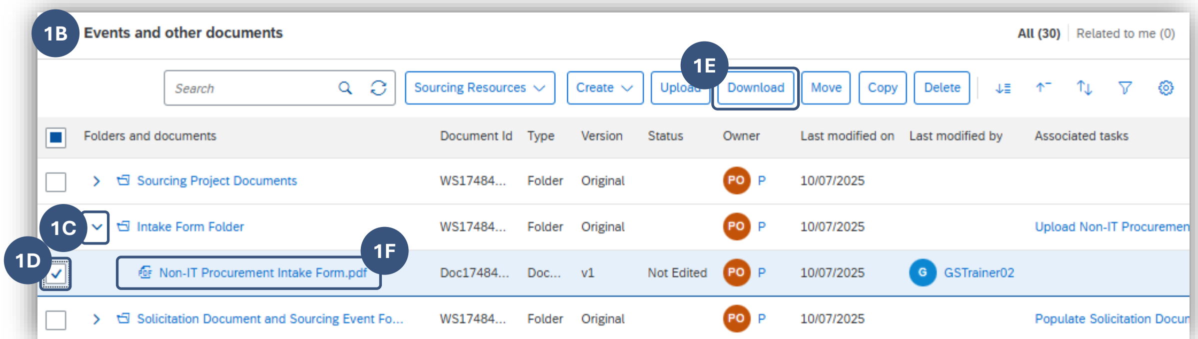
   B. To download a blank copy of the fillable PDF **Non-IT Procurement Intake Form** from the Sourcing Project, scroll down to the **Events and other documents** section.

   C. Click the blue arrow to the left of the **Intake Form Folder**.

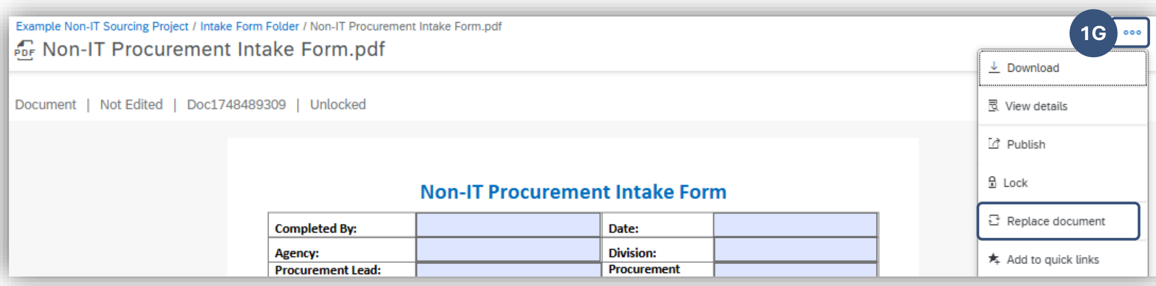
   D. Click the checkbox to the left of the **Non-IT Procurement Intake Form** document.

   E. Select the **Download** button.

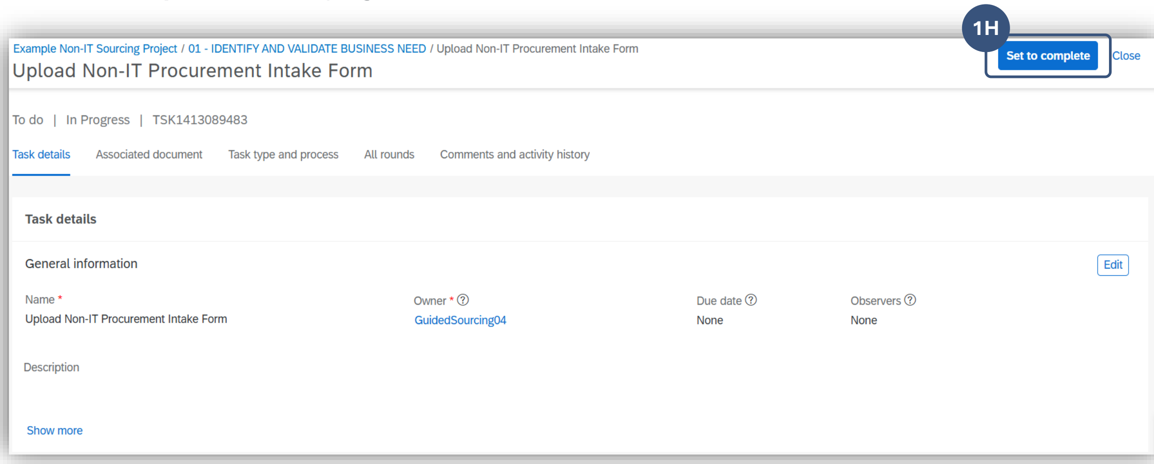
   F. When the fillable PDF **Non-IT Procurement Intake Form** has been completed, the Sourcing Project Owner will need to upload it to the Sourcing Project. Back in the **Events and other documents** section, click on the row highlighted in blue, and select the **Non-IT Procurement Intake Form** document.



   G. Click the three dots at 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 document's status will update from **Not Edited** to **Draft** when replaced.



H. Click **Close** at the top right corner of the screen and then navigate to the **Tasks** section. Click the blue arrow next to **Phase 01**, and either scroll to the right and click **Set to Complete** in the Action column next to the **Upload Non-IT Procurement Intake Form** task or click on the **Upload Non-IT Procurement Intake Form** task and click **Set to Complete** at the top right of the task.

