

# NC eProcurement

## Responding to a Sourcing Event

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When a vendor learns of a bid opportunity with the State of North Carolina via an IPS posting, they can follow an embedded URL link to a public posting summary on Ariba Discovery. Vendors with an Ariba Network account can then respond to the Solicitation by accessing the **'Sourcing Event,'** which is an electronic collection of all the requisite details provided by the State's Sourcing Agent, and a template into which a vendor can respond with answers and attachments.

### I. Ariba Discovery Public Posting

IPS will direct vendors to the Public Posting for the **'Sourcing Event'** on Ariba Discovery. Vendors do not need an Ariba Network account to see this page.

1. The **'Title'** of the Event will be listed in the top left of the Public Posting.
2. **'State of North Carolina'** will display below that indicating that this Event is for a Solicitation from a State Agency.
3. Bid Timing information will display below that, alerting the user to important timing specifications, such as when bidding opens and closes.

**Note:** The actual time for the **'Response Deadline'** may be different than what is listed on this page. Ariba Discovery postings default to an uneditable closing time of **'11:59 PM EST'** on the due date. It will be common for State Sourcing Agents to set a time earlier in the day in their Sourcing Event. Sourcing Agents are instructed to note the actual closing time in the **'Posting Summary'** field towards the bottom of this page, and it should be clear exactly what that is once the user selects to Respond to this posting.

4. The **'Public Posting'** field will list the URL for the page that is currently displayed.
5. **'Product and Service Categories'** and **'Ship-to or Service Locations'** are the values that will trigger a Discovery User to see this posting in the **'My Leads'** section of their Ariba Network homepage.
6. The **'Posting Summary'** field will include a brief description by the State's Sourcing Agent as to the overall nature of the Solicitation, and this should match what was posted in IPS.

**Note:** If the actual time for the **'Response Deadline'** is not **'11:59 PM EST,'** the Sourcing Agent should include a note here of what the actual cutoff time is that day, and no responses will be accepted after that earlier time despite what is listed on this page.

7. If the vendor has questions for the State's Sourcing Agent, they should NOT use the **'Questions & Answers'** section at the bottom of the page. At this point they should reach out to the Sourcing Agent via the information posted in IPS. If they choose to respond to the Solicitation, there will be additional avenues for communication built into the Sourcing Event.
8. If the user decides they would like to respond to this solicitation request with a bid, they will click the orange **'Respond to Posting'** button. If they are already logged into their Ariba Network account, they will be taken directly to the Sourcing Event. If they are not, they will be taken to the Login page before being redirected to the Sourcing Event. If they do not have an Ariba Network account, they can create one so that they will be able to respond to this Solicitation via the Sourcing Event. For more information on creating an account, please see the ['Accessing the Ariba Network'](#) Job Aid.

# NC eProcurement

## Responding to a Sourcing Event

This is a public sector / buyer funded posting and you can respond for free

**DISCOVERY TESTING 10132020**

State of North Carolina

Posted On: 13 Oct 2020  
Open for bidding on: 13 Oct 2020  
Response Deadline: 31 Dec 2020 8:59 PM PST

Respond to Posting Add to Watchlist Not Interested | Share: f t in e

Opportunity Amount: **Less than \$1000 USD**  
Response Deadline: 31 Dec 2020 8:59 PM PST  
(Buyers can close postings early)  
Posting ID: 9090239(Doc100823293)  
Posting Type: Request for Information  
Public Posting: <http://discovery.ariba.com/rfx/9090239>

Product and Service Categories  
• Cleaning machines for seed or grain or dried leguminous vegetables

Ship-to or Service Locations  
• North Carolina - United States

**Posting Summary**  
DISCOVERY TESTING 10132020 - DO NOT RESPOND  
NOTE: Actual Closing Time on 31 Dec 2020 is 1:30 PM EST

Questions & Answers  
Ask Buyer a question...

## II. The Sourcing Event Overview

Once the user clicks on **'Respond to Posting,'** they will be directed to the Sourcing Event where they can review the details of the Solicitation and provide a response to the Sourcing Agent for their consideration.

1. The top of the Sourcing Event will display the event title and a countdown clock of the time remaining for vendors to submit their bid. Despite what may have been listed (11:59 PM EST) in the Ariba Discovery Public Posting, the timing in the top right will be the official deadline, down to the second.
2. The left side of the screen will provide a **'Checklist'** of the steps to be taken when responding to this Solicitation. Users can **'Review Event Details'** by clicking on the numbered **'Event Content'** sections below to change the view of what's on their screen. A subsequent screen will show all of this information in great detail all together.
3. The next step will be to **'Review and Accept Prerequisites,'** which represents the bidder agreement, and acceptance of these is required to submit a bid.
4. Additionally, the **'Download Content'** button will allow the user to download Event information in a detailed Excel document, as well as download any attachments the Sourcing Agent included in this Event. The user can click **'Decline to Respond'** if they do not wish to submit a bid for the Solicitation, but do wish to let the Sourcing Agent know they saw the posting, and the **'Print Event Information'** button will export Event information into a Word document.

# NC eProcurement

## Responding to a Sourcing Event

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

### Event Details

Doc114057374 - Example Sourcing Event

Time remaining  
14 days 02:14:46

Event Messages  
Download Tutorials  
Response Team

**Checklist**

1. Review Event Details
2. Review and Accept Prerequisites
3. Submit Response

**Event Contents**

All Content

1. Welcome to the State...
2. Instructions on How ...
3. Solicitation Document...

Review and respond to the prerequisites. Prerequisite questions must be answered before you can view event content or participate in the event. Some prerequisites may require the owner of the event to review and accept your responses before you can continue with the event. If you decline the terms of the prerequisites, you cannot view the event content or participate in this event.

Download Content **Review Prerequisites** Decline to Respond Print Event Information

Welcome to the State of North Carolina's Sourcing Tool (Section 1 of 7) Next

Name

1 Welcome to the State of North Carolina's Sourcing Tool More...

Next Section: Instructions on How ...

Event Overview and T

Own

Event Ty

Currency: US Dollar

Commod

Act Mont

Contract Effective D

Click 'Review Prerequisites' to accept the bidder agreement and continue the process of submitting a bid.

'Checklist' of steps to take and Content Section

Countdown clock indicating time remaining for bids to be accepted.

- After clicking 'Review Prerequisites,' the bidder agreement is displayed, and the user must accept the terms to move forward with their bid.

### Prerequisites

Doc114057374 - Example Sourcing Event

**Checklist**

1. Review Event Details
2. Review and Accept Prerequisites
3. Submit Response

Prerequisites must be completed prior to participation in the event.

In consideration of the opportunity to participate in on-line events ('On-Line Events') held and conducted by the company sponsoring this On-Line Event ('Sponsor') on the web site (this 'Site') hosted by Ariba, Inc. ('Site Owner'), your company ('Participant' or 'You') agrees to the following terms and conditions ('Bidder Agreement'):

- 1. Bids.** If You are invited to participate in the On-Line Event, Sponsor reserves the right to amend, modify or withdraw this On-Line Event. Sponsor reserves the right to accept or reject all or part of your proposal. Submission of a bid does not create a contract or any expectation by Participant of a future business relationship. Rather, by submitting a bid, you are making a firm offer which Sponsor may accept to form a contract, subject to section 2 below. Sponsor is not liable for any costs incurred by Participant in the preparation, presentation, or any other aspect of Participant's bid.
- 2. Price Quotes.** Except to the extent Sponsor allows a non-binding bid, all Bids which Participant submits through the On-Line Events are legally valid quotations without qualification, except for data entry errors.
- 3. Procedures and Rules.** Participant further agrees to be bound by the procedures and rules established by the Site and Sponsor.
- 4. Confidentiality.** Participant shall keep all user names and passwords, the On-Line Event content, other confidential materials provided by the Site and/or Sponsor, and all bids provided by You or another participating organization in confidence and shall not disclose the foregoing to any third party.
- 5. Bids through Site only.** Participant agrees to submit bids only through the on-line bidding mechanism supplied by the Site and not to submit bids via any other mechanism including, but not limited to, post, courier, fax, E-mail, or orally unless specifically requested by Sponsor.
- 6. Ethical Conduct.** All parties will prohibit unethical behavior and are expected to notify the Site Owner by contacting the appropriate project team if they witness practices that are counter-productive to the fair operation of the On-Line Event. If Participant experiences any difficulties during a live On-Line Event, Participant must notify Site Owner immediately.
- 7. Survival.** The terms and conditions of this Bidder Agreement shall survive completion of the On-Line Event.

