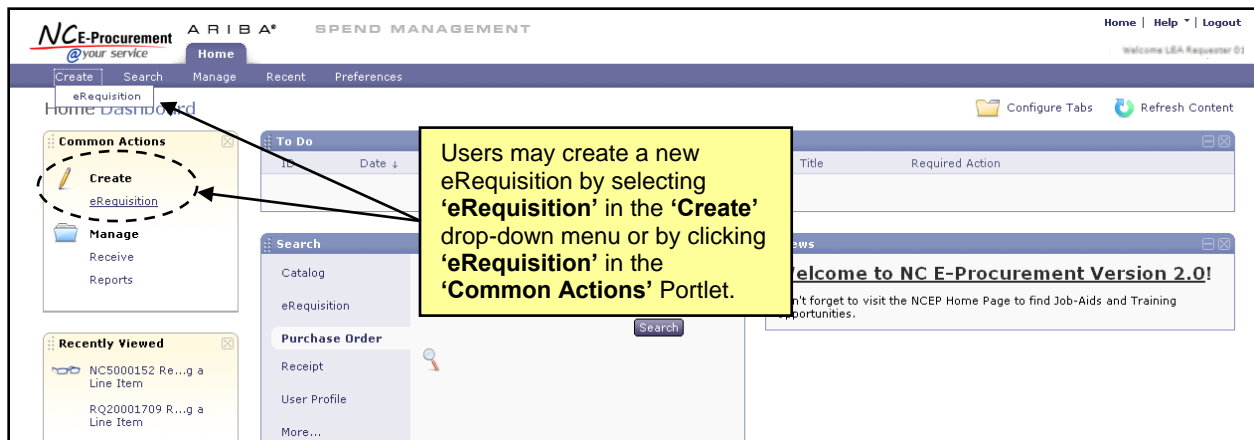




I. School Bus eRequisition Item

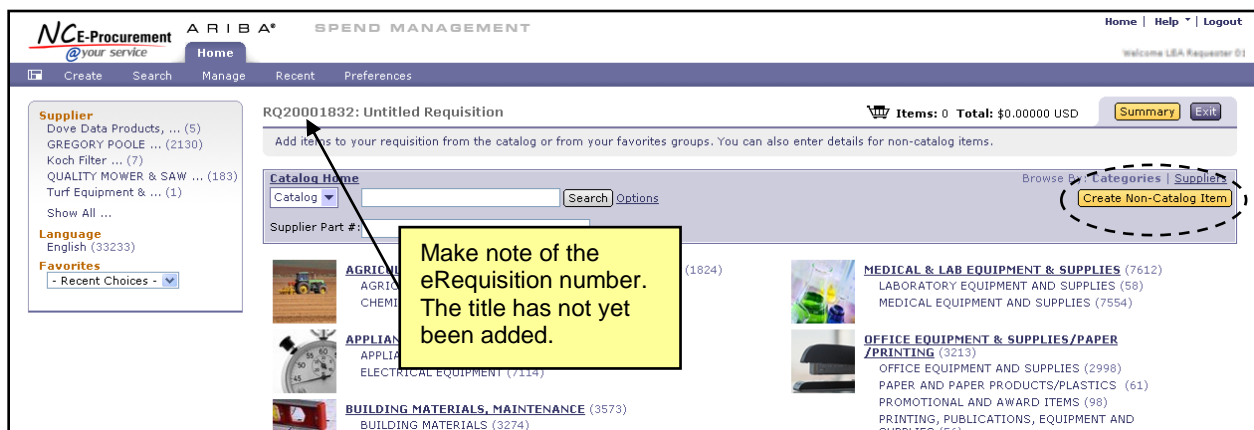
Users may create eRequisitions for School Buses in NC E-Procurement. This process guide outlines the steps for creating an eRequisition for school bus purchases referencing the appropriate Contract ID to enable accurate statewide reporting for 070C and 070D.

1. From the NC E-Procurement Dashboard, click **'eRequisition'** from the **'Create'** Shortcut Menu on either the Menu Bar or the **'Common Actions'** Portlet.



2. Click the **'Create Non-Catalog Item'** button to enter non-catalog information.

Note: View and note the eRequisition number. The eRequisition title has not yet been added.





- 3. Full Description:** Enter a description of the item being purchased. Be sure to enter as much detail as necessary for the supplier to accurately fulfill the item (e.g., color, dimensions, etc).
- 4. Commodity Code:** Locate the appropriate commodity code that describes the item being purchased by using the drop-down menu. If a desired commodity code is not listed in the drop-down menu, select **'Search for more...'** to search for the appropriate code. Users may search by commodity code or keyword (e.g., 070-33 - School Buses, Complete, Conventional Type).

Note: It is important to select the appropriate commodity code as the State of North Carolina uses this for reporting purposes. The commodity codes listed are part of the National Institute of Governmental Purchasing (NIGP) commodity code structure. Commodity codes that begin with a '9' describe service type commodities. These codes should not be used when purchasing goods.

