

# NC eProcurement

## Publishing a Sourcing Event (Non-IT)

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.

### I. Create a Sourcing Event

1. Navigate to the **'Documents'** tab of the Sourcing Project and click the down-arrow to the right of the document within the **'Sourcing Event'** folder and click **'Edit'** from the drop-down menu.

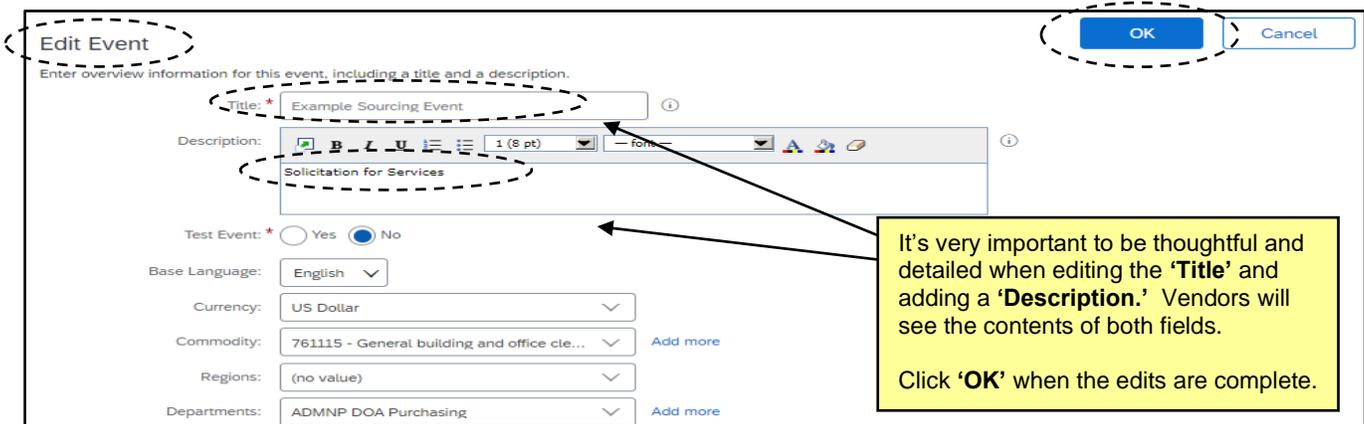
**Notes:**

- This document template will depend upon selections made in the **'Solicitation Vehicle'** field and the answer to the **'Select a template'** question on the **'Create Sourcing Project'** page.
- If the user wishes to access the Event without initiating an edit to copy the **'Doc Number'** for their Solicitation Document, they can select **'View Details'** from the dropdown.



2. 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.

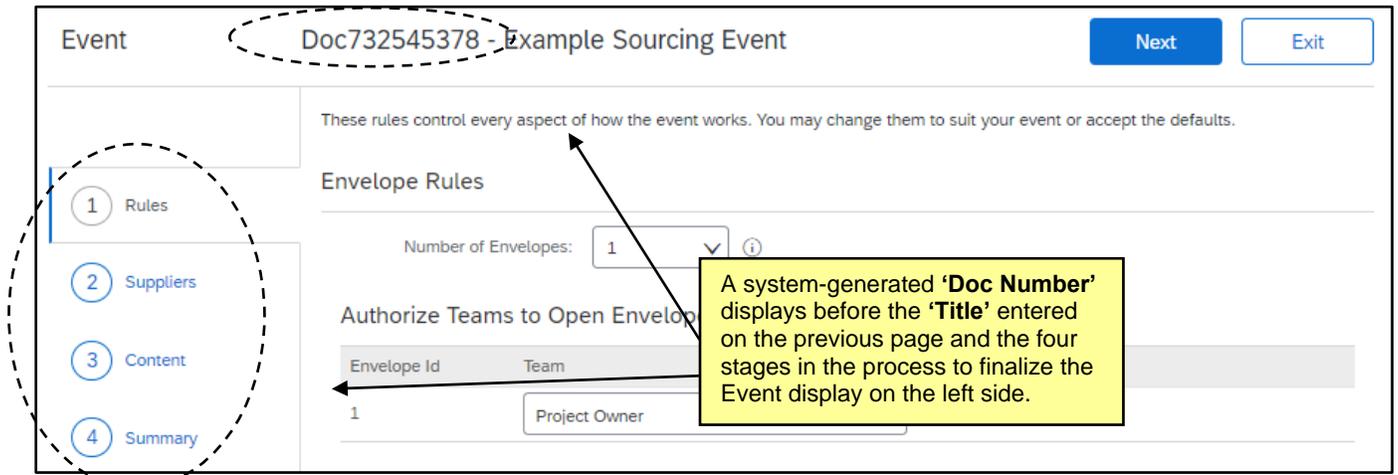
All other fields can be left as defaulted, and **'Currency,' 'Commodity,'** and **'Departments'** will be pre-populated based on selections made when creating the Sourcing Project. Then click **'OK.'**