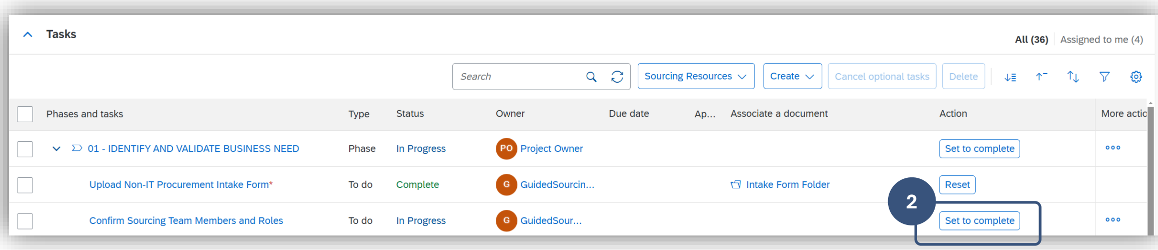


Confirm Sourcing Team Members and Roles

2 The Sourcing Project Owner should next review and complete the **Confirm Sourcing Team Members and Roles** task. The Sourcing Project Owner should scroll down to the **Tasks** section, click the blue arrow next to **Phase 01**, scroll to the right of the **Confirm Sourcing Team Members and Roles** task, and click **Set to Started** in the Action column.

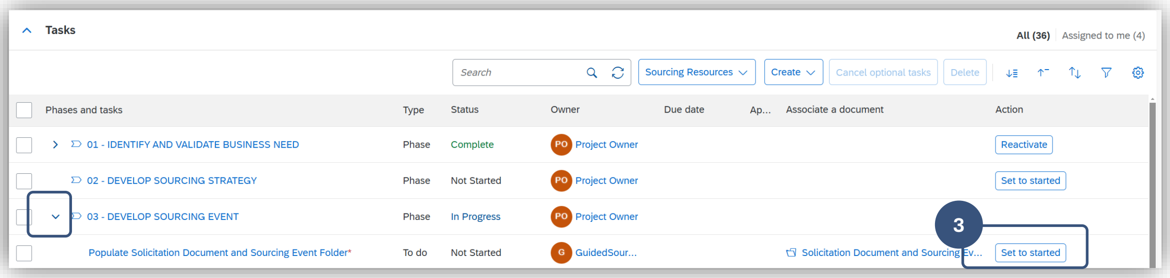
A. If it is determined that it is necessary to update the Team members or roles, instructions for how to do so can be found in the **Creating a Sourcing Project Job Aid**. Once any necessary updates are made, the Sourcing Project Owner should scroll down to the **Tasks** section, click the blue arrow next to Phase 01, scroll to the right of the **Confirm Sourcing Team Members and Roles** task, and click **Set to Complete**.

B. If it is determined that it is not necessary to update the Team members or roles, the Sourcing Project owner should scroll down to the Tasks section, click the blue arrow next to **Phase 01**, scroll to the right of the **Confirm Sourcing Team Members and Roles** task, and click **Set to Complete**.



Populate Solicitation Document and Sourcing Event Folder

3 Once the **Confirm Sourcing Team Members and Roles** and **Upload Non-IT Procurement Intake Form** tasks are completed, the Sourcing Project Owner should start the **Populate Solicitation Document and Sourcing Event Folder** task by navigating to the **Tasks** section, expanding **Phase 03**, and clicking the **Set to started** button.



The Solicitation Document template, Bid Evaluation Matrix Tool Template, and Non-IT Sourcing Event Template are located in the **Solicitation Document and Sourcing Event** folder. These items must be replaced or edited before the **Populate Solicitation Document and Sourcing Event Folder** task can be completed. The Solicitation Document template and Bid Evaluation Matrix Tool Template can be downloaded and replaced by following these steps.

A. Navigate to the **Events and other documents** section of the Sourcing Project and click the blue arrow next to the **Solicitation Document and Sourcing Event** folder. Check the box next to the Solicitation Document template. Select the **Download** button, populate the template, and save a local copy. Repeat this step for the **Bid Evaluation Matrix Tool Template** document.

