

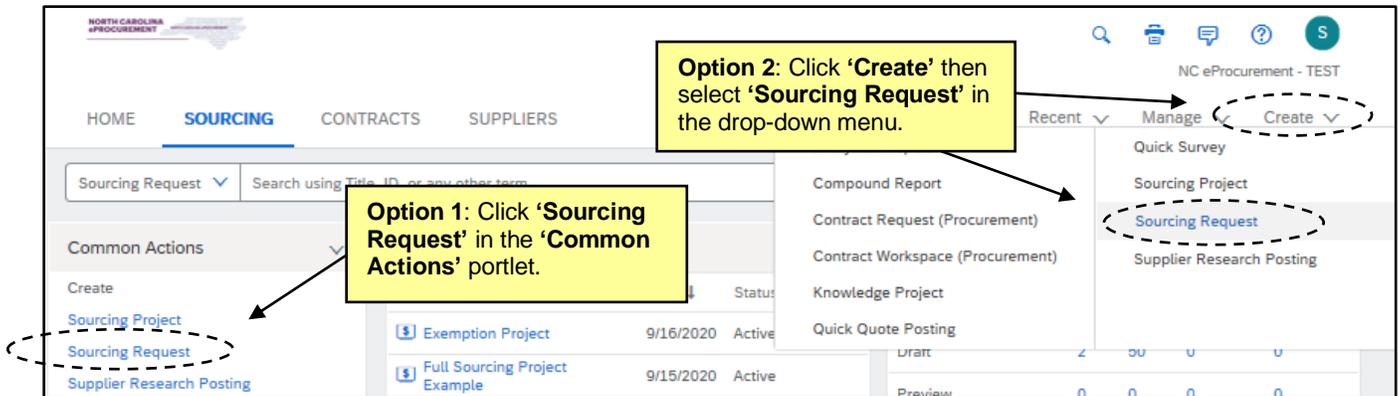
# NC eProcurement

## Sourcing Requests and Procurement Exceptions

A Sourcing Request (SR) is used to request the creation of a Sourcing Project and Event to conduct a solicitation when the initiating user is not able to create or complete a Sourcing Project on their own. The requesting user will fill out the **'Sourcing Request Attributes'** section, select the template, and create the Sourcing Request. They will then add the **'Solicitation Document'** to the Request before submitting it to another user via an **'Approval Task.'** The approving user will then turn the Request into a Sourcing Project on behalf of the initiating user. This can be done between users within an agency, or an agency user can submit a Sourcing Request to P&C if they are attempting to solicit Non-IT Goods over their agency's delegation.

### I. Creating a Sourcing Request for Non-IT Goods Over Agency Delegation

1. There are two options for initiating a Sourcing Request:
  - a. In the **'Common Actions'** portlet on the left side of the screen, click the **'Sourcing Request'** link.
  - b. In the upper right corner of the screen, click **'Create'** and select **'Sourcing Request'** in the subsequent drop-down menu.



2. The **'Sourcing Request Attributes'** page will display. Populate all relevant fields including the six required fields, as noted by an asterisk (\*). Some fields are conditional, meaning that the information entered in these portions of the SR determine options later in the process, including the selection of the **'Solicitation Document.'**

**Notes:**

- In the **'Entity'** field, select the entity of the requesting user, not P&C, even if it is being routed there to be turned into a Sourcing Project.
- Select **'Non-IT: IFB Agency Goods'** in the **'Solicitation Vehicle'** field.
- For more detailed guidance on filling out these fields, please see the ['Creating a Sourcing Project'](#) job aid.

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 BIDDING  
 BUY

### Create Sourcing Request

Create
Cancel

To create a Sourcing Request, specify the fields below. Templates used for constructing your Sourcing Request appear in the section at the bottom of the page, and available [More](#)

Name: *	<input type="text" value="Untitled Sourcing Request"/>	(i)
Description:	<input style="height: 30px;" type="text"/>	(i)
Copy from Project:	<input type="text" value="(no value)"/>	
Project State:	<input type="text" value="Active"/>	(i)
Test Project: *	<input type="radio"/> Yes <input type="radio"/> No	(i)
Entity: *	<input type="text" value="(no value)"/>	
Estimated Total Contract Value:	<input type="text"/> USD	(i)
Estimated Annual Contract Value: *	<input type="text"/> USD	(i)
Solicitation Vehicle: *	<input type="text" value="Non-IT: IFB Agency Goods"/>	
Approval Scenario: *	<input type="text" value="No Choice"/>	(i)
Special Circumstances:	<input type="text" value="(no value)"/>	(i)
Predecessor Project:	<input type="text" value="(no value)"/>	(i)
Owner:	<input type="text" value="SourcingUser01"/>	(i)
Currency:	<input type="text" value="US Dollar"/>	
Commodity:	<input type="text" value="(no value)"/>	

- In the 'Select a template' section of the Sourcing Request Attributes page, note that the radio button next to the 'Agency Sourcing Request' template is automatically selected.