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

**Notes:**

- Users will skip section 2 for 'Suppliers' until after sections 1 and 3 have been completed and the Sourcing Event has been approved (if necessary). The 'Tasks' tab outlines 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.



## II. Setting Event Rules

The first of the four sections to edit and set are the Event 'Rules.' Most importantly, the rules section allows the Sourcing Agent 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 users leave them as is.

- 'Envelope Rules' is the first subsection. The system will default the 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 response information until after the 'Due Date.' It is advised that the user leaves the default as is, but if they would like a multiple-envelope Event revealing different aspects of the response in layers, they 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.



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 their bids are last 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 Event is finalized by clicking **'Publish.'** If the user 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.

Timing Rules

Response start date: \*  When I Click the Publish button on the Summary page  
 Schedule For the Future:

Due date: \*  Duration: End time explicitly specified  
 Fixed time: 10/1/2021 2:00 PM

Change the **'Due date'** to **'Fixed time'** and select the date and time to match the bidding end time established in the Solicitation Document.

3. It is suggested that users 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.'**

### III. Updating the Sourcing Event Content

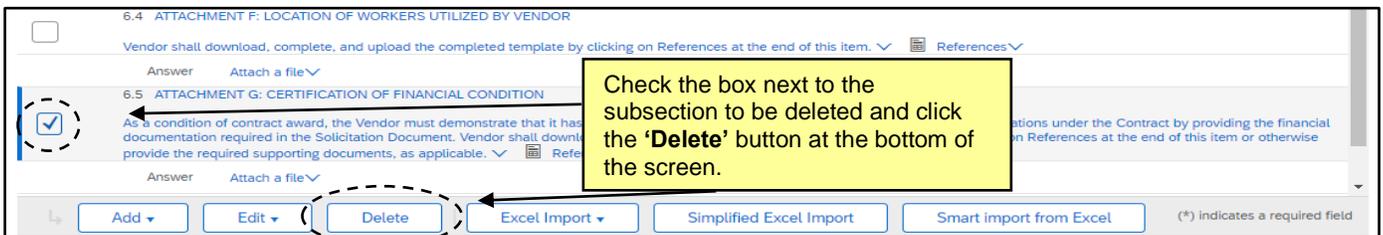
The **'Content'** section of the Event is where the user can share all information about the products or services they wish to receive bids on, and it serves as the framework for vendors to provide a response. The State has created an extensive template in this section that complements the default **'Solicitation Document'** generated on the Sourcing Project, and it is advised that users follow the suggested outline.

1. The **'Content'** stage 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 for 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:** Users will upload their completed **'Solicitation Document'** in subsection 3.1. Vendors will find instructions for submitting questions in subsection 3.2, and pre-loaded, informational attachments in subsections 3.3 and 3.4. If an **'Addendum'** is required, users will post it here and it will become subsection 3.5.
  - 4) **Vendor Information:** This section requires vendors provide their **'Customer Number'** from their NC eVP account.
  - 5) **Pricing Submittal:** By default, the user 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. **'Line Item'** pricing can replace the default attachment response if desired.