The screenshot shows the 'Choose Value for Commodity Code' dialog box in the NCE-Procurement system. The dialog has a search field at the top with a 'Search' button. Below it is a table of commodity codes. The first section is expanded, showing a list of codes under the header '883-00 - VOICE RESPONSE SYSTEMS'. The codes listed are: 883-16 - Audiotex Voice Response Systems, 883-18 - Auto Attendant Telephone Systems, 883-19 - Automatic Call Distribution (ACD) Systems, 883-32 - Computer Telephony Integration (CTI) Systems, 883-43 - Interactive Voice Response (IVR) Systems, 883-64 - Recycled Voice Response Systems, Accessories and Supplies, 883-80 - Telephone Switching (PBX) Systems, and 883-90 - Voice Mail Systems. Each code has a 'Select' button next to it. Below this section, there are other commodity code sections, including '885-00 - WATER AND WASTEWATER TREATING CHEMICALS', '890-00 - WATER SUPPLY, GROUNDWATER, SEWAGE TREATMENT, AND RELATED EQUIPMENT (NOT FOR AIR CONDITIONING, STEAM BOILER, OR LABORATORY REAGENT WATER)', '895-00 - WELDING EQUIPMENT AND SUPPLIES', '898-00 - X-RAY AND OTHER RADIOLOGICAL EQUIPMENT AND SUPPLIES (MEDICAL)', and '905-00 - AIRCRAFT AND AIRPORT OPERATIONS SERVICES'. A yellow callout box points to the '883-00' header with the text: 'Expand the commodity code drop-down menu to view a more detailed listing of commodity codes under the selected header.' Another yellow callout box points to the '905-00' entry with the text: 'Commodity codes in the 900s range refer to services.'

- 5. Supplier:** Locate the supplier in the drop-down menu. If the supplier is not listed in the drop-down menu, choose **'Search for more...'** to search for the appropriate supplier.
- 6. Location:** Click on **'Select'** if a different location for the supplier is preferred.
- 7. Supplier Part Number:** Enter the Supplier Part Number (if known). This will assist the vendor in shipping the correct item.



8. **Recycled Content:** Select the appropriate radio button to reflect whether or not the item contains recycled products.
9. **Item Classification:** This field will automatically populate to either Good or Service based on the commodity code that has been chosen.
10. **Contract Type:** Select the appropriate contract type. Options are Statewide, Agency Specific, and IT Convenience.

Note: For School Bus purchases, **'Statewide'** should be selected from the drop-down menu. This will add an additional **'Contract'** field to the eRequisition, and contract **'070C – Buses, School (Conventional)'** or **'070-D – Buses, Activity (Conventional)'** should be added to the **'Contract'** field. Entering the correct contract information allows the State of North Carolina to accurately track and report against these School Bus purchases.

The screenshot shows a form with the following fields and values:

- Recycled Content?: Yes No
- Item Classification: Good
- Contract Type: No (dropdown menu)
- Blanket Purchase?: No (dropdown menu)

Below these fields, there is a section titled "ACCOUNTING - BY LINE ITEM" with a sub-section for "Contract Type" set to "Agency Specific" and a "Contract:" field. An "Update Total" button is visible on the right side of the form.

11. **Blanket Purchase:** Choose whether the purchase is a Blanket or Non-Blanket.
12. **Quantity:** Enter the appropriate Quantity.
13. **Unit of Measure:** Locate the appropriate Unit of Measure in the drop-down menu. If the desired Unit of Measure is not listed in the drop-down menu, choose **'Search for more...'** to find the appropriate value.
14. **Price:** Enter the Price of the item.
15. **Tax Rate:** Enter the Tax Rate for the item being purchased. If no taxes should be applied to the item, select **'Other.'**
16. **Tax Amount:** This field automatically calculates based on the selected Tax Rate. Users may enter a specific Tax Amount in this field when the Tax Rate of **'Other'** is selected.

Note: For tax-exempt State Agencies, the Tax Rate will default to **'Other'** to prevent tax from automatically appearing on purchase orders. The default Tax Rate for non-exempt State Agencies can be set to the appropriate agency specific rate.

Note: Shipping/Freight charges should be included as a separate line item using the freight commodity code, **'962-86 – Services: Transportation of Goods (Freight)'** to so that the supplier is not charged the 1.75% transaction fee for this service.

17. **Amount:** This field is automatically calculated based on the information entered above.
18. **Accounting – by Line Item:** Enter the **'Account Code.'**



NC E-Procurement @ Your Service eRequisition Course School Bus eRequisition Item Process Guide

19. Click 'OK.'

Note: The shopping cart is automatically displayed after each item is added to the eRequisition.

20. Click the 'Add Non-Catalog Item' to return to the Add Items page and select additional items or update all other required and optional fields, such as 'Title,' and click 'Submit.'