#### Select a template

Select the template you want to use, and answer any questions related to it to create your Sourcing Request. The selected template will affect which templates are available.

**When the 'Agency Sourcing Request' template is selected, there are no template questions. This template will be used for all Sourcing Requests.**

[Agency Sourcing Request](#)

*Use this Process Template for Agency Solicitations for Non-IT Goods over the Entity's Delegation.*

- When all fields have been completed and it is confirmed that the template has been selected, click the 'Create' button in the top or bottom right of the screen. If any required fields are missing, or there are any other issues, the system will alert the user to the missing or incorrect information by highlighting those fields in a red border accompanied by an informative error message.

**Note:** Users cannot save a Sourcing Request before clicking 'Create.' If it is not completed in one session, it will have to be re-entered from the beginning. Once the user clicks 'Create,' the SR will be saved in the system and assigned a system-generated ID # beginning with 'SR.'

- After clicking 'Create' on the Sourcing Attributes page, the Sourcing Request (SR) is saved, and the Overview Tab is displayed. This screen contains information about the Sourcing Request captured on the previous Sourcing Attributes page. From this screen, users can access six other tabs for the management of the SR: 'Documents,' 'Tasks,' 'Team,' 'Message Board,' 'Event Messages,' and 'History.' At this point, the 'Project State' is 'Active.'

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- On the **'Overview'** tab, scroll down the screen to verify the accuracy of the information populated in the previous **'Sourcing Attributes'** section. To edit any of this information, click on **'Actions'** at the top of the page and select **'Edit Overview'** from the drop-down.

The screenshot shows the 'Example Non-IT Goods Request' interface. At the top right, it displays 'ID: SR85277677', 'Tasks: Incomplete Tasks: 0', and 'Current Phase: 01 - LAUNCH PROJECT'. Below this is a navigation bar with tabs: Overview, Documents, Tasks, Team, Message Board, Event Messages, and History. The 'Overview' tab is selected and highlighted with a dashed oval. Below the navigation bar, there is a section for 'Sourcing Attributes' with fields for ID, Project State (Active), Version (Original), Project Status (Gray), Start Date (09/16/2020), Due Date, and Owner (SourcingUser01). To the right of this section is an 'Actions' menu with options: View Details, Move, Create, Copy Project, and Follow-on Project. A yellow callout box points to the 'Actions' menu with the text: 'To edit section information, click on 'Actions' and select 'Edit Overview.''. Another yellow callout box points to the 'Overview' tab with the text: 'The 'Overview' tab is displayed once the SR is created. It is populated with information entered in the previous 'Sourcing Attributes' section.' A third yellow callout box points to the 'Overview' tab with the text: 'Access to additional tabs'.

- Navigate to the **'Tasks'** tab and note the four Phases consisting of fifteen Tasks. These Tasks are a best practice roadmap to submitting the Sourcing Request per the guidance of P&C. In order for the Sourcing Request to be accepted by P&C, the last two Tasks on this tab must be completed: **'Populate Solicitation Document Template'** and **'Gain Approval of Sourcing Request.'**

The screenshot shows the 'Tasks' tab for '04 - DEVELOP SOURCING EVENT'. The tasks are listed in a table with columns for task name, status, and owner. The last two tasks are circled in red: 'Populate Solicitation Document Template' and 'Gain Approval of Sourcing Request'. A yellow callout box points to these two tasks with the text: 'Focus on the last two Tasks on the 'Tasks' tab.' The table data is as follows:

Task Name	Status	Owner
Identify Minimum Qualifications	Not Started	Project Owner
Identify Evaluation Approach	Not Started	Project Owner
Identify Evaluation Criteria and Questions	Not Started	Project Owner
Develop Evaluation Guide / Scoring Matrix	Not Started	Project Owner
Develop Cost Proposal Template	Not Started	Project Owner
Populate Solicitation Document Template	Not Started	Project Owner
Gain Approval of Sourcing Request	Not Started	Project Owner