\*\*\*\*  
BA v1.1 19Aug05

☐ I accept the terms of this agreement.

☒ I do not accept the terms of this agreement.

OK Cancel

Accept the bidder terms displayed above and click 'OK.'

# NC eProcurement

## Responding to a Sourcing Event

6. Once the terms have been accepted, the entirety of the Event content will display. This is where all important information for vendors to consider when placing a bid will be located, as well as instructions on how to place the bid specific to this Solicitation.
7. The Sourcing Event content will be broken down into numbered sections, typically as follows:
  - 1) **Welcome to the State of North Carolina's Sourcing Tool:** A welcome message and outline of the overall process for submitting a bid. No action is required in this section.
  - 2) **Instructions on How to Use the Sourcing Tool:** Instructions, tips, and links to resources for help in submitting a bid. No action is required in this section.
  - 3) **Solicitation Document and Details:** In this section vendors will find the '**Solicitation Document**' that includes the important, specific details about the Solicitation to which they will respond with a bid. They can also find the '**Vendor Question Submission Template**' that can be used to ask questions to the Sourcing Agent, and any '**Addenda**' to the Solicitation will also be posted here if necessary. This is the first section that will have subsections.
  - 4) **Vendor Information:** In this section vendors will provide their NC eVP '**Customer Number**.'


**Note:** This is found by logging into eVP and going to the '**Company Information**' section.

- 5) **Pricing Submittal:** Vendors will download an attachment, fill it out with their pricing information, and reattach it for the Sourcing Agents to review.
- 6) **Vendor Response:** This section contains questions about the vendor, some required and some optional, that the Sourcing Agent will consider along with the pricing submittal when reviewing all bids.
- 7) **Additional Questions to Vendor:** This section, if present, contains additional questions for the vendor to answer.

**Note:** The exact content in each of these sections – or the titles of the sections themselves – may differ based on the type of Solicitation posted by the State's Sourcing Agent. An **IT Solicitation** will be structured slightly different than a **Non-IT Solicitation**, and the exact structure of a **Solicitation for Goods** will differ slightly from that of a **Solicitation for Services**. It is extremely important that vendors responding to Solicitations pay close attention to the exact structure and questions posed in that specific Sourcing Event, as they could differ slightly from those posed in a separate Event to which they have responded for the State.

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

## Sections 1 and 2 are strictly informational.

Less... 

p responses, upload documents, and submit offers to the State, Vendors should go to the following site:

Section 3 and those below it have subsections that include information and documents for the vendor to download to get a full understanding of the type of bid the State's Sourcing Agent is looking for. As well, there are fields into which vendors can submit their bid information and answer questions for the Sourcing Agent to consider when they're evaluating all submitted bids.

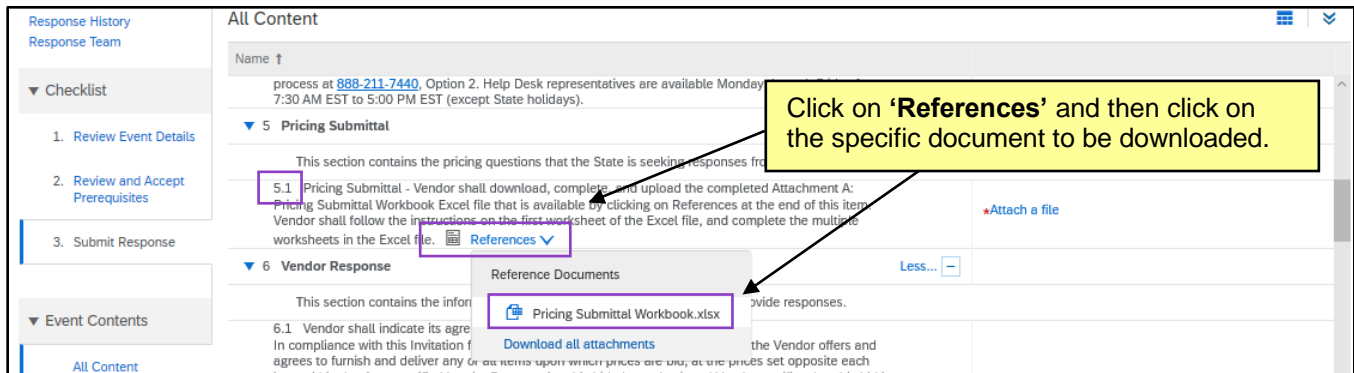
In Section 3.1, click on and download the attached document, which will be the very-important '**Solicitation Document**' that will be customized for this specific Solicitation.



# NC eProcurement

## Responding to a Sourcing Event

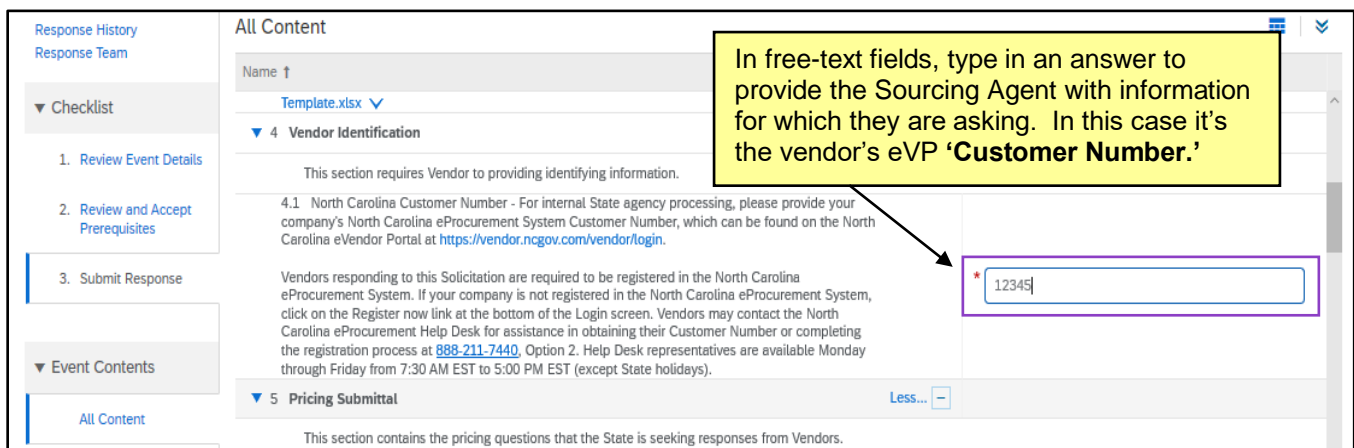
3. Other subsections may have a **'References'** section following their text. Vendors can find important documents to download here, as well. A specific example of this is in subsection 5.1 in below screenshot which contains the **'Pricing Submittal Workbook'** for the vendor to download, fill out, and reattach.
4. Click on **'References'** highlighted in blue text at the end of the subsection and select the specific document to download. If there are multiple documents to download, the user may click **'Download all attachments.'**



## IV. Providing a Bid Response via Answers and Attachments

Beginning in Section 4, as the vendor scrolls down the Content section of the Sourcing Event, there will be fields into which they can provide answers to questions or upload attachments. Answers in some of those fields will be entered with free-text while others will be answered via drop-down. A red asterisk (\*) to the left of a field will indicate that an answer is required. If a vendor attempts to submit a bid without having completed all required fields, the system will display an error message and direct the vendor to the incomplete field(s).