B. From the **Events and other documents** section, click the blue arrow to the left of the **Solicitation Document and Sourcing Event** folder, then click into the Solicitation Document. Click the three dots at the top right and select **Replace document** from the dropdown to upload the completed version of the Solicitation Document. Repeat this step for the **Bid Evaluation Matrix Tool Template** document and upload any additional documents that P&C 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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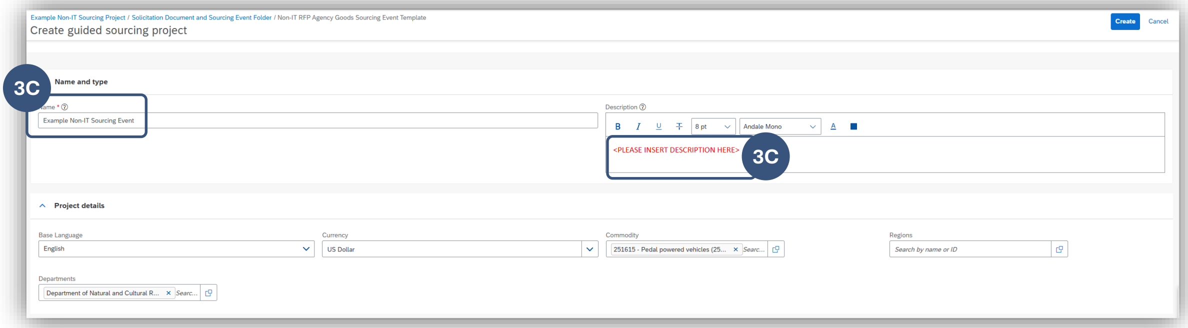
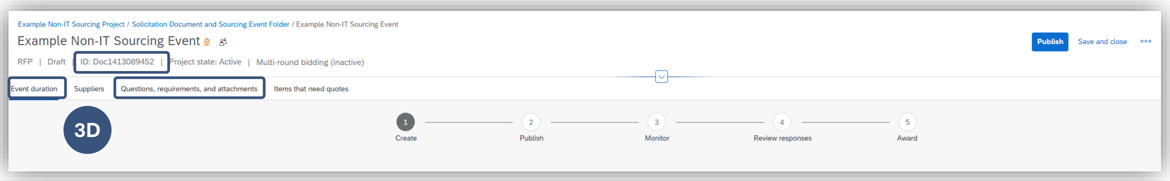
C. In the same **Solicitation Document and Sourcing Event** folder, click on the **Sourcing Event Template** to initiate the Sourcing Event. The **Create guided sourcing project** page will display. It is important to populate the **Name** and **Description** with pertinent information, keeping in mind that both will be visible to vendors and will also populate on the public eVP record of the solicitation. All other fields should remain in the current default status, and **Commodity** and **Departments** will be pre-populated based on selections made when creating the **Sourcing Project**. Next, select the **Create** button.



D. 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.



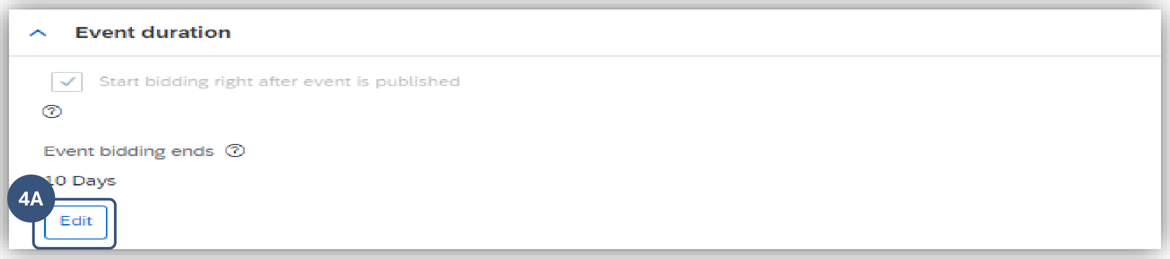
Sourcing Project Owners will only adjust the **Event duration** (Due Date) and **Questions, requirements, and attachments** (Content) sections before saving it to send to the P&C for approval.

Publishing a Sourcing Event (Non-IT)

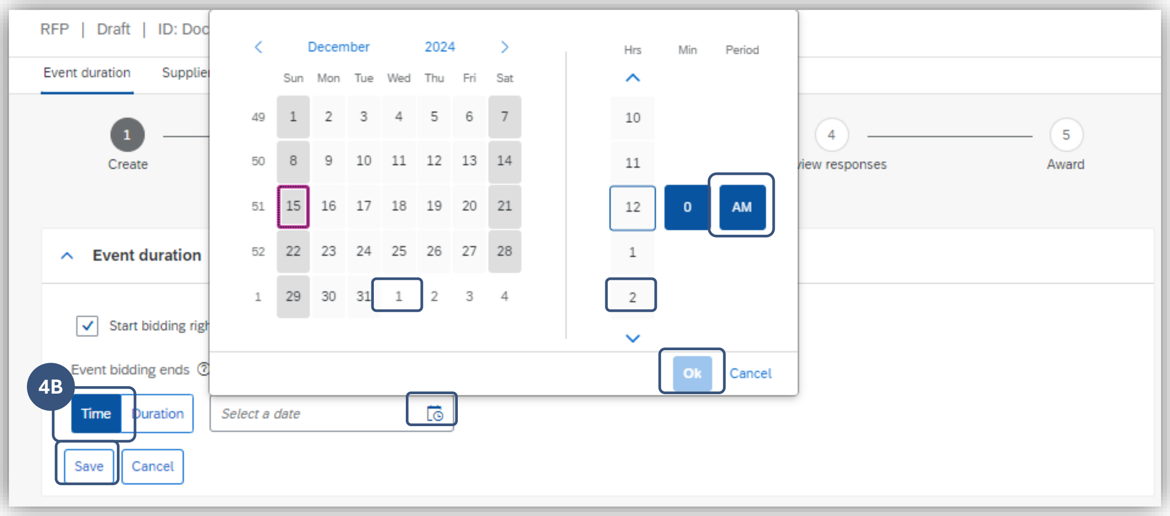
Setting the Event duration (Due date)

4 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 to close the Event and click the **AM** button to change it to **PM**.

Leave the box checked for **Start bidding right after event is published** (this box is checked by default).

