

# NCEP Guided Sourcing

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

The logo features the word 'PEAK' in large, white, sans-serif capital letters. A white arrow curves upwards from the bottom left of the 'A' to the top right of the 'K'. Below the logo, the tagline 'SMARTER PROCUREMENT FOR PUBLIC GOOD' is written in white, sans-serif capital letters.

PEAK  
SMARTER PROCUREMENT  
FOR PUBLIC GOOD

# What is Guided Sourcing?

**Guided Sourcing is a comprehensive tool that allows State Agency users to manage solicitations.**

**It also allows for vendors and entities to easily communicate during a public solicitation.**

The screenshot displays the 'Tasks' section of a software interface. At the top, there are navigation tabs: 'Project summary', 'Process', 'Project insights', 'Tasks' (selected), 'Events and other documents', and 'Project message board'. Below the tabs, the 'Tasks' section is titled with a dropdown arrow and 'Tasks'. On the right side, it shows 'All (32)' and 'Assigned to me (2)'. There is a search bar with a magnifying glass icon and a refresh icon. To the right of the search bar are buttons for 'Sourcing Resources' (dropdown), 'Create' (dropdown), 'Cancel optional tasks', and 'Delete'. Below these are icons for sorting (down arrow), filtering (up arrow), and a gear icon. The main content is a table with the following columns: 'Phases and tasks', 'Type', 'Status', 'Owner', 'Due date', 'Approvers or reviewers', and 'Associate a document'. The table contains several rows of tasks, including phases and specific tasks like 'Upload Non-IT Procurement Intake Form\*'. Each row has a checkbox on the left and a small icon on the right.

Phases and tasks	Type	Status	Owner	Due date	Approvers or reviewers	Associate a document
<input type="checkbox"/> 01 - IDENTIFY AND VALIDATE BUSINESS NEED	Phase	In Progress	PO Project Owner			
<input type="checkbox"/> Upload Non-IT Procurement Intake Form*	To do	In Progress	G GuidedSourcing03			
<input type="checkbox"/> Confirm Sourcing Team Members and Roles	To do	Not Started	PO Project Owner			
<input type="checkbox"/> 02 - DEVELOP SOURCING STRATEGY	Phase	Not Started	PO Project Owner			
<input type="checkbox"/> 03 - DEVELOP SOURCING EVENT	Phase	Not Started	PO Project Owner			
<input type="checkbox"/> 04 - REVIEW AND APPROVE SOURCING EVENT	Phase	Not Started	PO Project Owner			