1. Subsection 4.1 is the first field into which an answer can be provided. This is a free-text field and is required, as designated by the red asterisk.
2. The vendor should type their eVP **'Customer Number'** into this field.



# NC eProcurement

## Responding to a Sourcing Event

- Subsection 6.1 is the next field into which an answer can be provided. This answer is required and must be provided via a drop-down menu.
- The vendor should carefully read all the text in subsection 6.1 and then click the drop-down arrow next to **'Unspecified'** to display additional options. Choose the one that best answers the question.

**Note:** This specific question requires an answer of **'Yes,'** but that is not true of all questions in this format.

Response History  
Response Team

▼ Checklist

1. Review Event Details
2. Review and Accept Prerequisites
3. Submit Response

▼ Event Contents

All Content

1. Welcome to the State...
2. Instructions on How...
3. Solicitation Document...

All Content

Name ↑

worksheets in the Excel file. [References](#)

▼ 6 Vendor Response

This section contains the information that the State is asking the Vendors to provide responses.

6.1 Vendor shall indicate its agreement to the following:  
In compliance with this Invitation for Bids, and subject to all the conditions herein, the Vendor offers and agrees to furnish and deliver any or all items upon which prices are bid, at the prices set opposite each item within the time specified herein. By executing this bid, the undersigned Vendor certifies that this bid is submitted competitively and without collusion (G.S. 143-54), that none of its officers, directors, or owners of an unincorporated business entity has been convicted of any violations of Chapter 78A of the General Statutes, the Securities Act of 1933, or the Securities Exchange Act of 1934 (G.S. 143-59.2), and that it is not an ineligible Vendor as set forth in G.S. 143-59.1. False certification is a Class I felony. Furthermore, by executing this bid, the undersigned certifies to the best of Vendor's knowledge and belief, that it and its principals are not presently debarred, suspended, proposed for debarment, declared ineligible or voluntarily excluded from covered transactions by any Federal or State department or agency. As required by G.S. 143-48.5, the undersigned Vendor certifies that it, and each of its sub-Contractors for any Contract awarded as a result of this Solicitation, complies with the requirements of Article 2 of Chapter 64 of the NC General Statutes, including the requirement for each employer with more than 25 employees in North Carolina to verify the work authorization of its employees through the federal E-Verify system. G.S. 133-32 and Executive Order 24 (2009) prohibit the offer to, or acceptance by, any State Employee associated with the preparing plans, specifications, estimates for public Contract; or awarding or administering public Contracts; or inspecting or supervising delivery of the public Contract of any gift from anyone with a Contract with the State, or from any person seeking to do business with the State. By execution of this bid response to the Solicitation, the undersigned certifies, for Vendor's entire organization and its employees or agents, that Vendor are not aware that any such gift has been offered, accepted, or promised by any employees or agents of Vendor's organization.

Failure to answer Yes to this question shall render bid invalid and it WILL BE REJECTED.

Click the drop-down arrow next to **'Unspecified'** for additional options to answer the question and select the best one.

\* Unspecified ▼

Yes

No

Unspecified

- The vendor can click the blue **'Quote Bubble Plus'** icon next to the answer field if a comment or optional attachment would provide the Sourcing Agent with additional important information related directly to that question. On the subsequent **'Add/Edit Comment'** screen, type in a comment or add an attachment, then click **'OK.'**

All Content

1. Welcome to the State...
2. Instructions on How...

proposed for debarment, declared ineligible or voluntarily excluded from covered transactions by any Federal or State department or agency. As required by G.S. 143-48.5, the undersigned Vendor certifies that it, and each of its sub-Contractors for any Contract awarded as a result of this Solicitation, complies with the requirements of Article 2 of Chapter 64 of the NC General Statutes, including the requirement for each employer with more than 25 employees in North Carolina to verify the work authorization of its employees through the federal E-Verify system. G.S. 133-32 and Executive Order 24 (2009) prohibit the offer to, or acceptance by, any State Employee associated with the preparing plans, specifications, estimates for public Contract; or awarding or administering public Contracts; or inspecting or supervising delivery of the public Contract of any gift from anyone with a Contract with the State, or from any person seeking to do business with the State. By execution of this bid response to the Solicitation, the undersigned certifies, for Vendor's entire organization and its employees or agents, that Vendor are not aware that any such gift has been offered, accepted, or promised by any employees or agents of Vendor's organization.

Click the **'Quote Bubble Plus'** icon to add a comment or optional attachment related directly to this question.

\* Unspecified ▼

Yes

No

Unspecified

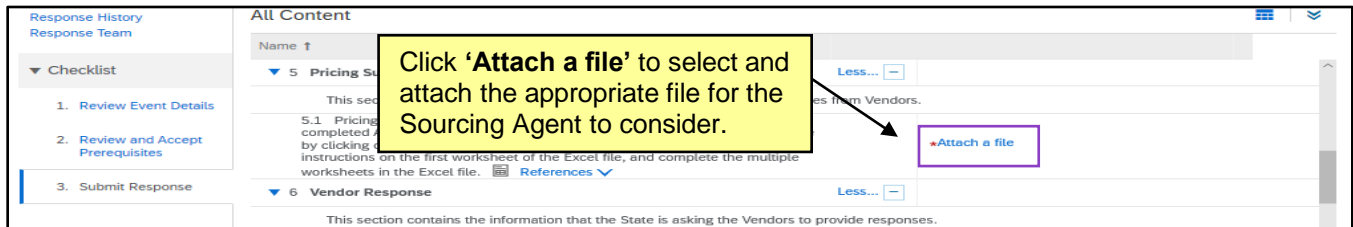
- The vendor should continue scrolling down the page and provide answers for all required questions, and any optional ones for which they feel they have relevant feedback to provide to the Sourcing Agent.
- Some subsections ask the vendor to provide information via attachments. This will be indicated by blue text in the answer section on the right reading **'Attach a file.'** Sometimes these attachments are required, as indicated by a red asterisk, and other times they are optional. Subsection 5.1 is the first place where an attachment from the vendor is requested. In this case it's the **'Pricing Submittal Worksheet'** that the vendor previously downloaded and filled out to provide back to the Sourcing Agent.

# NC eProcurement

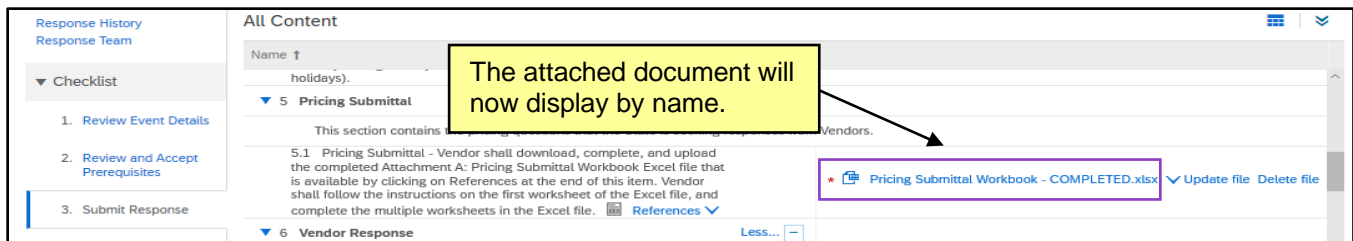
## Responding to a Sourcing Event

- Click on **'Attach a file,'** and on the subsequent **'Add Attachment'** screen, the vendor should browse and select the appropriate file to attach from their desktop, then click **'OK.'**

**Note:** It is important to verify that any attachments can be opened by the Sourcing Agent. The file size limit is 100MB.



- Once the file is attached, it will display by name where **'Attach a file'** used to display. If the wrong file was attached, click **'Update a file'** to replace it, or click **'Delete file'** to remove it.