Publishing a Sourcing Event (Non-IT)

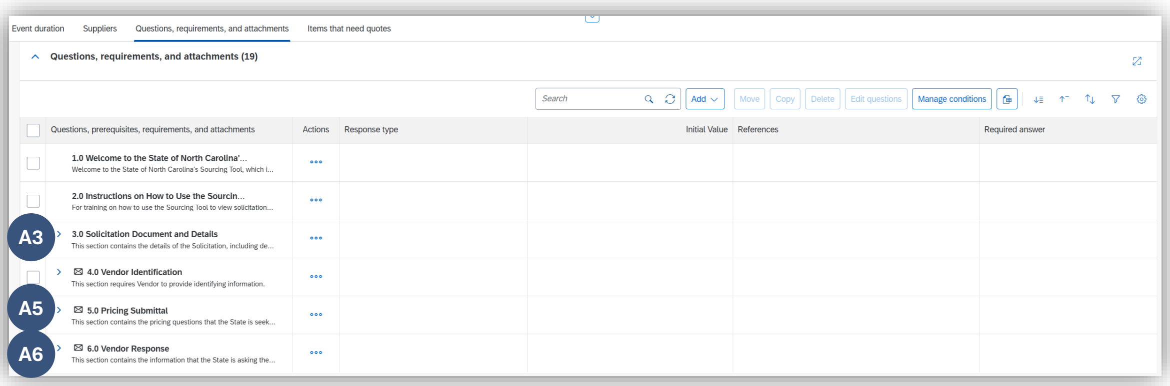
Updating the Questions, requirements, and attachments (Content)

5 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. P&C has created a template in this section that complements the default structure of the various RFx Solicitation Document templates.

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

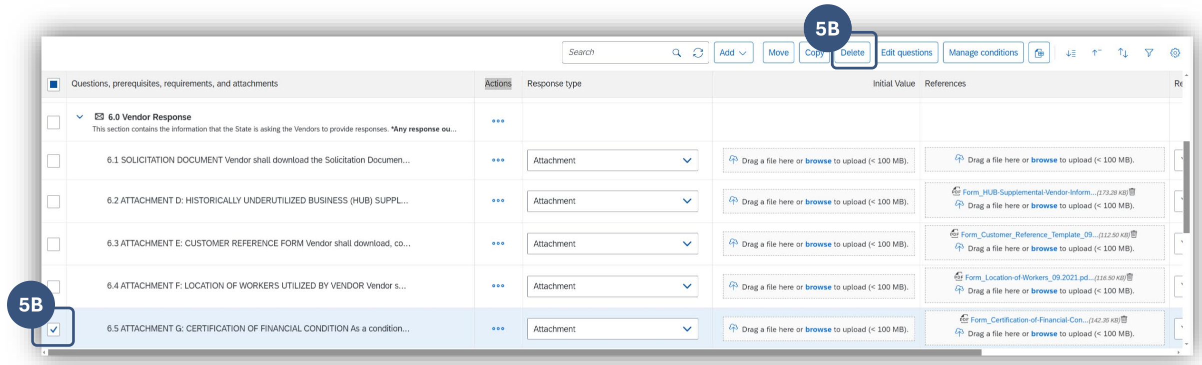
1. **Welcome to the State of North Carolina's Sourcing Tool**: A brief welcome message to vendors.
2. **Instructions on How to Use the Sourcing Tool**: Instructions and tips for vendors on how to provide a response within the tool.
3. **Solicitation Document and Details**: Sourcing Project Owners will 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. **Pricing Submittal**: Sourcing Project Owners will upload a customized pricing response template that vendors will download, complete with the prices they are bidding on the requested products or services, and re-upload to the Event as an attachment.
6. **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 **6.1** 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.



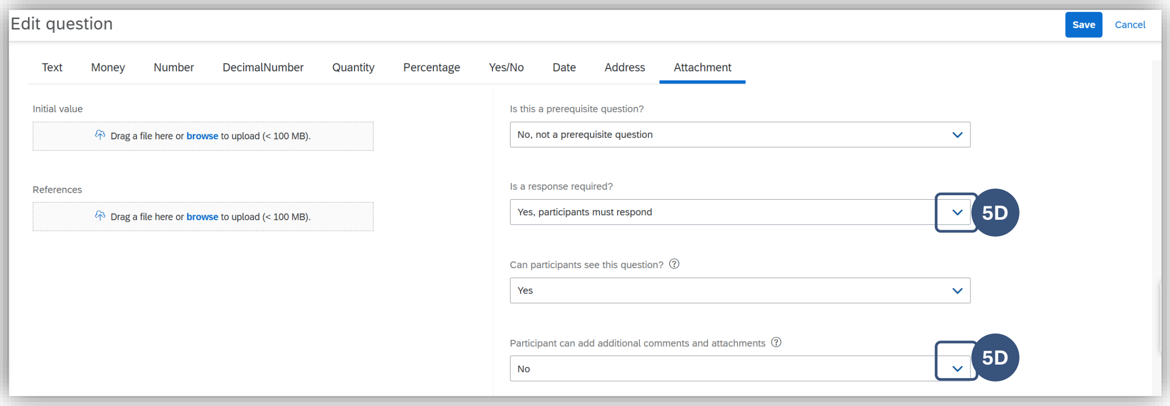
Publishing a Sourcing Event (Non-IT)

B. Click the right arrow next to **6.0 Vendor Response** to expand it. This section is populated with several subsections instructing vendors to submit their bid response via various attachments. The first attachment subsection is 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.