# Recent Updates

## **RFIs can be marked 'Complete'**

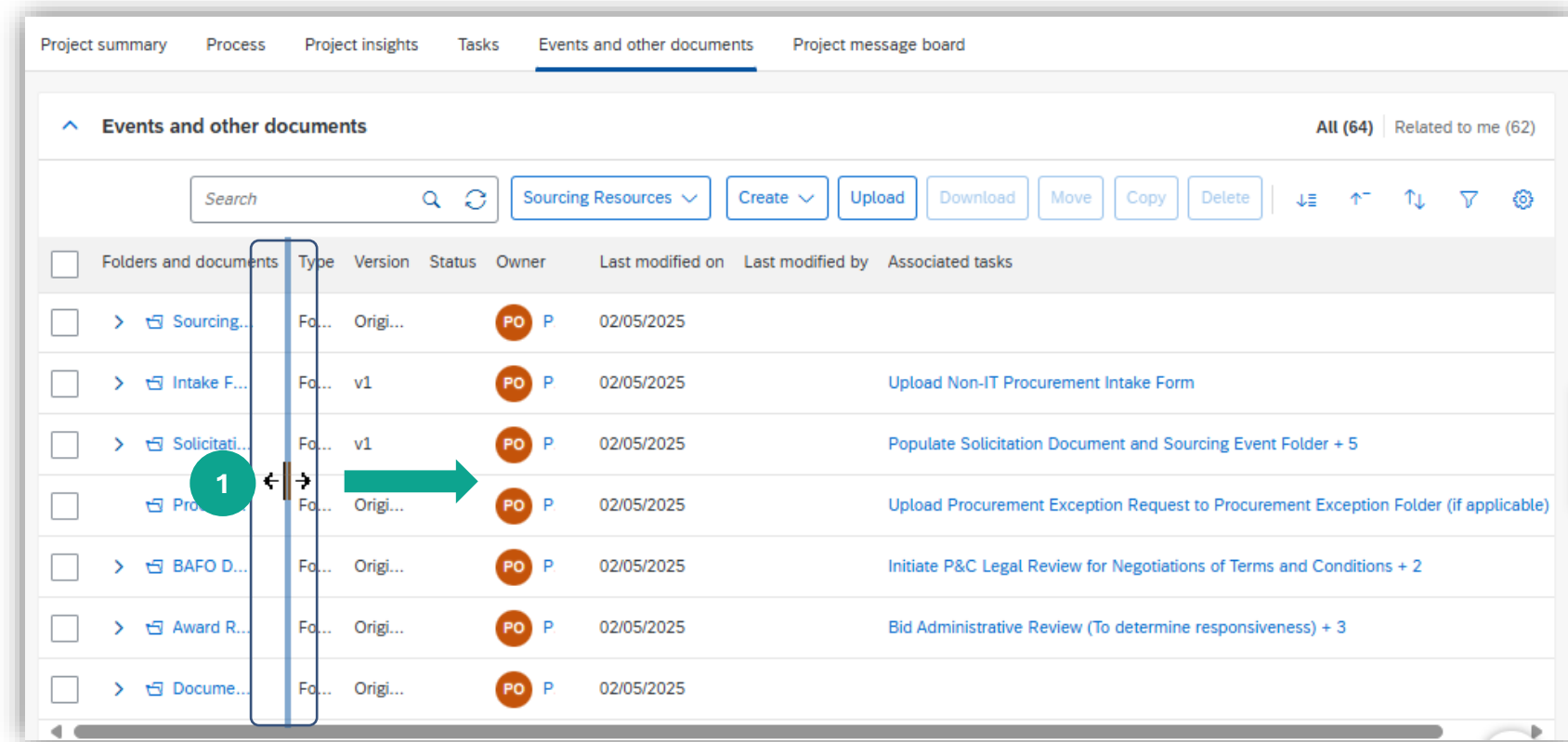
In eVP, if a posting is an RFI and will not be awarded, it can now be completed

## **Multiple Commodity Codes**

When posting a solicitation, up to 6 commodity codes can now be selected



# Tip 1 – Adjust Sourcing Project Sections



1 Left click to the right of a column and drag right to expand the column width to see full document/task names

# Tip 2 – Predecessor Tasks


000 ▾ / 06 - NEGOTIATE AND AWARD / Gain P&C Approval of Award Recommendation Packet Close

## Gain P&C Approval of Award Recommendation Packet

Approval | Not Started | TSK1454221147

[Task details](#) [Associated document](#) [Task type and process](#) [Comments and activity history](#)

**2**

 All predecessor tasks or phases must be complete before you can start this item. Phase and task predecessors are listed under **Dependency settings**. To display **Dependency settings** for a task, select **Show more**.