6) **Vendor Response:** This section contains several subsections instructing the vendor to return completed documents to accompany their pricing submittal. No action is necessary by users in this section as all of the documents have been provided for the vendors, and most of the response fields are required by default to be completed by the vendor.

**Notes:**

- 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.
  - The final subsection is titled "ADDITIONAL DOCUMENTATION" and provides an optional attachment field for vendors to submit additional relevant documentation.
2. Scroll to **Section 6, 'Vendor Response.'** This section is populated with several subsections (more for **'Goods'** solicitations than for **'Service'** solicitations). These templates auto-populate based on the selection made in the **'Approval Scenario'** field. Most attachment subsections are required for vendors to complete by default. There is no action necessary for users in this section.
  3. This **'Content'** should be complementary to that in the solicitation document, i.e., if an attachment is included in the document, it should be removed from the **'Content'** page. If any changes to the default content are necessary, subsections can be added, edited, or deleted, although users should be very careful when doing this. 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.



4. 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.'**
5. 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,'** but if the user would like to keep the attachment 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.'**



**Notes:**

- If the solicitation is being sent to P&C for approval, users will need to revisit and update this portion of the **'Sourcing Event'** after approval is granted but before publishing.
- If no approvals are necessary, skip the next section of this document.

## IV. Send Solicitation to P&C for Approval

If the solicitation is over agency delegation, it needs to be approved by P&C before publishing. Users will do that via the built-in **'Gain P&C Approval of Sourcing Event'** task in **'Phase 04'** of the **'Tasks'** tab.

- At this point the user should click the **'Exit'** button in the top right to save the Event. The **'Confirm Edit Event Exit'** screen will display providing the user with various options. Clicking **'return to project'** will save the Event as is and take the user to the originating Sourcing Project where they can begin the process to have the Event approved. The bottom option to **'Create saved version'** will save the progress made as a separate version, and the screen will include instructions on how to undo any subsequent changes. The bottom option works if desired but is not advised.

**Confirm Edit Event Exit**

What would you like to do next?

- Continue working on this event.
- View details or return to project.
- Create saved version and exit.

Your edits have automatically been saved as you work. Others cannot edit the event unless you have a saved version.

Prior to publishing, you are allowed to create saved versions or 'checkpoints' of your work on an event. Once you have a saved version, you can undo any subsequent changes by selecting **Actions > Revert to Saved Version** while viewing the event.

NOTE: You can only revert to the last saved version that was created.

Clicking **'return to project'** will save the Event as is and take the user back to the originating Sourcing Project. The bottom option will save the progress made as a separate version and is not advised.

- Navigate to the **'Tasks'** tab on the Sourcing Project and go to the **'Gain P&C Approval of Sourcing Event'** task in **'Phase 04.'** Click on the task and select **'View Task Details'** from the dropdown.
- On the **'Approval Task'** page, click on the word **'Custom'** in the **'Select Approvers'** section, then click **'Add Initial Approver'** on the subsequent screen. Click the dropdown next to **'Add approver to approval flow'** and select **'Search more'** to find the appropriate P&C Service Team to which to send the approval request. On the next screen, type in "P&C Service," click **'Search,'** and check the box next to the Service Team representing the user's entity, then click **'Done.'** For future approvals, the Service Team can be selected directly from the dropdown after clicking **'Add Initial Approver.'**

**Note:** If the value of the Contract entered is over \$300,000, the **'Custom'** link will not appear, and additional P&C approver groups will automatically be added to the approval flow. The user must still add their Service Team as an approver before any other groups by clicking the blue arrow to the left of the leftmost group and selecting it from the dropdown.