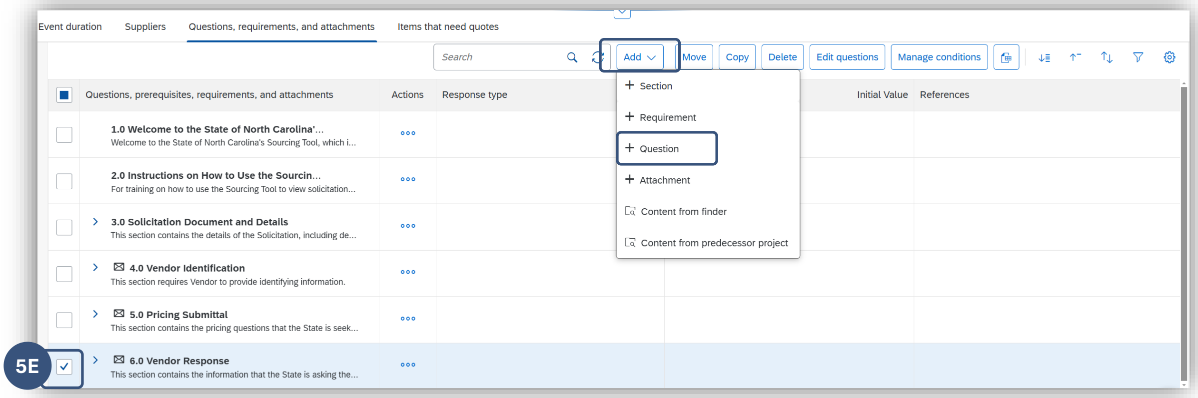
C. To edit a subsection, check the box to its left and click the three dots to its right and select **Edit question** from the popup.

D. The **Edit question** page will display, although it is advised that no edits be made to default subsections. There are two potential fields to change: **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**.

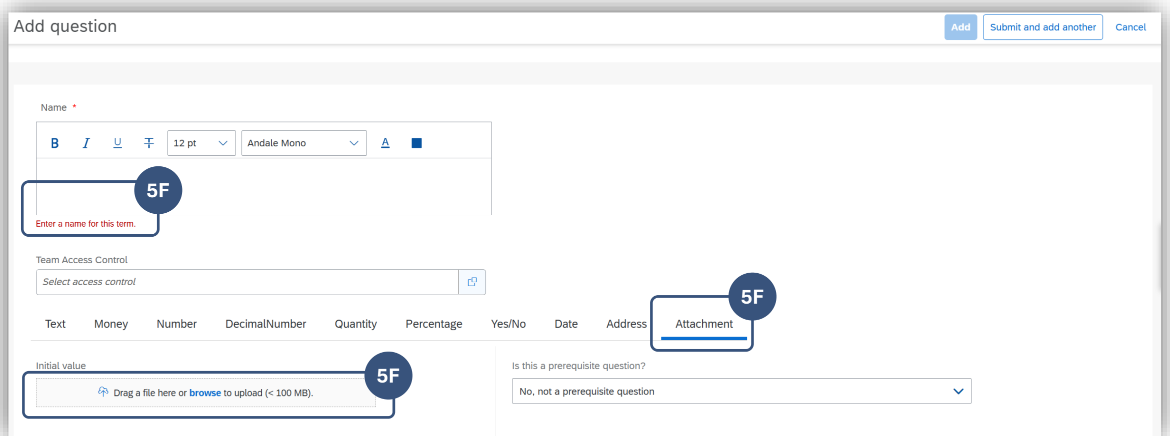


Publishing a Sourcing Event (Non-IT)

E. To add a subsection, check the box next to **6.0 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.



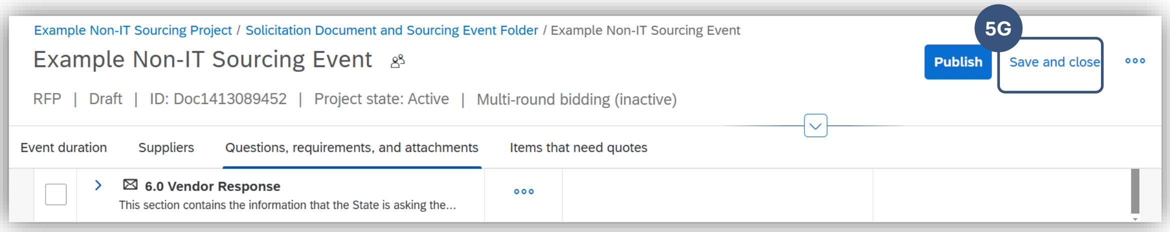
F. Click on **See all options** on the subsequent popup. On the next page, enter a **Name** for the new subsection and set any other options. If the Project Owner selected a question and wants the vendor to return a document, select **Attachment** as the **Response type** and add an **Initial value** 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 6.