- To complete the **'Populate Solicitation Document Template'** task, navigate to the **'Documents'** tab and click the blue triangle to the left of the **'Solicitation Document'** folder. Next, click the arrow to the right of the **'IFB\_Agency\_Goods'** document and select **'Download'** from the dropdown menu. Fill out the template with the requisite information so that P&C can complete the solicitation on the user's behalf. Then click back onto the arrow to the right of the **'IFB\_Agency\_Goods'** document, but this time select **'Replace Document'** and attach it back in its completed form.

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- Return to the 'Tasks' tab, expand **Phase 4**, and click on the last task, '**Gain Approval of Sourcing Request.**' From the dropdown menu, select '**View Task Details.**'

- On the subsequent '**Approval Task**' page, click the dropdown in the '**Select Approvers**' section and choose the appropriate group or individual at P&C to which this request should be directed.
- The default '**Approval Rule Flow Type**' is '**Parallel,**' but that can be changed if either '**Serial**' or '**Custom**' is preferred. If there is only one approver being added, this selection does not matter.
- It is not required to specify a due date, but by doing so, a notification to complete this '**Approval Task**' will display in the approver's '**To Do**' portlet in addition to the email notification they will receive.
- Include an informative message further explaining the Request and include any additional attachments if necessary (there is no need to attach the Solicitation Document here as it is attached to the overall SR) and click '**Submit.**'

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**Approval Task** Cancel

This task requires approval on one or more documents. Prior to submitting this task, documents must be ready for approval. You can enter any necessary task messages and add [More](#)

Example Non-IT Goods Request / [Gain Approval of Sourcing Request](#)

**TSK85277695 Gain Approval of Sourcing Request** Round 1: Not Started ⓘ

- ▶ [Example Non-IT Goods Request](#) ▼
- Select Approvers
  - Add more
  - Approval Rule Flow Type:
    - Parallel
    - Serial
    - Custom
- Specify Due Date
  - Days after event starts: None ⓘ
  - Fixed Date:  ⓘ
- Provide an initial message and click Submit or Mark Cancelled
 

Additional Attachments

Select a specific P&C approver or group, specify a due date, describe the Request in the message box, and click 'Submit.'

14. The Sourcing Request will display in the user's **'My Documents'** portlet, and the **'Approval Task'** will show up in their **'To Do'** queue with a status of **'In Approval.'** If the requester needs to follow its progress or make any changes, they can click on the task **'Title'** and look at the **'Approval Flow'** tab or click **'Withdraw'** on the subsequent page if they need to pull it back.

HOME **SOURCING** CONTRACTS SUPPLIERS Recent Manage Create

Sourcing Request Search using Title, ID, or any other term

**Common Actions**

- Create
- Sourcing Project
- Sourcing Request
- Supplier Research Posting
- Knowledge Project
- More

**Recently Viewed**

- Example Non-IT Goods Request
- Exemption Project
- Full Sourcing Project Example
- Request Test...f Competition
- Example Sour...vices Project

**My Documents**

Title	Date	Status
<a href="#">Example Non-IT Goods Request</a>	9/17/2020	Active
<a href="#">Exemption Project</a>	9/16/2020	Active
<a href="#">Full Sourcing Project Example</a>	9/15/2020	Active
<a href="#">Request Test - Waiver of Competition</a>	9/15/2020	Active
<a href="#">Sourcing Test</a>	9/4/2020	Active
<a href="#">Personal Workspace</a>	9/4/2020	Draft

**Notifications**

From	Subject	Received
SourcingUser01	Event Example Sourcing Event - Envelope 2 can now ...	9/11/2020 8:02 AM
SourcingUser01	Event Example Sourcing Event -	9/11/2020

**Event Status (Last 12 months)**

	RFI	RFP	Auction	Forward Auction
Draft	2	50	0	0
Preview	0	0	0	0
Open	0	4	0	0
Pending Selection	0	63	0	0
Completed	0	11	0	0

**To Do**

Date	Status	Title
9/23/2020	In Approval	Gain Approval of Sourcing Request (Example Non-IT Goods Request)
9/18/2020	In Approval	Gain Approval of Award
9/16/2020	Complete	Request Test (Full Sourcing Project Example)
9/16/2020	Approved	Develop Addendum after Question Submission Deadline (Full Sourcing Project Example)
9/16/2020	Approved	Gain Approval of Addendum (Full Sourcing Project Example)

Access the Sourcing Request from the **'My Documents'** portlet or monitor the status of P&C's approval from the **'To Do'** queue.