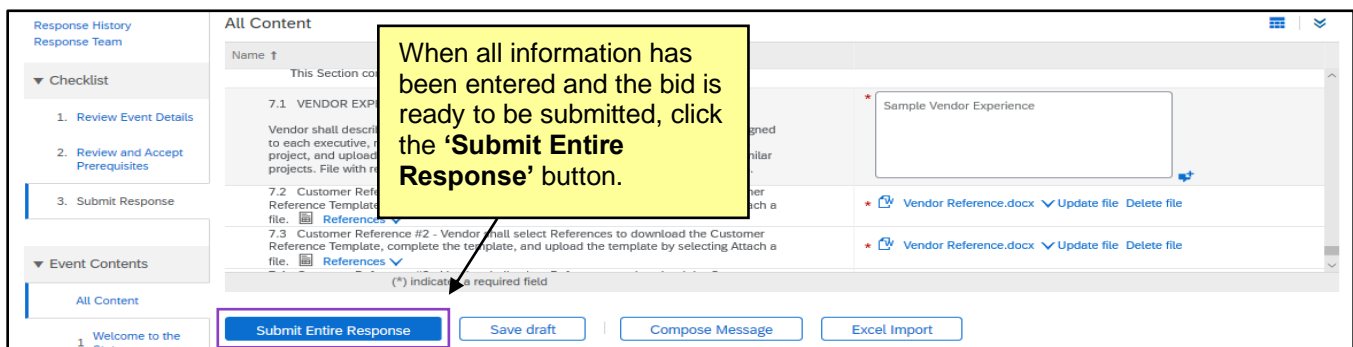


## V. Submitting a Bid Response

- When all questions have been answered and attachments have been uploaded, the vendor should carefully review their answers for accuracy, scroll to the bottom of the screen, and click the **'Submit Entire Response'** button if they are ready to send their bid to the Sourcing Agent for consideration. If there is still more work to be done and the bid is not ready to be submitted quite yet, the user can click **'Save draft'** and return to complete the response portion at a later time.

### Notes:

- It is advised that bids responses be submitted 48 hours prior to the bid **'Due Date'** time, and that vendors open all attachments to check that they are accurate and readable before submitting.
- If a vendor needs to submit separate bid responses to the same Sourcing Event for multiple subsidiaries (NOT alternative bids from the same vendor) to be evaluated separately against each other, they should create separate Ariba Network accounts for each subsidiary. For more information on creating accounts, please see the ['Accessing the Ariba Network'](#) job aid.





# NC eProcurement

## Responding to a Sourcing Event

2. If any required information is missing, an error notification will prevent submission and alert the user to the specific issue that needs to be corrected. The vendor should fill those out and then click **'Submit Entire Response'** again.

An error message at the top of the screen will alert the user to any required fields that have not been completed, and a red box will highlight that specific field down the page.

3. Once a bid has been successfully submitted, a note at the top will read "You have submitted a response for this event. Thank you for participating." That and a visible **'Revise/Alternative Response'** button will confirm that your bid has been submitted. As well, users can click on 'Response History' in the top left of the screen to see the exact timing of when bids were submitted and accepted.

The bid submittal success notification at the top of the screen as well as the **'Revise/Alternative Response'** button will confirm that the bid has been successfully submitted. Clicking on **'Response History'** will provide further specific details about when the bid was submitted.

4. The **'Response History'** page will display if the vendor clicks **'Response History.'**

Details on the status, timing, and specific submitter of the response can be found on the **'Response History'** page.

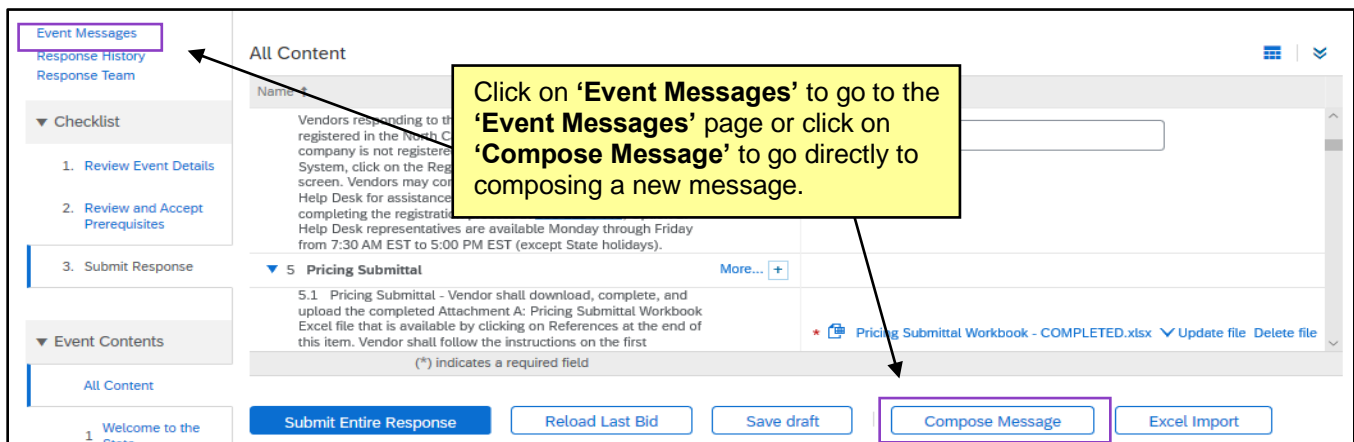
Reference Number	Submitted For	Submitted By	Status	Submission Time	Time Created ↓
ID35553406	State Supplier	State Supplier	Accepted	11/10/2020 03:48:06 PM	11/10/2020 03:48:07 PM

### VI. Asking Questions via the Message Board

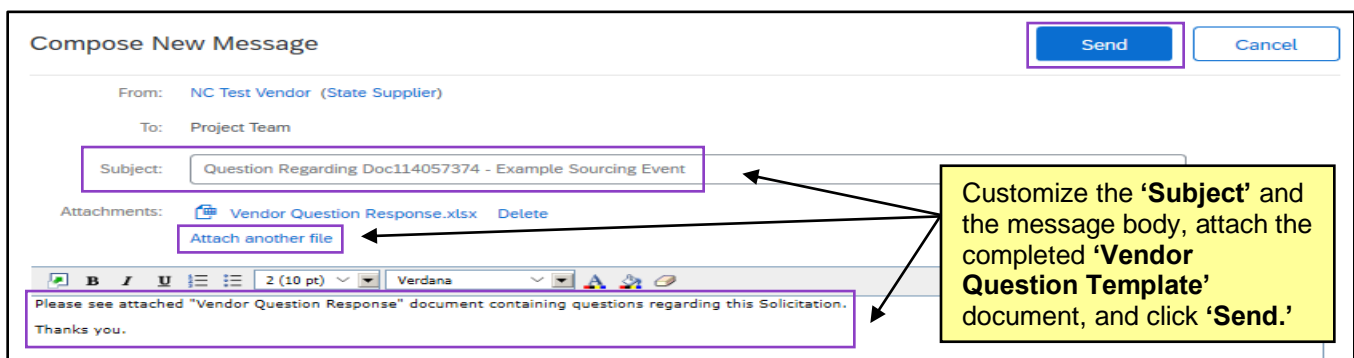
Vendors may ask questions to the Sourcing Agent up until the deadline listed for a question and answer period in the Solicitation Document. Per subsection 3.2, they are instructed to use the **'Vendor Question Template'** and communicate via the **'Event Messages'** page.

**Note:** This is NOT the case for vendors responding to Solicitations from the Department of Information Technology for Statewide IT Procurement contracts. In those instances, please read the **'Solicitation Document'** carefully and follow the instructions to submit questions to the Sourcing Agent outside of this tool.

1. To submit a question to a Sourcing Agent, vendors should download and open the **'Vendor Question Template'** provided in subsection 3.2, follow the instructions provided at the top of that Excel workbook, enter any questions, and save the document to their desktop.
2. To access the **'Event Messages'** page, click the **'Event Messages'** link in the top left of the screen, or to create a message immediately, click the **'Compose Message'** button at the bottom of the screen.