**Add to Currently Selected**

Name

<input type="checkbox"/>	Name ↑	ID	Type	Phone	Email Address
<input checked="" type="checkbox"/>	P&C Service Team #1	P&C Service Team #1	Group		
<input type="checkbox"/>	P&C Service Team #2	P&C Service Team #2	Group		
<input type="checkbox"/>	P&C Service Team #3	P&C Service Team #3	Group		
<input type="checkbox"/>	P&C Service Team #4	P&C Service Team #4	Group		

Currently Selected

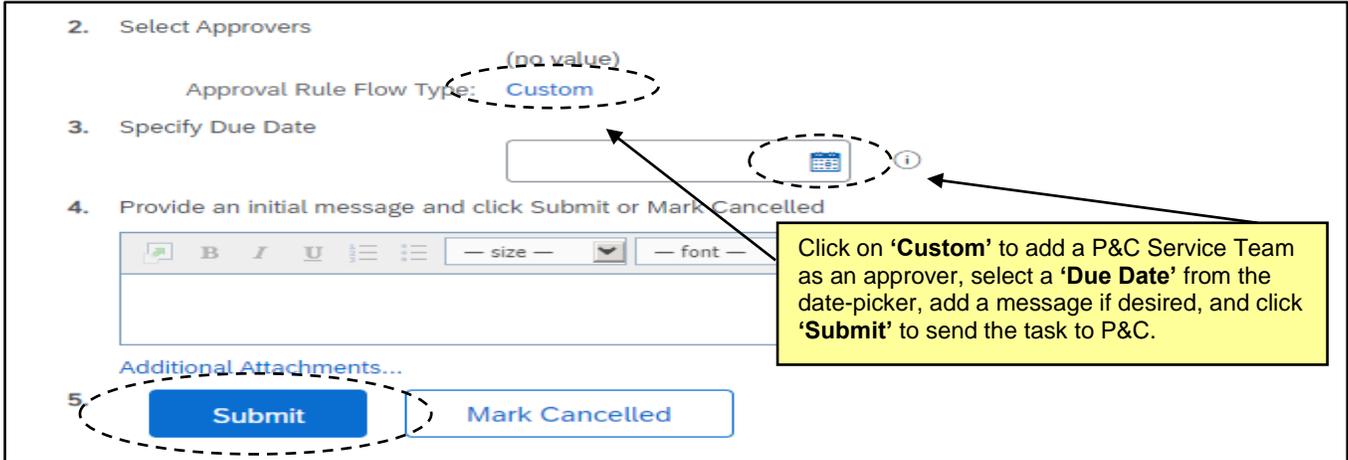
Typing "P&C Service" in the search bar will return all four P&C Service Teams from which to choose by checking the box next to the appropriate one.

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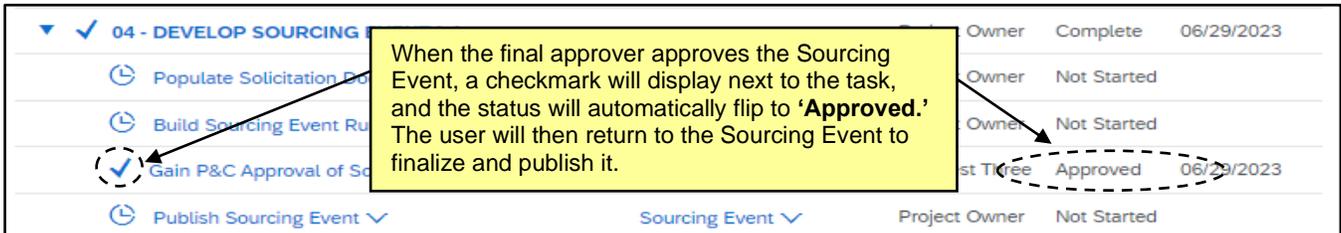
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- Back on the **'Approval Task'** page, add a **'Due Date'** from the date picker, a note to P&C if necessary, and click **'Submit.'**

**Note:** The **'Submit'** button is not accessible if the **'Sourcing Event'** has not been initiated, so make sure that the appropriate documents have been uploaded in the **'Solicitation Documents'** folder and the Event has been updated per the previous three sections of this document.