### Task details

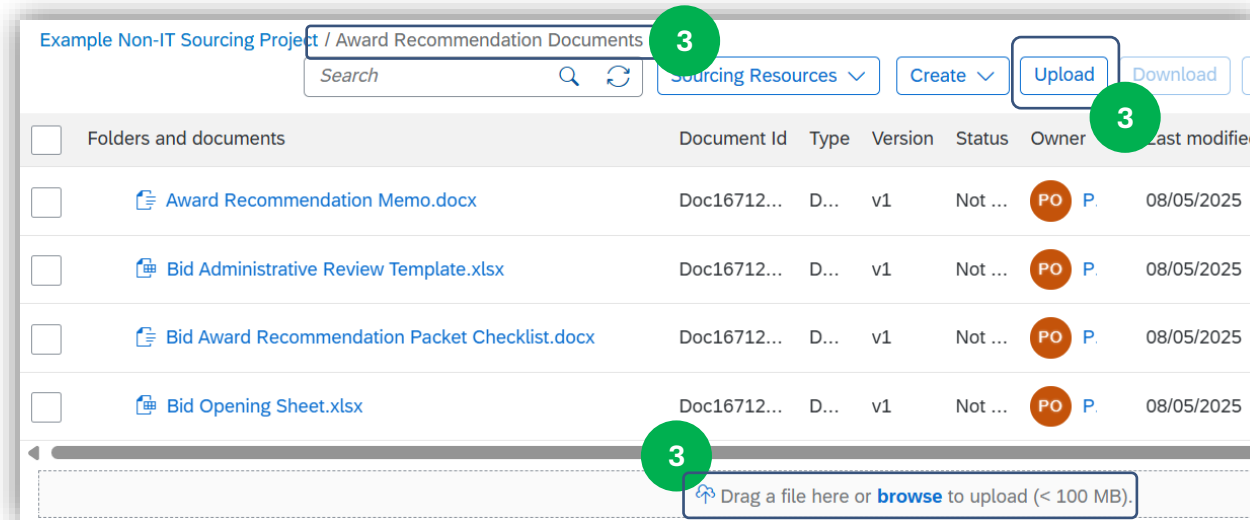
#### General information Edit

Name *	Owner * ⓘ	Due date ⓘ
Gain P&C Approval of Award Recommendation Packet	Project Owner	None

[Show more](#) **2**

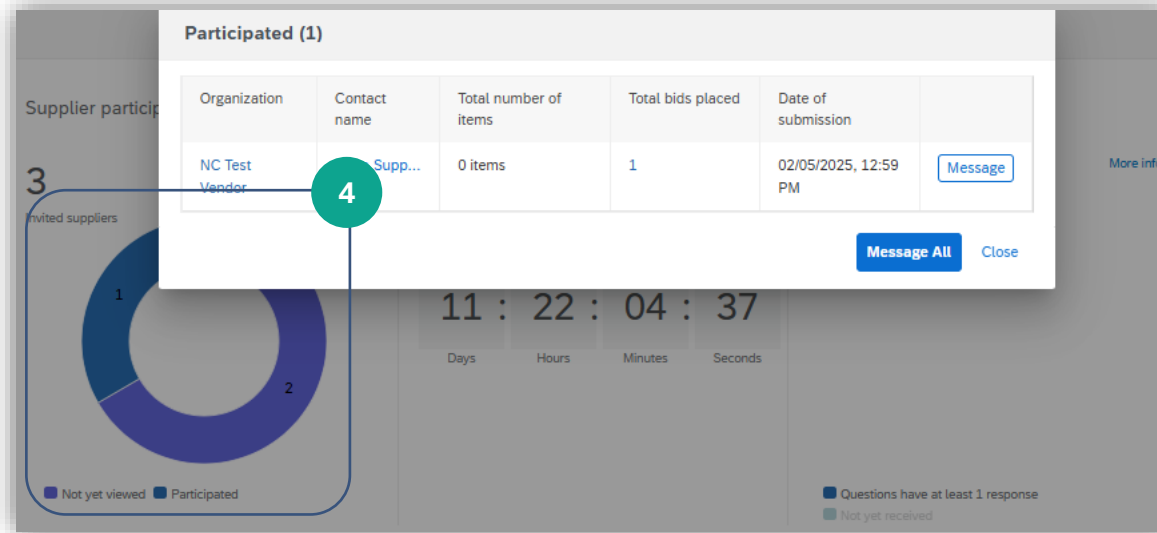
- 2** Some tasks have predecessor tasks that must be completed before the current task can be actioned. Click the **Show more** link to find out which task is incomplete if the task can't be actioned. The **lightbulb icon** is a clue that you need to complete a predecessor task.

