

# Collaborative Requisitioning

## Introduction

Collaborative Requisitioning is the informal quoting and pricing request function within the NC eProcurement system. When purchasing quantities of items over the typical purchasing threshold for normal buying policies, but under the threshold for a formal bidding process, users can use Collaborative Requisitions to obtain quotes for goods and services from multiple vendors at the same time.

Collaborations are started on individual line items on a Purchase Requisition (PR), meaning that on a PR containing multiple line items, you can have both collaborative and non-collaborative items as required. In addition, Collaboration can only be enabled while in Expert View. The monetary thresholds for informal and formal bidding processes are dictated by your purchasing department. Consult your purchasing director if there are questions about when to use either process.



## Learning Objectives

At the end of this job aid, **you will be able to:**



Begin a Collaboration as an requester.



Enable a Collaboration as an approver.



Finish a collaboration.

# Collaborative Requisitioning

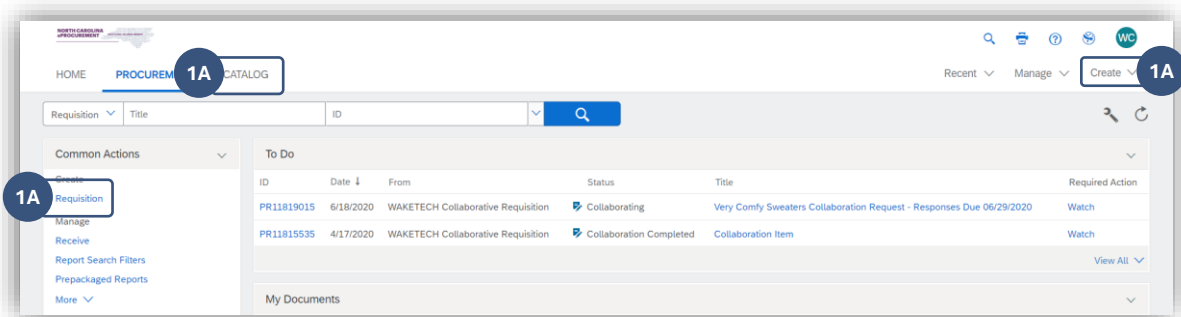
## Entering Item Details

- 1 Before starting collaboration with vendors, users will need to create a non-catalog item. To begin the process, users will need both the ability to create Purchase Requisitions (PRs) as well as the correct permissions to Enable Collaboration with vendors.

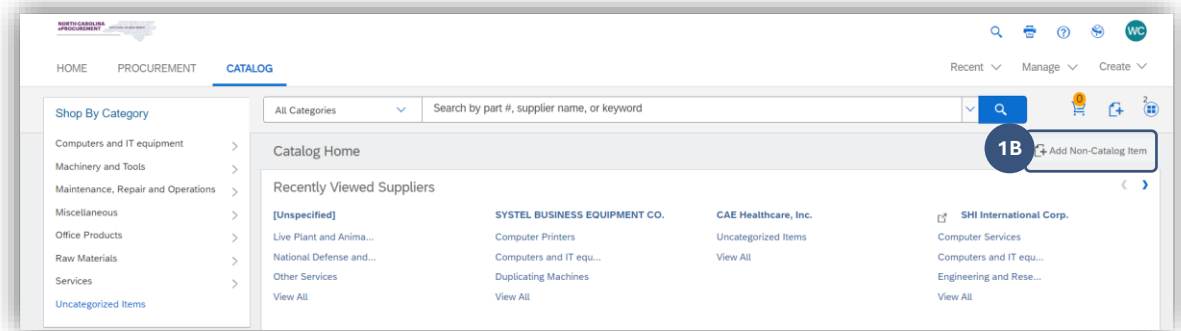


Approvers with the Edit capability that would like to enable Collaboration on an already submitted PR, please move to Section 3: Enabling Collaboration as an Approver.

- A. In Expert View, navigate to the Catalog by either selecting the tab on the top of the screen, or by using the **Create** drop-down menu and selecting **Requisition**.



- B. In the upper right of the Catalog, select **Add Non-Catalog Item**.



- C. Fill in all required line item details.

1. When creating a Collaborative line item, users should leave the **Price** field at \$0.
2. Leave the Supplier field blank. Suppliers will be selected after enabling Collaboration.
3. Make sure that the **Description** has all details that a vendor will need in order to give you an accurate quote for the goods or services being requested.

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For more information on line item creation, please reference the Expert View Purchase Requisitions guide.

The screenshot shows the 'Create Non-Catalog Item' form. Key fields include: Full Description (Sample Collaboration Items), Commodity Code (501820 - Cakes and pies and pastries), Quantity (200), Unit of Measure (each), Price (\$0.00000 USD), Amount (\$0.00000 USD), Supplier (No Preference), and an 'Enable Collaboration' button on the right side.