Publishing a Sourcing Event (Non-IT)

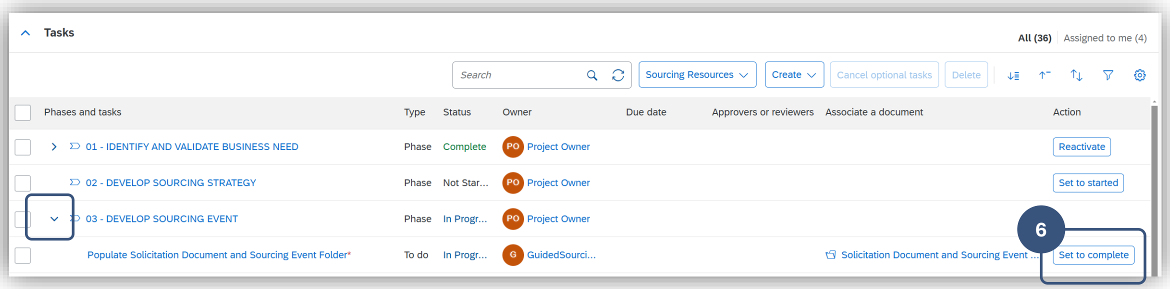
G. Once all **Content** is set in the **Questions, requirements, and attachments** section, click **Save and close** at the top right to save the Sourcing Event, and return to the Sourcing Project.

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



Complete the Populate Solicitation Document and Sourcing Event Folder Task

6 Navigate to the **Tasks** section. Click the blue arrow next to **Phase 03** and scroll to the right of the **Populate Solicitation Document and Sourcing Event Folder** task and click **Set to Complete** in the Action or click on **Populate Solicitation Document and Sourcing Event Folder** and click **Set to Complete** at the top right of the task.

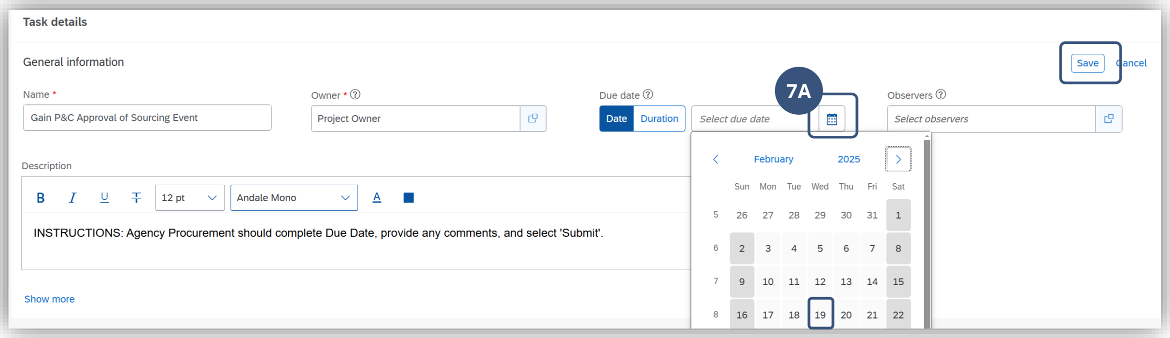


Publishing a Sourcing Event (Non-IT)

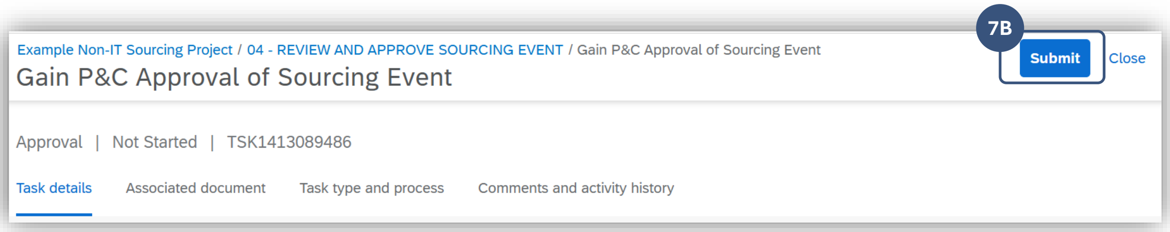
Gain P&C Approval of Solicitation Document and Sourcing Event

7 When the task is complete in **Phase 03**, the Sourcing Project Owner can proceed to **Phase 04** to submit the Solicitation Document and Sourcing Event for approval by P&C.

A. In the **Tasks** section, click on the **Gain P&C Approval of Sourcing Event** task. On the subsequent page, the approval flow will be set automatically. The **Due date** can be added by selecting the **Edit** button, using the date picker in the **Due date** field and clicking **Save**.



B. Click the **Submit** button in the upper right-hand corner of the screen.



C. 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 P&C 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.

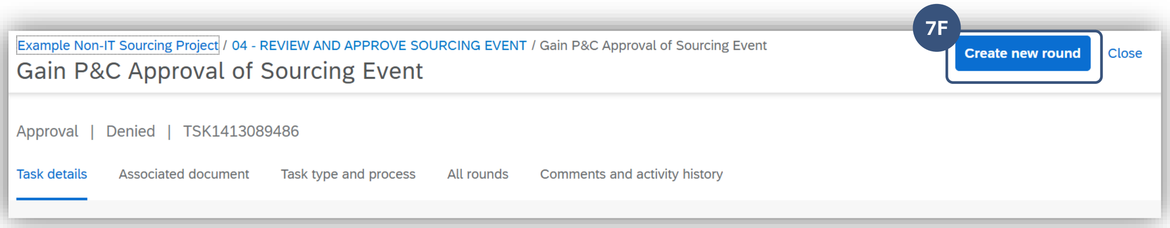
1. An approval group that has not been sent the approval task will be displayed in the **Approval flow** section as **Pending**. These groups have yet to receive the approval request and will not become **Ready for approval** until the approval task is submitted by the Sourcing Project Owner and any 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 P&C may attach an edited version of the Solicitation Document to a comment.

