NC electronic Vendor Portal

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STATE DEPARTMENT STATE BRANCE. LOCAL GOVERNMENT CITY COUNTY COMMUNITY COLLEGE PUBLIC SCHOOLS I J NORTH CAROLINA ePROCUREMENT PURCHAS ONLINE SHOPPING STATEWIDE TERM CONTRACT? LECTRONIC VENDOR PORTAL HUB CERTIFIED V' YUOTE PUNCHOUT CATALGG YUOTE PUNCHOUT CATALGG SOURCING BUY

DO YOU HAVE THE TIME?



INTRODUCTIONS

Tell us more about yourselves!

- What entity are you with?
- Do you use the eVP Agency App?
- Have you ever searched for a vendor in Public eVP?

Hello! We are the NC eProcurement Training Team.





Entity	electronic Vendor Portal (eVP)	NCEP Sourcing	NCEP Procurement eForms
State Agencies			
Community Colleges			
Universities			
K-12 Schools			
Local Governments			



WHAT IS eVP?

PUBLIC PORTAL

- Public Vendor Search
- Browse Solicitations
- View Contract Extensions
- Vendors can register, manage registration, initiate HUB and NCSBE certifications and respond to solicitations

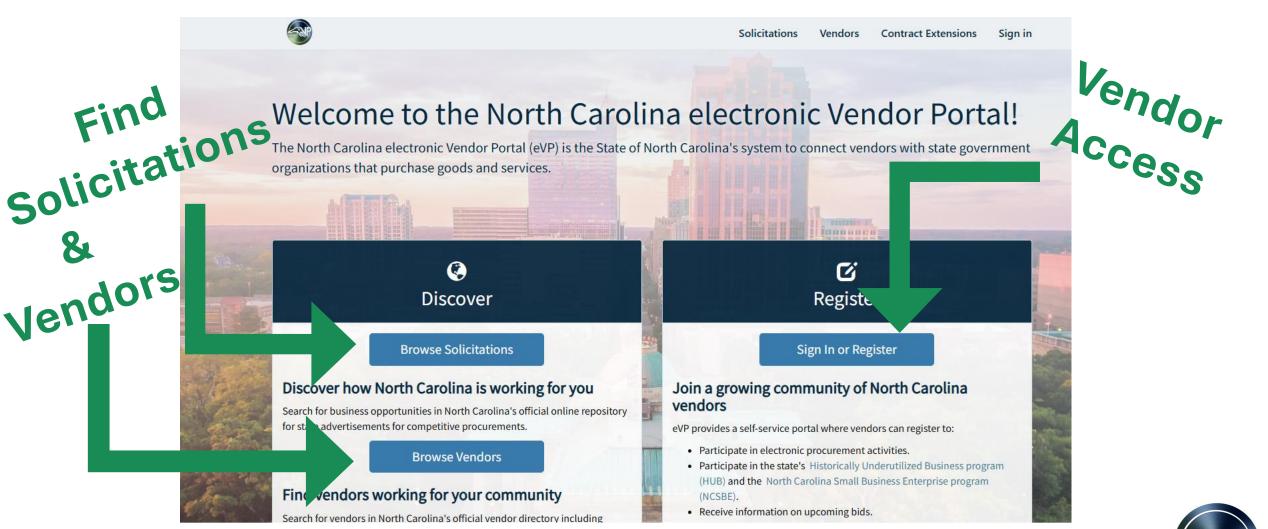
AGENCY APPLICATION

- Search Vendors
- Post and View
 Solicitations, enter Bid
 Tabulations and
 Awards
- Post and View Contract Extensions
- Enter HUB Statistics Reports

eVP connects vendors and state government purchasers!