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15. When P&C approves the Sourcing Request, the **'Approval Task'** will transition to **'Approved'** status and the P&C approver will be prompted to turn the Request into a Sourcing Project so they can manage the solicitation on behalf of the requester.

The 'Approval Task' is now in 'Approved' status, and the requester must wait until P&C creates a Sourcing Project from this Request and manages the solicitation on their behalf.

Date	Status	Title
9/18/2020	In Approval	Gain Approval of Award Recommendation (Full Sourcing Project Example)
9/17/2020	Approved	Gain Approval of Sourcing Request (Example Non-IT Goods Request)
9/16/2020	Complete	Develop Addendum after Question Submission Deadline (Full Sourcing Project Example)
9/16/2020	Approved	Gain Approval of Addendum (Full Sourcing Project Example)

16. The requester will also receive an email letting them know that P&C has approved the Sourcing Request.

SR85453264 - Sourcing Request Test: Gain Approval of Sourcing Request was approved by SourcingSupervisor1.

AA Ariba Administrator <no-reply@ansmp.ariba.com>  
 To: Expires 10/17/2020  
 Retention Policy 1 Month Delete (30 days)  
 This item will expire in 30 days. To keep this item longer apply a different Retention Policy.

SR85453264 - Sourcing Request Test: Gain Approval of Sourcing Request was approved by SourcingSupervisor1.

**The following task can be started:** Gain Approval of Sourcing Request

**Task description:**

**The following notes might also be helpful to you:** Approved

You are being sent this email because someone in the approval flow of the task has approved the document.

This email originated from the Ariba system used by NC eProcurement - TEST and was originally sent to: [REDACTED]

System Reference: [Click Here](#) to access the system.

17. When the Sourcing Request has been turned into a Sourcing Project by P&C, the original requester will note that there is a link to the resulting Sourcing Project beneath **'Follow-on Projects'** on the right side of the **'Overview'** tab of their original Request. From this link they can monitor the progress of the solicitation being handled on their behalf by P&C.

Once the Sourcing Project has been created by P&C, the requester can monitor it by clicking on the link to that **'Follow-on Project.'**

Example Non-IT Goods Request  
 Sourcing Request  
 ID SR85277677  
 Tasks: Incomplete Tasks: 0  
 Current Phase: 01 - LAUNCH PROJECT

Overview Documents Tasks Team Message Board Event Messages History

Overview

Project Status: Gray  
 Start Date: 09/16/2020  
 Due Date: 09/23/2020  
 End Date: 09/16/2020

Process  
 01 - LAUNCH PROJECT  
 02 - DEVELOP CATEGORY PROFILE  
 03 - DEVELOP SOURCING STRATEGY  
 04 - DEVELOP SOURCING EVENT

Follow-on Projects  
 Sourcing Project for DPS

## II. Creating a Sourcing Project from a Sourcing Request

When a user receives notification they have been asked to execute an **'Approval Task'** for a Sourcing Request, the user is expected to approve that task (assuming the requester submitted a complete and appropriate Sourcing Request) and turn the Request into a Sourcing Project on behalf of the requester. Often, these steps will be taken by P&C when they are asked to conduct a solicitation for Non-IT Goods above an agency's delegation.

1. The Sourcing Request recipient will receive an email requesting their approval. They can click the link to go directly to the Sourcing Request or take note of the SR# and search for that from their dashboard.

SR85277677 - Example Non-IT Goods Request: Gain Approval of Sourcing Request requires your approval...

Ariba Administrator <no-reply@ansmtp.ariba.com>  
To

Thu 9/17/2020

SR85277677 - Example Non-IT Goods Request: Gain Approval of Sourcing Request requires your approval because ""

**The following task can be started:** Gain Approval of Sourcing Request

**Task description:**  
The following notes might also be helpful to you:  
Please approve the Sourcing Request and convert it to a Sourcing Project on our behalf. Thanks!

This notification is being sent to any users added as an approver or reviewer on a task.