3. The **'Event Messages'** page will display all outgoing and incoming messages relating to the Sourcing Event. Some messages will be solely between the Sourcing Agent and the vendor, while other messages from the Sourcing Agent will have gone to all vendors who have responded to the Event. Click on **'Back to Console'** to return to the Event overview or click **'Compose Message'** to create and submit a question to the Sourcing Agent.
4. The **'Compose New Message'** page will display. Following the instructions on the **'Vendor Question Template'**, enter a descriptive **'Subject'** and include a message to the Sourcing Agent. Click on **'Attach a file'** and upload the **'Vendor Question Template'** then click **'Send.'**



# NC eProcurement

## Responding to a Sourcing Event

- The outgoing message will display on the **'Event Messages'** page with details including a time stamp and a paperclip icon signifying to both the recipient and the sender that the message includes an attachment. Clicking on the icon will allow users to download the attachment if necessary.

Messages

	Id	Reply Sent	Sent Date ↓	From	Contact Name	To	Subject
<input checked="" type="radio"/>	MSG3991421	No	11/10/2020 05:12 PM	NC Test Vendor	State Supplier	SourcingTrainer03	Question Regarding Doc114057374 - Example Sourcing Event
<input type="radio"/>	MSG3991417	Not Applicable				SourcingTrainer03	Response (ID=ID35553406) in event Example Sourcing Event has I
<input type="radio"/>	MSG3994299	Not Applicable			er03 State Supplier		NC eProcurement - TEST has invited you to participate in an even

View Reply Compose Message Download all attachments

- If the Sourcing Agent replies, the message will display at the top of the **'Event Messages'** page. Clicking the radio button to the left of the message will reveal the **'View'** and **'Reply'** buttons.

Messages

	Id	Reply Sent	Sent Date ↓	From	Contact Name	To	Subject
<input checked="" type="radio"/>	MSG3991421.1	No	11/10/2020 05:21 PM	NC eProcurement - TEST	SourcingTrainer03	Participants (1) Team (1)	RE: Question Regarding Doc114057374 - Example Sourcing
<input type="radio"/>	MSG3991421	No	11/10/2020 05:12 PM	NC Test Vendor	State Supplier	SourcingTrainer03	Question Regarding Doc114057374 - Example Sourcing E
<input type="radio"/>	MSG3991417	Not Applicable	11/10/2020 03:17 PM			SourcingTrainer03	Response (ID=ID35553406) in event Example Sourcing E
<input type="radio"/>	MSG3994299	Not Applicable	11/10/2020 11:11 AM		er03 State Supplier		NC eProcurement - TEST has invited you to participate in

View Reply Compose Message Download all attachments

Back to Console

- Clicking **'View'** will show the message details including the previous message to which the Sourcing Agent replied. Click **'Done'** to go back to the **'Event Messages'** page, or **'Reply'** to respond to the Sourcing Agent.

View Message

Done Reply

Id: MSG3991421.1

From: NC eProcurement - TEST (SourcingTrainer03)

Sent: 11/10/2020 05:21 PM

To: Project Team; NC Test Vendor(State Supplier); NC eProcurement - TEST(SourcingTrainer03)

Subject: RE: Question Regarding Doc114057374 - Example Sourcing Event

Thank you for your question. I will follow up with more details soon.

Id: MSG3991421  
Sent: 11/10/2020 05:12 PM  
Subject: Question Regarding Doc114057374 - Example Sourcing Event

Please see attached "Vendor Question Response" document containing questions regarding this Solicitation.

Thanks you.

# NC eProcurement

## Responding to a Sourcing Event

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

### VII. Finding and Responding to an Addendum

If a Sourcing Agent needs to issue an Addendum to the original Sourcing Event, whether following a question from a vendor or for any other reason, they will fill out a document detailing the changes and post that document into Section 3 of the Sourcing Event. They are also encouraged to notify any vendors who have already submitted a bid response that an Addendum has been issued, and this notification should come via an **'Event Message'** as well as an email to the address on file for the responding vendor account.

If a vendor has not yet responded with a bid by the time an Addendum is posted, they should just take the addendum into account when submitting their initial bid. If they have already responded and wish to revise their bid based on new information, they can initiate an update by clicking the **'Revise/Alternative Response'** button.

1. Vendors who have submitted a response should be notified anytime the Sourcing Event is updated via the **'Event Messages'** page. The message subject should indicate that the **'Sourcing Event has changed.'** Vendors should also receive this message via email.

Id	Reply Sent	Sent Date	From	Contact Name	To	Subject
MSG3994353	No	11/10/2020 06:09 PM	NC eProcurement - TEST	SourcingTrainer03	State Supplier	Event Example Sourcing Event has changed.
MSG3991421.1	No	11/10/2020 05:21 PM	NC eProcurement - TEST	SourcingTrainer03	Participants (1) Team (1)	RE: Question Regarding Doc114057374 - Example S
MSG3991421	No	11/10/2020 05:12 PM	NC Test Vendor	State Supplier	SourcingTrainer03	Question Regarding Doc114057374 - Example So
MSG3991417	Not Applicable	11/10/2020 03:48 PM	NC Test Vendor	State Supplier		
MSG3994299	Not Applicable	11/10/2020 11:04 AM	NC eProcurement - TEST	SourcingTrainer03		

2. Clicking **'View'** will provide more details about the change, in this case indicating that an Addendum has been added to subsection 3.3. If viewing via email, the vendor can click a hyperlink to take them directly from the email to the Sourcing Event (Note: they'll be directed to a log in page first).

View Message

Id: MSG3994353

From: NC eProcurement - TEST (SourcingTrainer03)

Sent: 11/10/2020 06:09 PM

To: Participants; NC Test Vendor(State Supplier)

Subject: Event Example Sourcing Event has changed.

Ariba event Doc114057374 Example Sourcing Event has changed.

Message from SourcingTrainer03, NC eProcurement - TEST: Please note that an addendum has been attached to this Event in Section 3.3. Please review the new documentation and adjust your responses if necessary.

To view the event, please access <https://s3.ariba.com/Sourcing/Main/ad/webjumper?realm=ncgov-T&passwordadapter=SourcingSupplierUser&itemID=NWz0APjCzWbSbp&awcharset=UTF-8>. After you log on view the Event details.

If you have questions about the event, please contact SourcingTrainer03 at or via e-mail at [eptraining@doa.nc.gov](mailto:eptraining@doa.nc.gov).

Thank you!

# NC eProcurement

## Responding to a Sourcing Event

- Sourcing Agents are advised to add an Addendum directly to Section 3. In most cases this should result in an Addendum being attached to subsection 3.3. Vendors should locate the Addendum, download and read the attachment by clicking on the blue text, and respond accordingly.

1. Review Event Details

2. Review and Accept Prerequisites

3. Submit Response

Event Contents

All Content

1 Welcome to the State...

All Content

3 Solicitation Document and Details

3.1 This document includes details on the intent, use, duration, and scope of the goods and / or services being requested, information on the solicitation process and instructions on how to respond, the State's terms and conditions. [RFP\\_Healthcare Services.docx](#)

3.2 Vendor Question Template - Vendor shall submit any questions it may have regarding this Solicitation or the Solicitation process via the Sourcing Tool's Message Board using the provided Vendor Question Template. Written questions concerning this Solicitation will be received until the date and time listed in the Schedule Section of this Solicitation. [Vendor Question Submission Template.xlsx](#)

3.3 Please see the Attached Addendum document [Sourcing Event Addendum.doc](#)

4 Vendor Identification

4.1 North Carolina Customer Number - For internal State agency processing, please provide your company's North Carolina eProcurement System Customer Number, which can be found on the North

## VIII. Revising a Submitted Bid Response

Vendors can revise their submitted bid response as many times as necessary until the Event's deadline for accepting responses as indicated by the countdown clock in the top right of the screen.

- As long as the Sourcing Agent is still accepting responses to their Solicitation in the Sourcing Event, vendors can unlock a previously submitted bid response for revision by clicking the **'Revise/Alternative Response'** button at the top of the screen.

Console

Doc114057374 - Example Sourcing Event

Time remaining 13 days 17:55:22

You have submitted a response for this event. Thank you for participating.