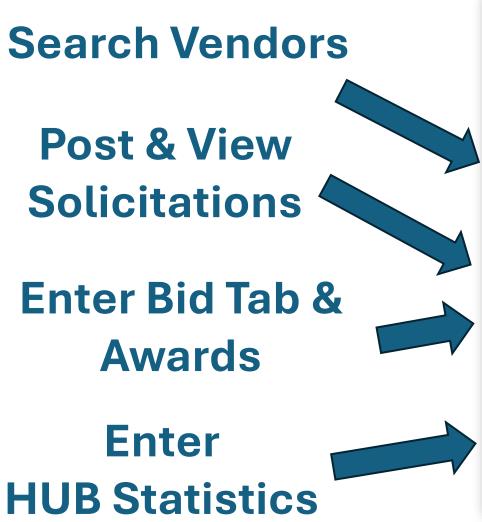


eVP PUBLIC PORTAL





eVP AGENCY APPLICATION



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	E	eVP	Ŷ			

Activ	e Vendors $\scriptstyle{\smallsetminus}$				
	Vendor Name ↑ ~	Main Phone ~	Address 1: 👻	Primary Contact ~	Email (Primary Cont
	DiversePoint, Inc.			Bert Carrington	bert@diversepoint.n
	Tinker Growth LLC	6173195029		Napoleon Lherisson	napoleon@tinkergro
	#77 Auto Repair, Inc.			Authrine Williams	number77autorepair
	#ATHLETICUNION			Bev Carruthers	bev@athleticunion.c
	& Marketing Inc.			Morten Kristensen	info@andmarketing.
	(C&M) CIEANING WIT			Mary Andrews	maryandrews90@gn
	(DBA) Triad Cremation	3362751005		Jeremy Groce	jgroce1985@gmail.c
	And Moore, LLC			Trevor Moore	tjmoor2004@gmail.o
	/the conversation coach			Michele Stills-Davis	michele@coachthec
	@thesavageway, LLV			Paula Bartlett	paula@thesavagewa
	{{firstname}} LLC			Allison Gannon	allison@firstname.co
	043090129	8004522344		Anne Marcin	sales@laser-labs.con
	1 Beyond, Inc			Marion Dancy	marion@1beyond.co
	1 Brothers Constructio			James Marshall	1brothersconstruction
	1 GLOBAL SOURCE SO	7572859469		Shanda Mitchell	sbm_1@icloud.com
	1 LOVE 1 LYFE SOLUTI			Kareen McCord	jae_kae@1love1lyfes



eVP STATISTICS

Almost **7,000** Solicitations (~1,200 eBid)

More than **4,000** Bid Responses



Over **5,500** HUB Certifications

Almost **3,000** NCSBE Certifications This shows the **great work** of procurement users, the HUB Office, and vendors!



The **Description field is editable** and transfers to eVP posting



Updates can be made to Special Circumstances and Solicitation Vehicle

Reference Document attachments appear in eVP



RECENT UPDATES – POSTING IN eVP

Column for Bid Attachment Yes/ No on Bids Tab Solicitations in Bid Attachments will be removed 90 days after Awarded or Canceled

Draft documents and solicitations can be deleted



Solicitations in Pending Selection can be canceled by addendum

There is a



RECENT UPDATES – PUBLIC eVP / BID TABULATION



Bid Tab records **can be deleted** in Draft status

> Documents are removed for canceled solicitations

Public Vendor Search has improved Bid Tab can change between Vendor Totals/ Bid Items in Draft status

Increased display of Tabulation, Addenda, and Awards

Public Solicitation Search has improved



PROCUREMENT REQUEST eFORMS – COMMUNITY COLLEGES & UNIVERSITIES

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Procurement Request eForms are standardized electronic forms created in NC eProcurement to request approval from P&C for certain strategic sourcing actions.

The eForms are only available in **Expert View of the State** Agencies NCFS realm of NCEP.

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Any Document V Search using Title, ID, or any other term				;) (*.	

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			Analytical Report	Quick Quote Posting		
Sourcing Project \vee Search using Title, ID, or any other term		D, or any other term	Compound Report	Quick Survey		
			Contract Request (Procurement)	Sourcing Project		
Common Actions	\sim	To Do	Contract Workspace (Procurement)	Sourcing Request		
Create			Knowledge Project	Special Delegation Request eForm		
PIP eForm - Non NCEP Sourcing			PIP eForm - Non NCEP Sourcing	Statewide Term Contract Management eForm		
Statewide Term Contract Management eForms			Procurement Matter of Record eForm	Supplier Research Posting		
Procurement Reques	at eForms (Non-		Procurement Request eForms (Non-Sourcing)			

Community Colleges and Universities use these eForms.

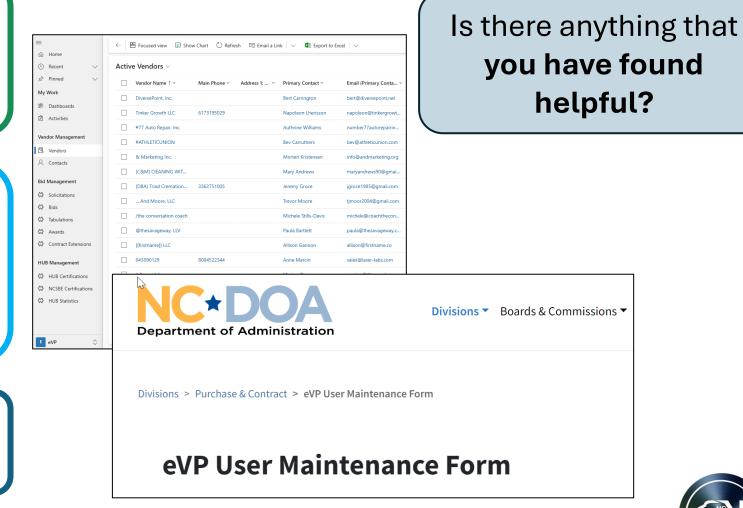


REMINDERS, TIPS & TRICKS

The **P&C eVP eForm** should be used to request new access or update existing user access.