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

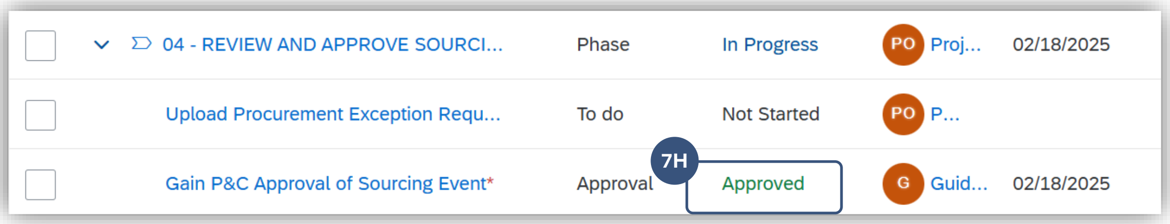
E. The Sourcing Project Owner should return to the **Events and other documents** section and replace the Solicitation Document draft with the updated version.

F. The Sourcing Project Owner should then go back to the **Gain P&C Approval of Sourcing Event** task and click **Create new round**.



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

H. After P&C 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

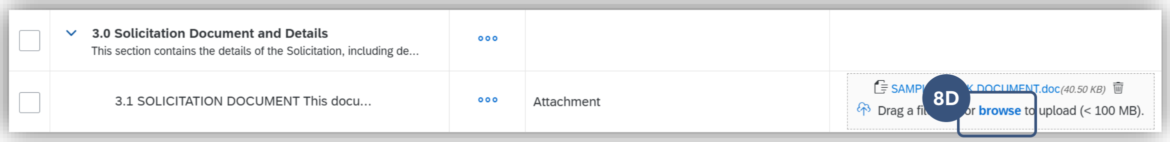
8 After receiving approval from P&C to post the solicitation, the Sourcing Project Owner should finalize their Solicitation Document, return to the Sourcing Event to update any dates that may have changed during the approval process, then go to the **Questions, requirements, and attachments** (Content) 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.

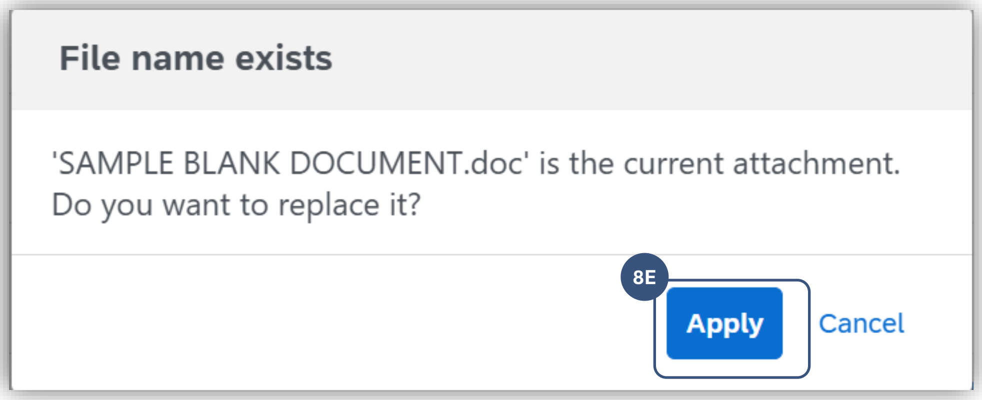
B. Verify that the **Due date** in the **Event duration** section has not changed during the solicitation approval process. If it has, update it accordingly via the **Edit** button.

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.



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.**

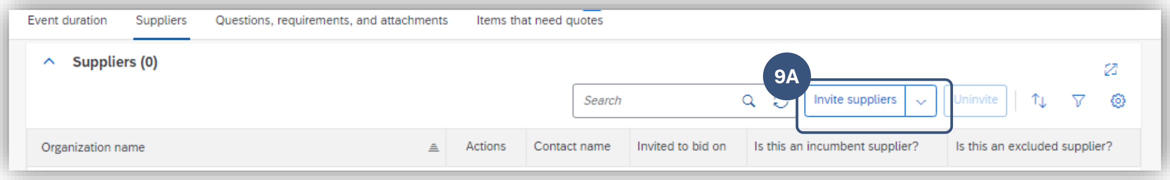


F. There is no action necessary in Section **4.0 Vendor Identification**. If no updates are necessary in Section **5.0 Pricing Submittal** or **6.0 Vendor Response**, the Sourcing Project Owner can click **Publish** and skip to **Section 10** of this guide.