Revise/Alternative Response

All Content

1 Welcome to the State of North Carolina's Sourcing Tool

2 Instructions on How to Use the Sourcing Tool

3 Solicitation Document and Details

3.1 This document includes details on the intent, use, duration, and scope of the goods and / or services being requested, information on the solicitation process and instructions on how to respond, the State's terms and conditions. [RFP\\_Healthcare Services.docx](#)

3.2 Vendor Question Template - Vendor shall submit any questions it may have regarding this Solicitation or the Solicitation process via the Sourcing Tool's Message Board using the provided Vendor Question Template. Written questions concerning this Solicitation will be received until the date and time listed in the Schedule Section of this Solicitation. [Vendor Question Submission Template.xlsx](#)

3.3 Please see the Attached Addendum document [Sourcing Event Addendum.doc](#)

- Answer fields will be open for overwriting, and new attachments can be added.

Response History

Response Team

Checklist

1. Review Event Details

2. Review and Accept Prerequisites

3. Submit Response

Event Contents

All Content

1 Welcome to the State...

All Content

12345

Pricing Submittal Workbook - COMPLETED.xlsx Update file Delete file

Submit Entire Response

Reload Last Bid

Save draft

Compose Message

Excel Import



# NC eProcurement

## Responding to a Sourcing Event

- When all necessary changes have been made, click **'Submit Entire Response'** to finalize and send the updated bid response to the Sourcing Agent, or click **'Reload Last Bid'** to erase any changes and revert to the version on file before the edits were initiated.

### Notes:

- If a revision is initiated but never resubmitted, or time expires before the vendor is able to resubmit, the last bid response on file will be the version evaluated by the Sourcing Agent.
- The revised submittal will be recorded on the **'Event Messages'** and **'Response History'** pages, and the **'Revise/Alternative Response'** button will once again be visible.

The screenshot shows the 'All Content' page in the NC eProcurement system. On the left is a sidebar with a 'Checklist' containing three items: '1. Review Event Details', '2. Review and Accept Prerequisites', and '3. Submit Response'. Below the checklist is an 'Event Contents' section with a link to 'All Content'. The main content area displays a list of items, including a 'Pricing Submittal' (item 5.1) which is highlighted. A yellow callout box with an arrow points to the 'Submit Entire Response' button at the bottom of the page, with the text: 'Click \'Submit Entire Response\' to resubmit an updated bid response.' The button is highlighted with a red box. Other buttons visible include 'Reload Last Bid', 'Save draft', 'Compose Message', and 'Excel Import'.

## IX. Handling Confidential Information

Vendors can submit a version of their response that protects potential Confidential Information from public distribution by submitting an additional version where that Confidential Information has been redacted. Keep in mind that the vendor's primary response to be considered by the Sourcing Agent shall be complete, the redacted version would only be used if the Sourcing Agent is asked to share response information with outside entities.

- Vendors will find the Confidential Information subsection towards the end of Section 6 (the exact subsection differs based on the type of Solicitation to which they are responding). If the vendor answers **'Yes'** to the first question regarding Confidential Information, they shall proceed to the next subsection that includes further information about the process of including a redacted response. It is important the vendor read and understand that section and that all portions of their primary response have been entered into the tool before proceeding (there may be subsections below this that need to be completed).

The screenshot shows the 'All Content' page in the NC eProcurement system, specifically the 'CONFIDENTIAL INFORMATION' subsection (6.24). The sidebar on the left is the same as in the previous screenshot. The main content area displays the 'CONFIDENTIAL INFORMATION' subsection, which includes a question about whether the response contains Confidential Information. A yellow callout box with an arrow points to the dropdown menu, with the text: 'If there is any Confidential Information included in the response, select \'Yes\' from the dropdown.' The dropdown menu is open, showing options: 'Unspecified', 'Yes', 'No', and 'Unspecified'. The 'Yes' option is selected. The 'Submit Response' button in the sidebar is highlighted with a red box.

## NC eProcurement

### Responding to a Sourcing Event

- Once all portions of the primary response have been completed, the vendor should click the **'Excel Import'** button at the bottom of the page.

5 Pricing Submittal

6 Vendor Response

7 Additional Questions...

7.4 Customer Reference #3 - Vendor shall select References to download the Customer Reference Template, complete the template, and upload the References

7.5 Vendor shall download questions related to the S (download the file), provide document, and upload the Attach a file.

(\*) indicates a required field

Submit Entire Response | Save draft | Compose Message | **Excel Import**

Click 'Excel Import' to begin the process of including a redacted version of the response.

- On the **'Import Response from Excel'** page, click **'Download Content'** and open the Excel file.

Import Response from Excel

Done

Step 1. Click "Download Content" to download and review your event in an Excel Spreadsheet. Skip this step if you wish to import a previously downloaded file.

Download Content | Download Attachments

Step 2. Declare your intention to respond and enter your response in the Excel spreadsheet and save the file to your computer.

Click the 'Download Content' button and open the resulting Excel file.

- The file will have several tabs. The first tab will be the **'Submit Response Instructions'** tab and is for informational purposes. The subsequent tabs will be numbered and correspond to the content sections in the of the Sourcing Event. For example, the first tab visible after the instructions tab is titled **'3 Solicitation Document and ...'** which matches up to Section 3 in the Event where the vendor found the **'Solicitation Document,'** the **'Vendor Question Submission Template,'** and an **'Addendum'** if it was necessary. Those documents will not be found attached to this Excel file, but they will be listed here.
- Sections 4-7 are the sections into which the vendor responded with answers or attachments for their primary bid response in the Sourcing Event. These same tabs are the sections that may include Confidential Information. Review all information on these tabs and any information removed by the vendor shall be replaced with "Redacted." After any updates have been made, name the Excel file so that it indicates it represents a Confidential version of the response and save it to the desktop.
  - The value in the tab titled **'4 Vendor Identification'** should remain the same because the vendor is responding on behalf of the same account.
  - The value in the tab titled **'5 Pricing Submittal'** lists the name of the pricing document attached in the primary bid response. This value cannot be overwritten.
  - There are several answer fields in the tab titled **'6 Vendor Response'** that could possibly contain Confidential Information.
  - If there's a tab titled **'7 Additional Questions to Ve...'**, click on that tab and make any redactions necessary.

# NC eProcurement

## Responding to a Sourcing Event

Question ID	Question	Answer
6.3	If Vendor answered No to previous question, Vendor shall indicate the number of calendar days after proposal opening that its proposal will remain valid.	90
6.4	Enter Offeror's Company Name:	Example Company A
6.5	Enter Offeror's Full Address:	123 Main Street
6.6	Enter full name, title, email address, and phone number of company official authorized to bind offeror.	REDACTED
6.7	LOCATION OF WORKERS UTILIZED BY VENDOR	No

Questions on the left and answers fields on the right on the '6 Vendor Response' tab.

- Return to the 'Import Response from Excel' page and click 'Download Attachments' if any of the documents uploaded to the Sourcing Event contain any Confidential Information that would need to be redacted.

**Import Response from Excel**

Step 1. Click "Download Content" to download and review your event in an Excel Spreadsheet. Skip this step if you wish to import a previously downloaded file. If you want to start

[Download Content](#) [Download Attachments](#)

Step 2. Declare your intention to respond and enter your response in the Excel spreadsheet and save the file to your computer.

Click the 'Download Attachments' button to access any attachments that may contain Confidential Information.

- On the subsequent page, vendors should check the boxes next to the sections or subsections from which they wish to download attachments. It is advised that they click the box next to 'Title' and download all attachments unless they are extremely familiar with the specific sections that have attachments. When all sections have been selected, click 'Download Attachments.'