- On the **'Tasks'** tab, the task status will display as **'In Approval'** until it is completely approved, when it will automatically shift to **'Approved'** and a checkmark will appear to its left. The user can proceed to finalizing their **'Solicitation Document,'** then updating and publishing the **'Sourcing Event.'**



## V. Review the Timing Rules and Finalize the Sourcing Event Content

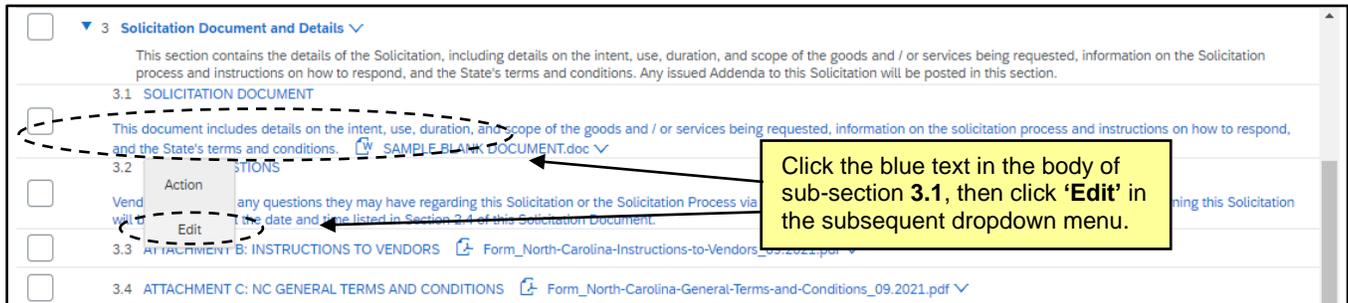
After receiving approval from P&C, users should finalize and PDF their **'Solicitation Document'** then return to **Section 1 (Rules)** of the **'Sourcing Event'** to update any dates that may have changed during the approval process, and **Section 3 (Content)** to attach the final version of the **'Solicitation 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 user directly into **'Edit'** mode, but if accessing the Sourcing Event from the **'Documents'** tab within the Sourcing Project, the user must select **'Edit'** from the dropdown.
- Verify the **'Due date'** under **'Timing Rules'** in **Section 1 (Rules)** has not changed during the 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.

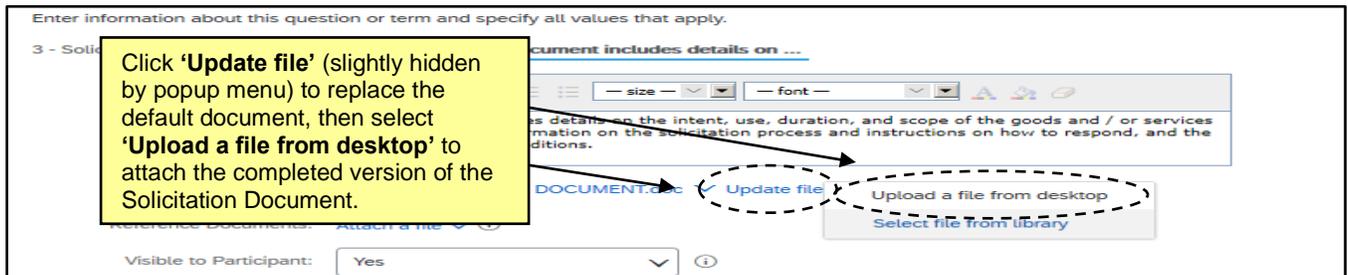
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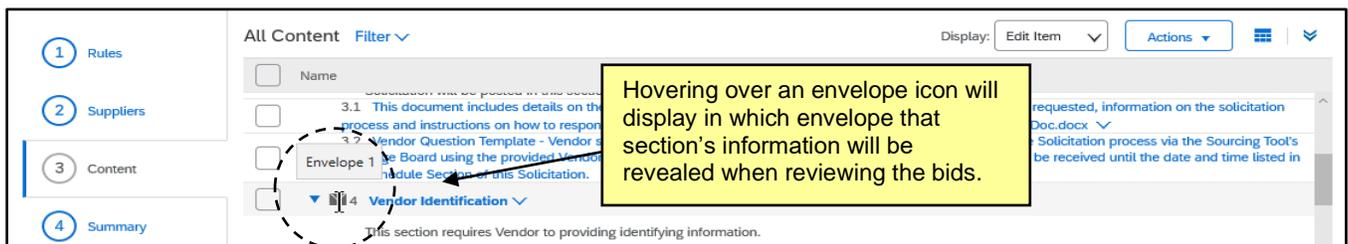
4. Scroll to **Section 3, 'Solicitation Document and Details.'** A **'SAMPLE BLANK DOCUMENT.doc'** is attached to **subsection 3.1** by default. To replace this document, click on the blue text in the body of **3.1** and select **'Edit'** from the subsequent dropdown menu.