Invite Suppliers to a Private Waiver of Competition if Necessary

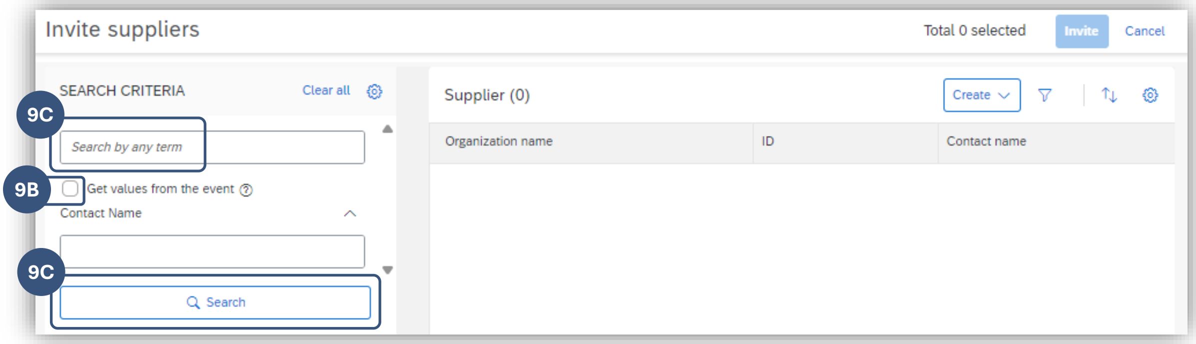
9 If the Sourcing Project Owner is conducting a private solicitation with a limited set of vendors, they will directly invite the identified vendor(s). The solicitation will not post to public eVP, and only the directly invited vendor(s) will be able to respond.

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

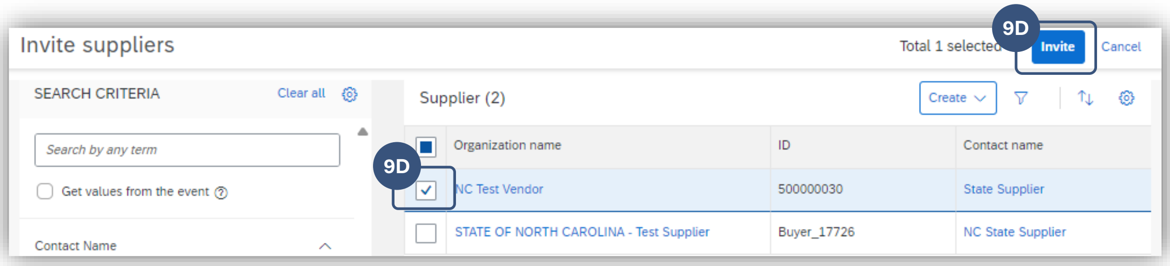


B. On the next **Invite suppliers** page, uncheck the box next to **Get values from the event.**

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**.

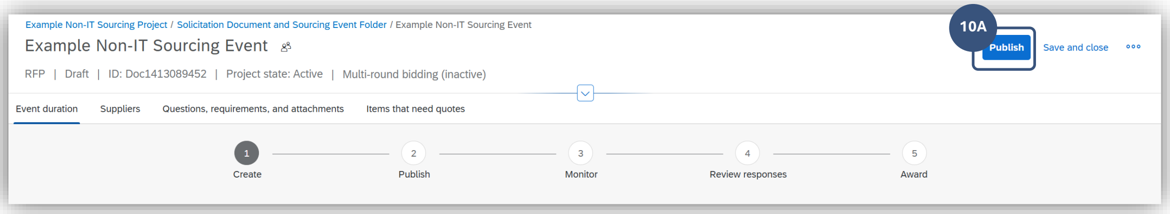


E. If more than one vendor has been approved to participate in the private solicitation, click the **Invite suppliers** again and repeat the process outlined in **steps 9B – D** as many times as necessary to include all approved vendors. The Sourcing Event will not post to public eVP, and only the vendor(s) 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.

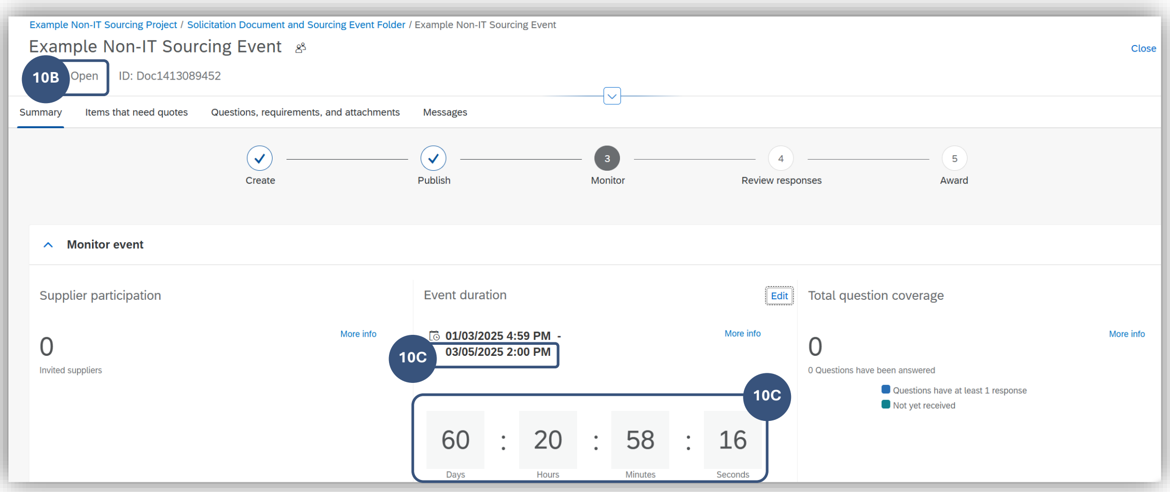
A. Click **Publish** at the top right of the Sourcing Event.



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 04**.