**Selected Attachments Summary**

Total Size (MB): 0.83  
Max Size (MB): 0.48  
Total Number: 8  
Selected Items: 16

[Download Attachments](#)

**Selected Items**

Checkbox	Item
<input checked="" type="checkbox"/>	Title
<input checked="" type="checkbox"/>	Totals
<input checked="" type="checkbox"/>	1 Welcome to the State of North Carolina
<input checked="" type="checkbox"/>	2 Instructions on How to Use the Sourcing Tool
<input checked="" type="checkbox"/>	3 Solicitation Document and Details
<input checked="" type="checkbox"/>	3.1 This document includes details on the intent, use, duration, and scope of the goods and / or services being requested, information on the solicitation process and instructions on how to respond, and the State's terms and conditions.
<input checked="" type="checkbox"/>	3.2 Vendor Question Template - Vendor shall submit any questions it may have regarding this Solicitation or the Solicitation process via the Sourcing Tool's Message Board using the provided Vendor Question Template. Written questions concerning this Solicitation will be received until the date and time listed in the Schedule Section of this Solicitation.

Check the box next to 'Title' to select all sections so that all possible documents are downloaded, then click the 'Download Attachments' button.

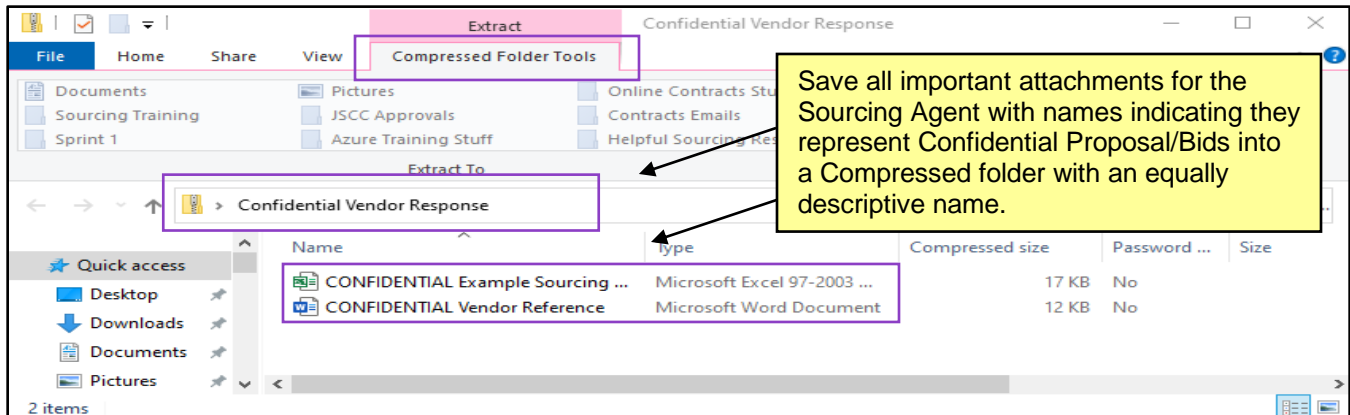
- Open the compressed file containing all documents requested and make any redactions necessary. After any updates have been made, name the files in a way indicating they represent a Confidential version of the original files and save them to the desktop.

# NC eProcurement

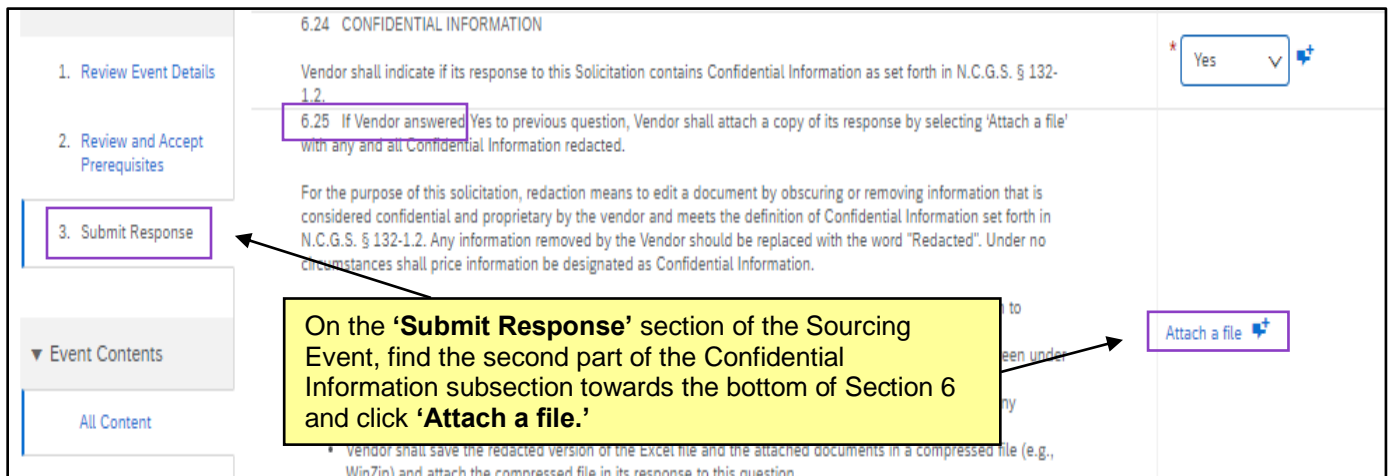
## Responding to a Sourcing Event

9. Save the redacted Proposal/Bid Excel file from Step 5 and any redacted attachments from Step 8 in a Compressed Folder. Be sure to name each file in the folder so it can be clearly identified by the Sourcing Agent as a Confidential Proposal/Bid document. As well, give the overall Compressed Folder a name that indicates it contains documents pertaining to a Confidential Proposal/Bid.

**Note:** For most MS Windows users, a quick way to save a document into a Compressed Folder is to right-click on the document(s) needing to go into the folder, move the cursor down to **'Send to,'** and select the option for **'Compressed (zipped) folder,'** at which point other documents can be added, and the folder can be renamed.



10. Navigate back to the second Confidential Information subsection in Section 6 (in the screenshot below, it's subsection 6.25, but this may differ based on the type of Solicitation to which the vendor is responding) and click the **'Attach a file'** link. Select the Compressed Folder with the redacted Proposal/Bid attachments from the desktop and click **'OK.'**



# NC eProcurement

## Responding to a Sourcing Event

- The Compressed Folder will now show as attached. If no other changes are necessary and all content has been reviewed for accuracy, click the **'Submit Entire Response'** button. Once the bidding **'Due Date'** arrives, the Sourcing Agent will be able to view the primary bid response in the tool's intended answer fields, as well as download all redacted attachments if there's a need to distribute a Confidential version of the Proposal/Bid.

## X. Submitting Alternate Proposals/Bids

Vendors can submit as many Alternate Proposals as necessary. For example, maybe the pricing for a set of items in one color is different than the pricing for those same items in another color, and they want the Sourcing Agent to consider both bid responses. The vendor will submit a bid response for the first set of items in the normal fashion, and then they will attach all bid response information for the second set of items (as well as a duplicate version of the primary bid) in a compressed file to the bottom of the same Sourcing Event. If a vendor needs to submit multiple Alternate Proposals for the same Sourcing Event (i.e., a minimum of three total responses), they will create subfolders for each Alternate Proposal in one compressed file and submit them all together.

- Vendors will find the Alternate Proposal/Bid subsection towards the end of Section 6 (the exact subsection differs based on the type of Solicitation to which they are responding). It is important the vendor read and understand that section and that all portions of their primary response have been entered into the tool before proceeding (there may be subsections below this that need to be completed).
- Once all portions of the primary response have been completed, the vendor should click the **'Excel Import'** button at the bottom of the page.





# NC eProcurement

## Responding to a Sourcing Event

- Return to the **'Export Content to Excel'** page and click **'Download Attachments'** if any of the documents uploaded to the Sourcing Event by the Sourcing Agent are needed to help the vendor compile their Alternate Proposal/Bid.

### Export Content to Excel

Done

**Step 1.** Click "Download Content" to download and review your event in an Excel Spreadsheet. Skip this step if you wish to import a previously downloaded file. If you want to start over, click

Download Content

Download Attachments

**Step 2.** Declare your intention to respond and enter your response in the Excel spreadsheet and save

Click the **'Download Attachments'** button to download any or all documents included for the vendor's reference on the Sourcing Event.