This email originated from the Ariba system used by NC eProcurement - TEST and was originally sent to: [REDACTED]

System Reference: [Click Here](#) to access the system.

The email notification requesting approval of a Sourcing Request included the SR# in the top left and a link to view that Sourcing Request in the bottom left.

2. If the Requester included a **'Due Date'** on the **'Approval Task,'** a notification will display in the **'To Do'** queue, and the task can be accessed from there.

**Note:** To see **'Task'** notifications for Sourcing Requests on the dashboard, click the wrench icon in the top right of the **'Sourcing'** tab, select **'Edit Properties,'** and check the boxes in the **'Sourcing Request'** row. That is not a default setting.

HOME SOURCING CONTRACTS SUPPLIERS

Recent Manage Create

Sourcing Project Search using Title, ID, or any other term

Common Actions

- Create Sourcing Project
- Sourcing Request
- Supplier Research Posting
- Knowledge Project
- More
- Manage Public Reports
- My Tasks
- Administration
- More

My Documents

Title	Date ↓	Status
Personal Workspace	9/14/2020	Draft
View All		

Received

Event Status (Last 12 months)

	RFI	RFP	Auction	Forward Auction
Draft	2	53	0	0
Preview	0	0	0	0
Open	0	4	0	0
Pending Selection	0	63	0	0
Completed	0	12	0	0

To Do

Date ↓	Status	Title
9/23/2020	In Approval	Gain Approval of Sourcing Request (Example Non-IT Goods Request)
9/18/2020	In Approval	Gain Approval of Award Recommendation (Full Sourcing Project Example)
View All		

'Approval Tasks' for Sourcing Requests will display in the 'To Do' queue if the requester included a 'Due Date' when assigning the task.

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- From the **'Approval Task'** page, the approver can view the Sourcing Request by clicking on the SR **'Name,'** or view any attached documents by clicking on whichever of them are of interest, particularly the **'IFB\_Agency\_Goods'** solicitation document. If everything looks good, click the **'Approve'** button. Add a message on the subsequent page if necessary and click **'OK.'**

**Approval Task** Exit

This task has been submitted for document approval. If you are the task approver, you may either Approve or Deny this task. Clicking Approve accepts one or more documents without [More](#)

Example Non-IT Goods Request / [Gain Approval of Sourcing Request](#)

TSK85277695 Gain Approval of Sourcing Request Round 1: Awaiting Response(s) ⓘ

SourcingUser01  
Please approve the Sourcing Request and convert it to a Sourcing Project on our behalf. Thanks!

Example Non-IT Goods Request

Sourcing Request Documents

Category Sourcing Strategy Template

Solicitation Document

IFB\_Agency\_Goods

Document Templates

Deny

Approve

Properties Task History Approval Flow

Owner: SourcingUser01 Date: 09/17/2020 01:49 AM

Please approve the Sourcing Request and convert it to a Sourcing Project on our behalf. Thanks!

- The Sourcing Request is now approved as noted by the checkmark next to that task. Below that task, a new task displays to prompt the P&C approver to **'Create Sourcing Project as Follow-on Project.'**

04 - DEVELOP SOURCING EVENT

Gain Approval of Sourcing Request	SourcingUser01	Approved	09/23/2020
Create Sourcing Project as Follow-on Project	P&C Approver	Not Started	

- Navigate to the **'Overview'** tab and click the **'Actions'** link. Select **'Follow-on Project'** from the dropdown menu.

**Example Non-IT Goods Request** ID SR85277677  
Tasks: Incomplete Tasks: 0  
Current Phase: 01 - LAUNCH PROJECT

Sourcing Request

Overview Documents Tasks Team Message Board Event Messages

Overview

ID: SR85277677 ⓘ

Project State: Active ⓘ

Version: v1

Project Status: Gray

Start Date: 09/16/2020 ⓘ

Due Date: 09/23/2020 ⓘ

End Date: 09/16/2020 ⓘ

Owner: SourcingUser01 ⓘ

Actions

- View Overview
- View Details
- Move
- Create
- Follow-on Project
- Delete
- Delete Project

Click 'Actions' and select 'Follow-on Project' from the dropdown.

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6. On the subsequent ‘Create Project’ page, click on ‘Sourcing Project.’



7. The ‘Create Sourcing Project’ page will display. Fill in the fields as necessary. Certain fields will have pre-populated based on the information entered in the Sourcing Request. When all fields are complete and the ‘State of North Carolina Sourcing Process’ template has been selected, click ‘Create.’