# Tip 3 – Document Management



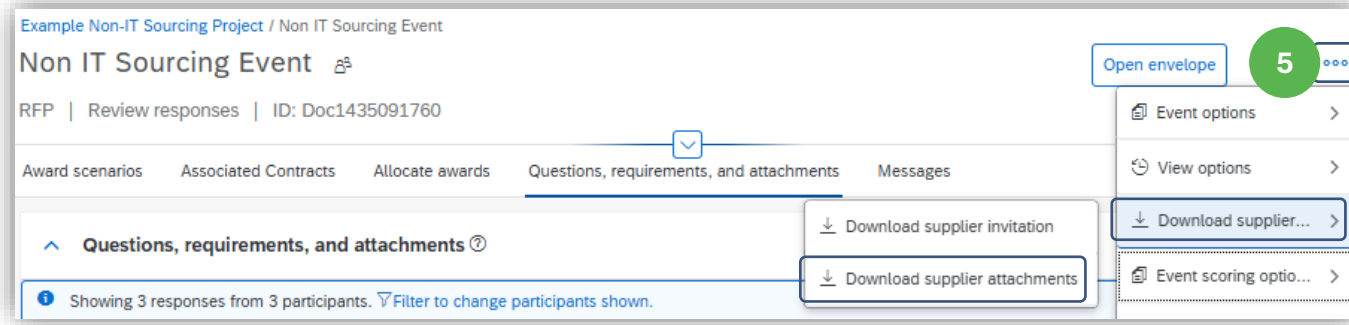
Multiple documents can be uploaded to a folder at the same time! Click into the folder and use the **Upload** button at the top or the drag/browse section at the bottom and select as many files as need to be uploaded. Zip files are also accepted.

# Tip 4 – Vendor Monitoring



- 4 Suppliers display on a color-coded graph. Click into a specific portion of the graph to see details about those vendors.

# Tip 5 – Accessing Vendor Responses



5

After clicking 'Open Envelope', download all supplier attachments at once by clicking the three dots in the top right, then selecting **Download supplier information** and **Download supplier attachments**