## Beginning Collaboration as the Requester

2 Enabling Collaboration can only be done in Expert View. Enablement can be started on a new requisition, or on a Submitted PR that falls under the purchasing policy requirements to solicit quotes from vendors.

A. On a newly created Non-Catalog Item, click the blue **Enable Collaboration** button on the right side of the screen to start the Collaboration process.

The screenshot shows the 'Create Non-Catalog Item' form with the 'Enable Collaboration' button highlighted. The button is located on the right side of the form, under the 'Collaborate With Suppliers' section.

B. Once selected, the button will change to read **Disable Collaboration**, letting you know the Collaboration process has begun.

1. Next to the **Price** field, a drop-down menu will appear. Leave this option on the default value **Negotiable**.
2. Another new field, **Hide Item Price from Suppliers**, is located below Price. Check the box on this field to mask the items unit price from vendors while they are participating in Collaboration.

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2B

2B

C. To invite Suppliers to Collaborate, click the revealed **Change** button in the Supplier Information section.

D. On the next page, click **Add New Supplier...** to open the list of currently active NC eProcurement vendors in the system.

1. To search, type the full or partial company name for a vendor listed in the electronic Vendor Portal (eVP). Any misspellings in the search will bring back incorrect or no results at all.
  - i. To search for vendors using more company registration information, please see Section IV: Using eVP to Find Vendors. Some information, such as vendors with HUB status information, can also be found in the Supplier Search before enabling Collaboration.
2. Choose a vendor to request Collaboration with by clicking the **Select** button to the right, or click **Done** to close the pop-up.
3. Add suppliers using the **Add New Supplier...** button until purchasing requirements are met and click **OK** to go back to the line item page.

2D

E. Confirm that the selected suppliers now appear under the Supplier Information section.

F. Under the Supplier Information section, set the **Bidding Type** drop-down to **Open - Amount** to enable vendors to see the leading bid.



Do not create a **New** bidding type as that may cause system issues.

G. When the line is ready to be submitted, click **Add to Cart**.

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H. Click **Proceed to Checkout** to go to the PR Summary page.

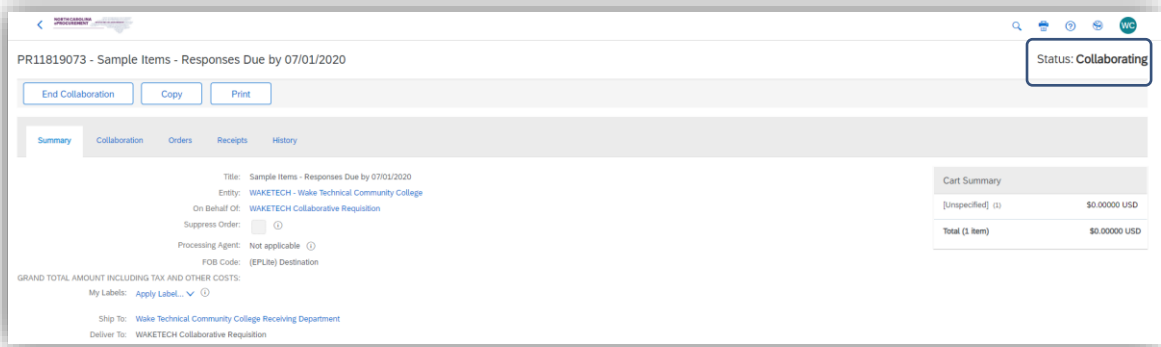
I. When titling the PR, make sure to put a Response Due Date in the title, e.g. **“Sample Items – Responses Due By 07/01/2020”** to inform the vendor when quotes are due for submission. There is no Due Date field in Collaborative Requisitioning.

1. Selecting the **Visible to supplier** option will send comments and attachments to vendors after the PR is fully approved, **after Collaboration is completed**.
2. To make comments and attachments available to vendors **during Collaboration**, check the **Visible to supplier during collaboration** box.

J. Navigate down to the line item on the Summary page, check the box next to the line item going into Collaboration, and use the **Actions** drop-down to Edit the line and add accounting information, then click **Ok** to go back to the PR Summary screen.

K. Once all required fields are filled out, press **Submit**. Depending on the approval flow for your entity, the order will either move into Submitted or Collaborating status.