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



6. 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.



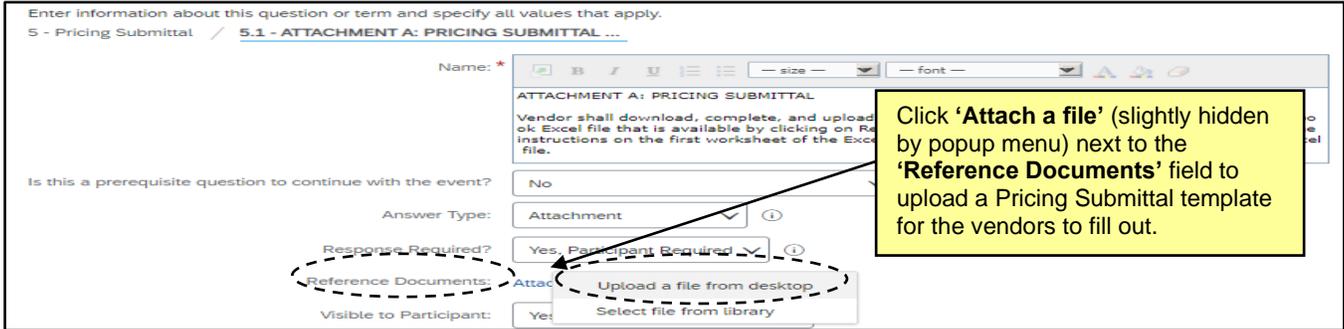
7. In **Section 5, 'Pricing Submittal,'** vendors will attach their pricing responses to the products or services being bid upon. The user must provide a template for vendors to populate. In **subsection 5.1**, duplicate the steps performed in **subsection 3.1** (Step 4) by clicking on the blue text in the body of the subsection and selecting **'Edit'** from the dropdown menu.

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- Navigate to the **'Reference Documents'** field and click the **'Attach a file'** link. Add the Pricing Submittal template the vendor needs to fill out and click **'Done.'** Vendors are instructed to download this template to fill out with their pricing and re-upload it for the user to review.

**Note:** Microsoft Excel is the default format for this attachment. If the user prefers to attach this document in another format, remember to update the wording in the **'Name'** field when adding the attachment.