**Notes:**

- The ‘Predecessor Project’ field will auto populate with the name of the Sourcing Request that was just finalized.
- Leave the ‘Entity’ field populated with that of the requester.
- For the question at the bottom regarding copying documents from the parent project, it is advisable that the user leave this field as ‘No.’ It will be important to copy the Solicitation Document from the Sourcing Request to the Sourcing Project at some point, but there is no way to copy only certain documents, so many other documents would transfer over with it if the user answered ‘Yes,’ which would lead to duplicate folders and documents in the Sourcing Project.

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- On the **'Overview'** tab of the new Sourcing Project, note the link to the initial Sourcing Request underneath **'Predecessor Project.'** At this point, the user should manage the Sourcing Project and Event like any normal Sourcing Project.

**Sourcing Project for DPS**  
 ID: WS85470814  
 Tasks: Incomplete Tasks: 0  
 Current Phase: 01 - LAUNCH PROJECT

Overview | Documents | Tasks | Team | Message Board | Event Messages | History

Overview | Actions | Process | All Tasks

ID: WS85470814  
 Project State: Active  
 Version: Original  
 Project Status: Gray  
 Start Date: 09/17/2020  
 Due Date:  
 Owner: SourcingSupervisor1  
 Estimated Total Contract Value: \$500,000 USD  
 Estimated Annual Contract Value: \$500,000 USD

Process:  
 01 - LAUNCH PROJECT  
 02 - DEVELOP CATEGORY PRO  
 03 - DEVELOP SOURCING STRA  
 04 - DEVELOP SOURCING EVE  
 05 - CONDUCT SOURCING EVENT  
 06 - NEGOTIATE AND AWARD

Predecessor Project  
 Example Non-IT Goods Request

Link to original Sourcing Request.

### III. Requesting a Procurement Exception

If circumstances arise where a user needs to petition P&C for a Procurement Exception, that request and approval process is built into the Sourcing Project workflow. Users will indicate their intent to request an Exception in the **'Special Circumstances'** field on the **'Sourcing Project Attributes'** page, which triggers additional tasks and documents to be added to the Sourcing Project. The user will submit their specific Exception request to P&C for approval via the custom **'Exception Form'** before completing the Sourcing Project and initiating the Sourcing Event.

- While completing the **'Sourcing Project Attributes'** page after initiating a Sourcing Project, the user should click the dropdown arrow in the **'Special Circumstances'** field and select one of the two Exception types: **'Procurement Exception – Waiver of Competition,'** or **'Procurement Exception – Contract Duration Beyond 3 Years.'**

**Note:** **'Special Delegation'** is an additional circumstance that can be selected, but that does not require P&C approval. If no options display in the dropdown menu immediately, click **'Search more.'**

Solicitation Vehicle: \* Non-IT: RFP Agency for Services  
 Approval Scenario: \* Services  
 Special Circumstances: [Dropdown Arrow] (i)  
 Predecessor Project: Procurement Exception - Waiver of Competition  
 Special Delegation  
 Procurement Exception - Contract Duration Beyond 3 Years

Select a template  
 Search more

Select the template you want to use, and answer any questions related to it to create your project; how you set the fields in the section above might affect which templates are available.

Click the arrow next to the **'Special Circumstances'** field and select one of the two Exception types from the dropdown.

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- After clicking **'Create'** on the **'Sourcing Project Attributes'** page, navigate to the **'Tasks'** tab on the Sourcing Project and note the two Exception-related tasks in **Phase 3: 'Request Procurement Exceptions'** and **'Gain Approval of Procurement Exceptions.'**

Name	Document	Owner	Status	Due Date
01 - LAUNCH PROJECT				
02 - DEVELOP CATEGORY PROFILE				
03 - DEVELOP SOURCING STRATEGY				
Perform Budget Check	Project with a Procurement Exception Example	Project Owner	Not Started	
Request Procurement Exceptions	Exception Form	Project Owner	Not Started	
Gain Approval of Procurement Exceptions	Exception Form	Project Owner	Not Started	
04 - DEVELOP SOURCING EVENT		Project Owner	Not Started	
05 - CONDUCT SOURCING EVENT		Project Owner	Not Started	
06 - NEGOTIATE AND AWARD		Project Owner	Not Started	

- Click on the **'Request Procurement Exceptions'** task and select **'View Task Details'** in the dropdown.
- The **'Document Task'** page will display, and there will be a link to the **'Exception Form'** in the top left. Click the link and select **'Open For Reading'** from the dropdown. Alternately, the user will find a link to the **'Exception Form'** at the top of their **'Documents'** tab if they do not access it through the task.