Make sure to **POST** Addenda, Tabulations, Awards, and Contract Extensions. Records are **ACTIVE**, but not official/ public until posted.

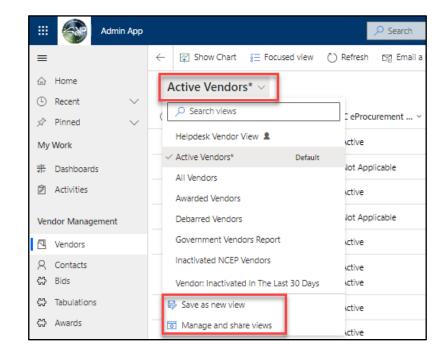
Users can **customize** filters, views, and dashboards.





CUSTOMIZING eVP VIEWS

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s			+ Add columns 🦻 Reset to default
	Edit	t columns	🔤 Vendor Name
HUB Certification St ~		NCSPE Co	Also Main Phone
nob certification 5t *	Hob Certificatio	NCSDE CE	Address 1: City
			Primary Contact
Not Certified	Female	-	🔤 Email (Primary Contact)
			HUB Certification Status
		_	HUB Certification Category
		_	NCSBE Certification Status
		_	Status Reason
			⊞ Created By



- 1. Click "Edit Columns" in the top right
- 2. Once you've created a view you prefer, click the current view name in the top left and select **"Save as new view"**
- 3. "Manage and share views" allows you to organize saved views as well as share



CUSTOMIZING eVP VIEWS - ACTIVITY

1) **Discuss** a routine procurement task you regularly perform in the electronic Vendor Portal (eVP).

2) Identify one task where having a custom view for Vendors or Solicitations could help reduce the time it takes to complete it.

3) Describe the task and specify the fields to be included in your custom view.



What information do you look for in eVP?



CUSTOMIZING eVP VIEWS

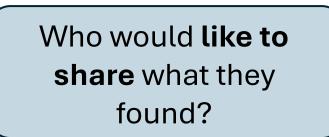
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My Work	O <u>DiversePoint, Inc.</u>	Active			Bert Carrington	bert@diversepoint.net	Verified
# Dashboards	#ATHLETICUNION	Not Applicable			Bev Carruthers	bev@athleticunion.com Not Certified	Pending
Activities	& Marketing Inc.	Active			Morten Kristensen	info@andmarketing.org	Verified
Vendor Management	(C&M) CIEANING WITH	Not Applicable			Mary Andrews	maryandrews90@gmail.c	Pending
🔁 Vendors	(DBA) Triad Cremation &	Active	3362751005		Jeremy Groce	jgroce1985@gmail.com	Verified
A Contacts	And Moore, LLC	Active			Trevor Moore	tjmoor2004@gmail.com	Verified
Bid Management	/the conversation coach	Not Applicable			Michele Stills-Davis	michele@coachtheconver	Pending
公 Solicitations	{{firstname}} LLC	Active			Allison Gannon	allison@firstname.co	Verified
않 Bids	043090129	Active	8004522344		Anne Marcin	sales@laser-labs.com	Verified

New saved view with added columns for **"NC eProcurement Registration Status"** and **"IRS Verification Status"**



CUSTOMIZING eVP VIEWS – WRAP UP





- 1) What are some of the routine procurement tasks you regularly perform?
- 2) Which task did you determine a custom view for Vendors or Solicitations could help?
- **3) How** do the added fields help solve the task?



What are some of the **useful ideas** that were shared?





QUESTIONS & DISCUSSION



What **questions** do you have?



SUPPORT

Resources are available for all users:



Contact the NC eProcurement Help Desk

- Agents available Monday Friday, 7:30 a.m. 5 p.m.
- 888-211-7440, Option 3
- <u>ephelpdesk@its.nc.gov</u>

Self Learning Paths

- Customized role-based Learning Paths
- Video walk-through guides
- Printable job aids with screenshots
- eprocurement.nc.gov/training

Regular Virtual Training Sessions

- Register through P&C's LMS
- <u>https://eprocurement.nc.gov/training-opportunities</u>

Thank you for **joining us** today!



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