- On the subsequent page, vendors should check the boxes next to the sections or subsections from which they wish to download attachments. It is advised that they click the box next to **'Title'** and download all attachments unless they are extremely familiar with the specific sections that have attachments. When all sections have been selected, click **'Download Attachments.'**

### Selected Attachments Summary

Download Attachments

Total Size (MB): 0.83  
Max Size (MB): 0.48  
Total Number: 8  
Selected Items: 16

**Selected Items**

<input checked="" type="checkbox"/>	Title
<input checked="" type="checkbox"/>	Totals
<input checked="" type="checkbox"/>	1 Welcome to the State of North Carolina's Sourcing Tool
<input checked="" type="checkbox"/>	2 Instructions on How to Use the Sourcing Tool
<input checked="" type="checkbox"/>	3 Solicitation Document and Details
<input checked="" type="checkbox"/>	3.1 This document includes details on the intent, use, duration, and scope of the goods and / or services being requested, information on the solicitation process and instructions on how to respond, and the State's terms and conditions.
<input checked="" type="checkbox"/>	3.2 Vendor Question Template - Vendor shall submit any questions it may have regarding this Solicitation or the Solicitation process via the Sourcing Tool's Message Board using the provided Vendor Question Template. Written questions concerning this Solicitation will be received until the date and time listed in the Schedule Section of this Solicitation.

Check the box next to **'Title'** to select all sections so that all possible documents are downloaded, then click the **'Download Attachments'** button.

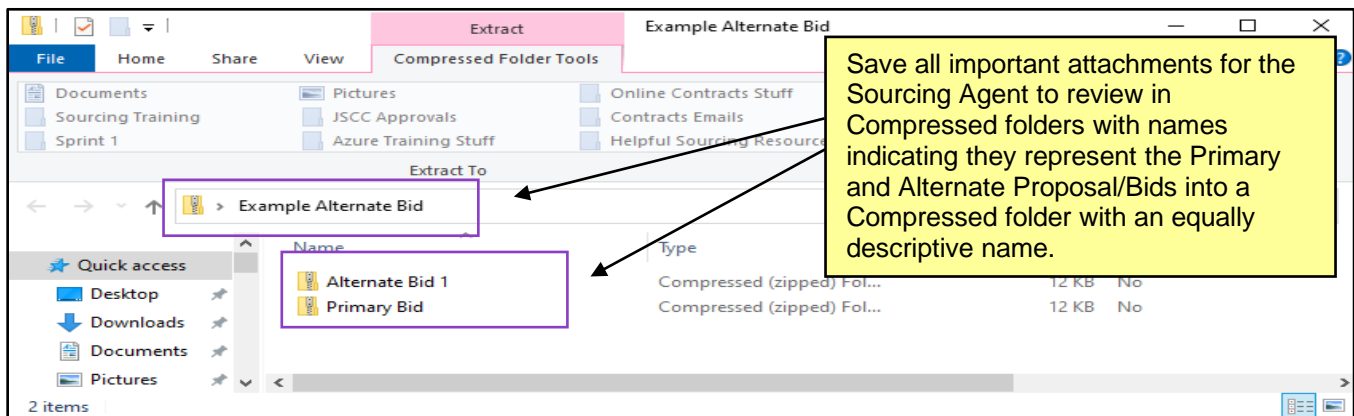
- Open the compressed file containing all documents requested and make any edits necessary to reflect the changes in the alternate proposal/bid. Make sure to keep the original versions of these documents and gives them names indicating they're the primary versions of the proposal/bid attachments. After any updates have been made to the new versions, name the files in a way indicating they represent an alternate version of the original files and save them to the desktop.

# NC eProcurement

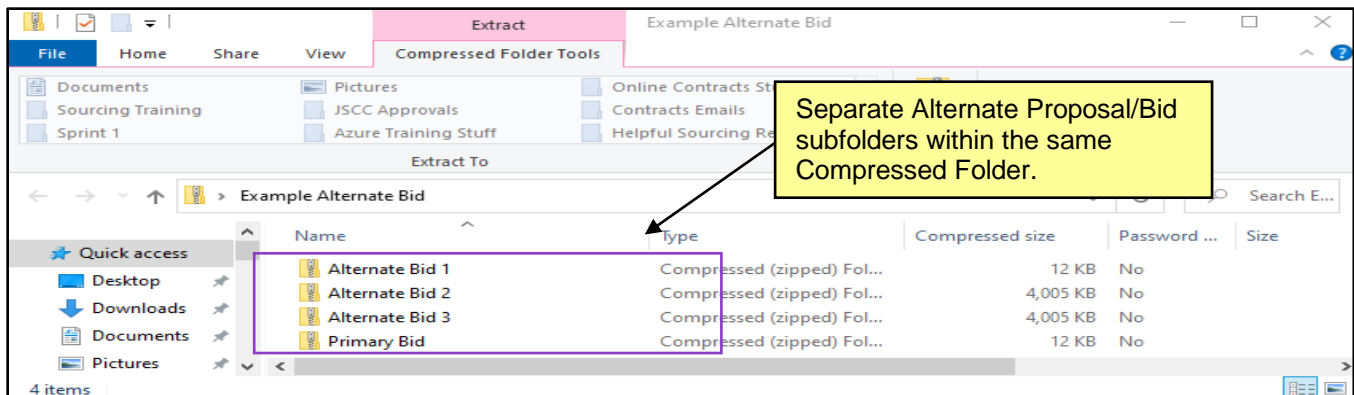
## Responding to a Sourcing Event

9. Save the Primary and Alternate Proposal/Bid Excel files from Step 5 and all attachments from Step 8, including the primary and updated **'Pricing Submittal Workbook,'** in a Compressed Folder. Be sure to name each file in the folder so it can be clearly identified by the Sourcing Agent as the Primary or Alternate Proposal/Bid document. As well, give the overall Compressed Folder a name that indicates it contains documents pertaining to an Alternate Proposal/Bid.

**Note:** For most MS Windows users, a quick way to save a document into a Compressed Folder is to right-click on the document(s) needing to go into the folder, move the cursor down to **'Send to,'** and select the option for **'Compressed (zipped) folder,'** at which point other documents can be added, and the folder can be renamed.



10. If a vendor is submitting multiple Alternate Proposal/Bids, the documents respective to each Alternate Proposal/Bid should be saved in separate, clearly-named subfolders within the same Compressed folder, along with the Primary Proposal/Bid.



# NC eProcurement

## Responding to a Sourcing Event

11. Navigate back to the Alternate Proposal/Bid subsection in Section 6 (in the screenshot below, it's subsection 6.26, but this may differ based on the type of Solicitation to which the vendor is responding) and click the **'Attach a file'** link. Select the Compressed Folder with the Alternate Proposal/Bid attachments from the desktop and click **'OK.'**

**On the 'Submit Response' section of the Sourcing Event, find the 'Alternate Proposals/Bids' subsection towards the bottom of Section 6 and click 'Attach a file.'**

12. The Compressed Folder will now show as attached. If no other changes are necessary and all content has been reviewed for accuracy, click the **'Submit Entire Response'** button. Once the bidding **'Due Date'** arrives, the Sourcing Agent will be able to view the primary bid response in the same format as the attachments for any Alternate Proposal/Bid responses.

**When the Compressed File is attached, click the 'Submit Entire Response' button to add the Alternate Proposal/Bids to the primary bid.**

13. If there is a need for a vendor to provide redacted versions of any part of their Alternate Proposal/Bids, the second Alternate Response subsection provides them with that opportunity. Create a copy of the Compressed Folder containing all Alternate Proposals/Bids, replace any Confidential Information with "Redacted," and name all files and folders in a way that indicates the information contained within is the Confidential version of the Alternate Proposal/Bids. Finally, attach that Compressed Folder in the **'Attach a file'** link next to the second Alternate Proposal/Bid subsection. For more information on Confidential Information, please refer to the steps outlined in the above **'Handling Confidential Information'** section.