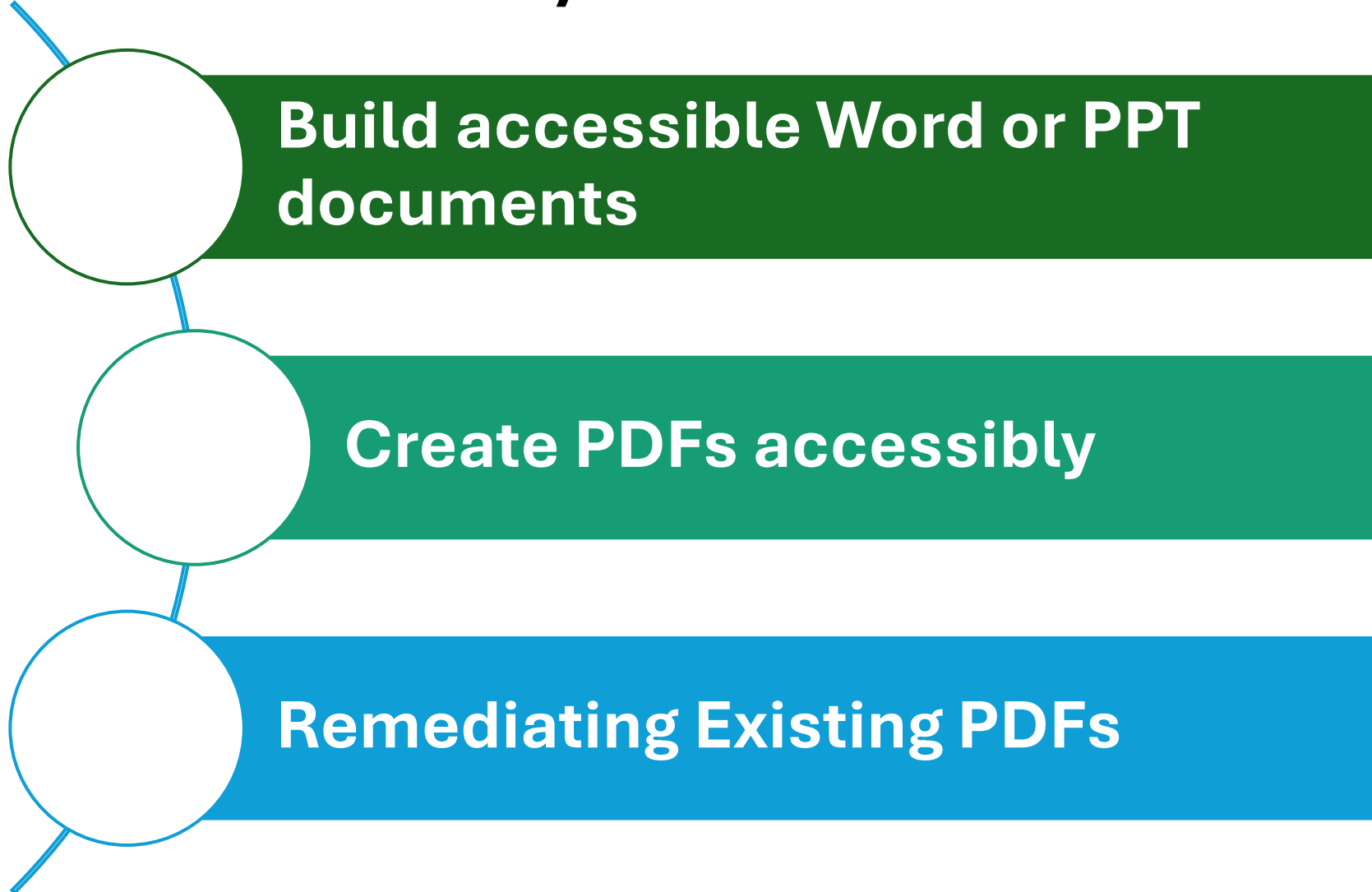
# Users Tips

**What are some tips you have found in Guided Sourcing?**

**Does anyone have a new feature that they appreciate?**



# PDF Accessibility



# Accessible Word & PPT

Practice	How To
<b>Heading Styles</b>	Use built-in Heading 1, Heading 2, etc. Do not skip levels (e.g., no H1 → H3). Format → Styles panel.
<b>Alt Text on Images</b>	Right-click image → Edit Alt Text. Describe the image's meaning. Leave blank only for decorative images.
<b>Real Lists</b>	Use the Home → Bullets or Numbering toolbar — never manually type • or 1. 2. 3.
<b>Accessible Tables</b>	Keep tables simple. Right-click top row → Table Properties → check “Repeat as header row.” Avoid merged/split cells.
<b>Descriptive Hyperlinks</b>	Use meaningful link text (e.g., “View STC search guide”) — never “Click here” or a bare URL.
<b>Accessibility Checker</b>	Word/PowerPoint → Review tab → Check Accessibility. Resolve all Errors before saving.

# Create PDFs Accessibly

File

Save As

Select  
PDF

Go to Options

Check  
“Documents  
structure tags for  
accessibility”

Save

Run Full Check in  
Acrobat

# Remediating Existing PDFs

Practice	How To
<b>Run an Accessibility Check</b>	Adobe Acrobat Pro → All Tools → Prepare for Accessibility → Check for Accessibility.
<b>Review the Report</b>	Address all Failed items: missing tags, reading order, missing alt text.
<b>Remediation Plan</b>	P&C has a remediation plan for historical files. Contact Operations & Systems Support for updates.
<b>Historical Solicitations</b>	Some older solicitations may meet ADA exception criteria. Review the ADA 2024 Web Rule.

# NC eProcurement Portal

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Access NC eProcurement

**NCEP Sourcing & Contracts Login**  
Access NCEP Sourcing & Contracts

**eVP Procurement User Login**  
Access eVP Agency App to create and manage Solicitations and submit HUB Reports

**eVP Public View**  
Access Vendor Login, Solicitations, Contract Extensions and Public Vendor Search

Have you checked out the training page?

eprocurement.nc.gov



**PEAK**  
**THANK YOU!**

**NC eProcurement / eVP Help Desk**

888-211-7440

[vendor@nc.gov](mailto:vendor@nc.gov)

[eprocurement.nc.gov](http://eprocurement.nc.gov)