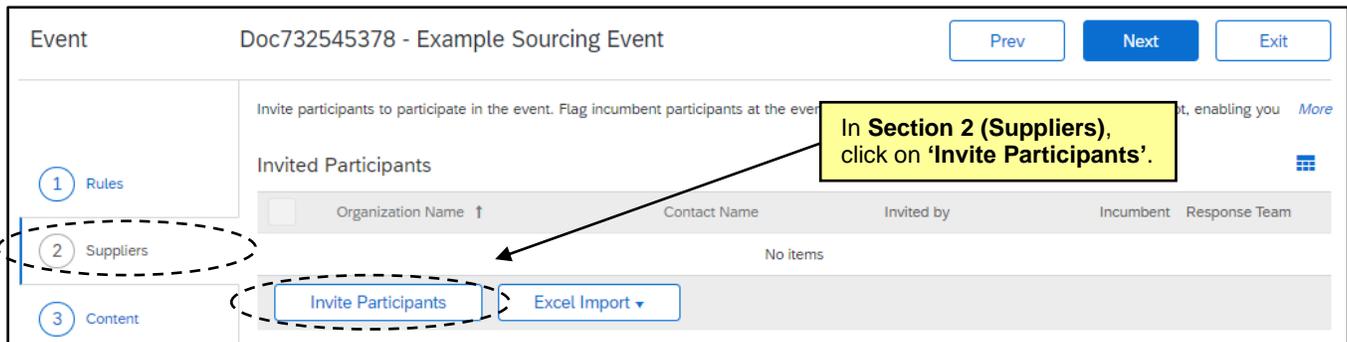
- Users have the ability to add **'Line Items'** directly into the **'Content'** of the Event if they'd prefer vendors provide their pricing response directly into the tool as opposed to attaching it in a document. The benefits of this will be realized when the user compiles response information for the bid tabulation. For further guidance on this process, please see the ['Adding Special Content to a Sourcing Event'](#) job aid.

## VI. Update Suppliers Section of the Event

Once the Rules and Content are finalized, users will be ready to go back to the section they previously skipped, **Section 2 (Suppliers)**. In this section, the user will select the designated **'NC eProcurement Sourcing'** supplier, 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 user has received approval for a **'Procurement Exception – Waiver of Competition'** to conduct an RFQ with a limited set of vendors, they will NOT select the designated **'NC eProcurement Sourcing'** vendor, but rather, directly invite the identified vendor(s) for which approval was granted. 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'**.



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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 V  
QUOTE PUNCHOUT CATALOG  
PURCHASE ORDER  
SOURCING  
BIDDING  
BUY

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**'.

Participant Search

Search Filter

NC eProcurement Sourcing

Contact Name

Reset Search

Search Results

1 result(s) found

<input type="checkbox"/>	Organization Name	Contact Name	Business Email Address
<input checked="" type="checkbox"/>	NC eProcurement Sourcing	NC eProcurement	ncep.test@doa.nc.gov

OK Cancel

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 Event so that it can be automatically posted to Public eVP.

**Note:** If an RFQ is being conducted after a '**Procurement Exception – Waiver of Competition**' was approved by P&C, the user should search for and invite the approved vendor to add them to '**Suppliers**' tab of the Event. 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. The Event will not post to Public eVP, and only the vendor(s) selected will receive an email with a link to respond to the Event.

Event Doc732545378 - Example Sourcing Event

Prev Next Exit

Invite participants to participate in the event. Flag incumbent participants at the event level and the incumbency flag will be set for each lot, enabling you [More](#)

Invited Participants

<input type="checkbox"/>	Organization Name	Contact Name	Business Email Address	Response Team
<input checked="" type="checkbox"/>	NC eProcurement Sourcing			Yes

Remove Set/Clear Compare Invite Another Participant Excel Import

1 Rules  
2 Suppliers  
3 Content  
4 Summary

## VII. Summary Section and Publishing the Event

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

1. The '**Overview**' information is at the top of the page, above the '**Rules**,' '**Suppliers**,' and '**Content**' information in descending order. 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 Event in the form of a MS Word document, click the '**Actions**' button and select '**Print Event Information**,' and the system will generate an up-to-date, time-stamped document.

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3. The user can now click the **'Publish'** button to finalize the Event.

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

5. Upon returning to the Event, the user 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,'** although 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 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.

Doc732545378 - Example Sourcing Event

Time remaining 17 days 02:26:31

Overview Content Suppliers Messages Log Award

Overview

ID: Doc732545378  
Description: Solicitation for Services  
Status: Open  
Version: v3

Creation Date: 06/23/2023  
Access Control: (No additional restrictions)

Actions

Users can navigate between different tabs at the top of the screen. This is the **'Overview'** tab.

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 users 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 user 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.