Document Task

Make the necessary changes to this task, and click **OK** to save the changes. You can change the **Due Date**, change the chronological display order of this task in [More](#)

Project with a Procurement Exception Exa... / 03 - DEVELOP SOURCING STRATEGY / Request Procurement Exceptions

TSK85795769 Request Procurement Exceptions Not Started

Exception Form

Action

Open For Reading

View Details

Here you can do the following actions

- Follow the task instructions

Mark Cancelled Mark Complete

- The **'Exception Form'** page will display, and the user will have to specify the **'Exception Type'** and **'Enter brief description of items being requested.'** Depending on the specific **'Exception Type'** selected, additional questions and fields will appear. One additional required field will display if **'Contract Duration Beyond 3 Years'** is selected, while five additional fields will display for **'Waiver of Competition.'**

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 BUY

**Exception Form** [Save] [Cancel] [Revert] [Publish]

Edit form details below.

Save these changes as a new version?  Yes, save as v2  No, save and continue editing v1

Entity: ADMNP DOA Purchasing  
 Owner: SourcingUser01  
 Date: Wed, 16 Sep, 2020

Exception Type: \* [dropdown]

Enter brief description of items being requested: [text area]

Commodity: (no value)

Please enter any additional information you would like P&C to have. Add attachments to the approval: [rich text editor]

Task	Owner	Status	Completion	Version
Request Procurement Exceptions	Project Owner	Not Started		
Gain Approval of Procurement Exceptions	Project Owner	Not Started		

[Save] [Cancel] [Revert] [Publish]

6. When all fields have been populated on the 'Exception Form,' click 'Save.'

**Exception Form** [Save] [Cancel] [Revert] [Publish]

Edit form details below.

Save these changes as a new version?  Yes, save as v2  No, save and continue editing v1

Entity: ADMNP DOA Purchasing  
 Owner: SourcingUser01  
 Date: Thu, 17 Sep, 2020

Exception Type: \* Waiver of Competition [Add more]

Enter brief description of items being requested: \* Specialized Healthcare Services

Commodity: 851015 - Healthcare cente... View more

Estimated Annual Contract Value: \$500,000.00 USD

Select one or more of the following condition(s) that apply to this waiver of competition based on NCAC 05B .1401: \* Product or services available from only one [Add more]

Explain how the selected waiver condition applies to this particular product or service, and why this is the only product or service available from only one provider: \* No other providers

7. The user will be returned to the **'Documents'** tab. Navigate to the **'Tasks'** tab and click on the **'Gain Approval of Procurement Exceptions'** task and select **'View Task Details.'**
8. On the subsequent **'Approval Task'** page, click the dropdown in the **'Select Approvers'** section and choose the appropriate group or individual at P&C to which this request should be directed.
9. The default **'Approval Rule Flow Type'** is **'Parallel,'** but that can be changed if either **'Serial'** or **'Custom'** is preferred. If there is only one approver being added, this selection does not matter.
10. It is not required to specify a due date, but by doing so a notification to complete this **'Approval Task'** will display in the approver's **'To Do'** portlet in addition to the email notification they will receive.
11. Include an informative message further explaining the need for the Exception and include any additional attachments if necessary and click **'Submit.'**

12. When P&C approves the **'Exception Form,'** the user will be notified by email and the task in the **'To Do'** queue will change to **'Approved'** status. On the **'Tasks'** tab, the **'Gain Approval of Procurement Exceptions'** task will be marked **'Approved'** with a check mark to its left. At this point, the user may move on to **Phase 4** and continue with the Sourcing Project in a normal fashion.

Task Name	Status	Due Date
Perform Budget Check	Not Started	
Request Procurement Exceptions	Not Started	
<b>Gain Approval of Procurement Exceptions</b>	<b>Approved</b>	09/23/2020
04 - DEVELOP SOURCING EVENT	Not Started	
05 - CONDUCT SOURCING EVENT	Not Started	
06 - NEGOTIATE AND AWARD	Not Started	