# Collaborative Requisitioning



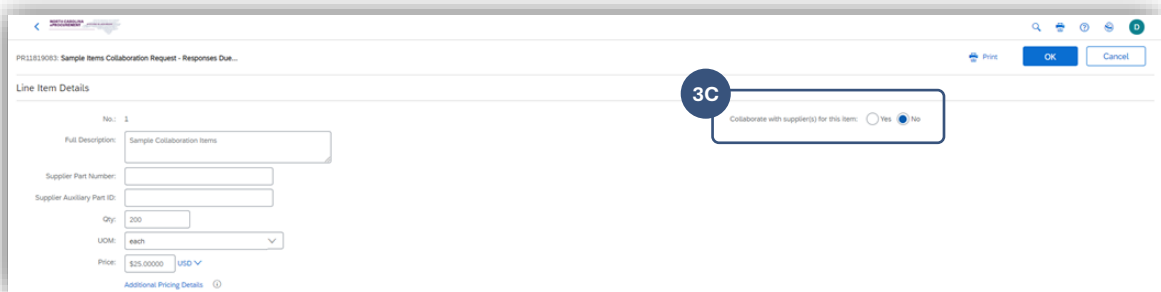
Orders that do not move into Collaborating status after clicking **Submit** may need additional approval before being sent out for Collaboration. Check the Approval Flow to see how many approvals are required before the PR reaches Collaboration status.

## Enabling Collaboration as an Approver

3 As an Approver, enabling Collaboration can only be done in Expert View. Approvers will need both the ability to edit submitted Purchase Requisitions (PRs) as well as begin Collaboration on a submitted line item. Not all users will have both or either capabilities.

For further information on approving and editing line items, please see **Approving a Requisition**.

- A. In Expert View, select the PR either the **ID**, **Title**, or **Approve** link, then click the **Edit** button.
- B. Scroll down to the line items on the Summary page, check the box next to the line that needs Collaboration with vendors, and use the **Actions** drop-down to select **Edit Details**.
- C. In the upper right of the line item details page, select the **Yes** radio button next to the **Collaborate with supplier(s) for this item** field.



- D. Once selected, several fields will be added to the line item details, and the Invited Suppliers section will appear on the right.
  - 1. Set the **Price** to \$0.
  - 2. Next to the **Price** field, a drop-down menu will appear. Leave this option on the default value **Negotiable**.
  - 3. Another new field, **Hide Item Price from Suppliers**, is located below Price. Check the box on this field to mask the items unit price from vendors while they are participating in Collaboration.
- E. To invite Suppliers to Collaborate, click the revealed **Change** button in the Supplier Information section.

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F. On the next page, click **Add New Supplier...** to open the list of currently active NC eProcurement vendors in the system.

1. To search, type the full or partial company name for a vendor listed in the electronic Vendor Portal (eVP). Any misspellings in the search will bring back incorrect or no results at all.
  - I. To search for vendors using more company registration information, please see Section 4: Using eVP to Find Vendors. Some information, such as vendors with HUB status information, can also be found in the Supplier Search before enabling Collaboration.
2. Choose a vendor to request Collaboration with by clicking the **Select** button to the right or click **Done** to close the pop-up.
3. Add suppliers using the **Add New Supplier...** button until purchasing requirements are met and click **OK** to go back to the line item page.

G. Confirm that the selected suppliers now appear under the Supplier Information section.

H. Under the Supplier Information section, set the **Bidding Type** drop-down to **Open – Amount** to enable vendors to see the winning quote once Collaboration is completed.

I. When finished with editing the line item details, click **OK** to return to the PR Summary page.

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**J.** Make sure to adjust the title to include a Response Due Date in the title, e.g. “Sample Items – **Responses Due By 07/01/2020**” to inform the vendor when quotes are due for submission. There is no Due Date field in Collaborative Requisitioning.

1. Selecting the **Visible to supplier** option will send comments and attachments to vendors after the PR is fully approved, **after Collaboration is completed**.
2. To make comments and attachments available to vendors **during Collaboration**, check the **Visible to supplier during collaboration** box.

**K.** Once all required fields are updated to include the new Collaboration details, press **Save**. Depending on the approval flow for your entity, the order will either move into Submitted or Collaborating status.

PR11819083: Sample Items Collaboration Request - Responses Due...

Summary

Title: Sample Items - Responses Due 07/01/2020

Entity: 19 - Department of Public Safety

On Behalf Of: DPS Requester

Delay Purchase Until:

Suppress Order:

ERP Reference ID: PR11819083

Buying Entity: IREG

FOB Code: (NCAS) 001 - Destination freight paid by vendor and included in price. Title passes upon receipt. Vendor files any claims.

My Labels: Apply Label...

Ship To: NAD

Deliver To: DPS Requester

Need-by Date:

Comments: Sample comment for all vendors invited to Collaboration request to see.

Visible to Supplier

Visible to suppliers during collaboration

Cart Summary

[Unspecified] (1)	\$0.00000 USD
<b>Total (1 Item)</b>	<b>\$0.00000 USD</b>

Check

**L.** To view the updated PR, use the **Recently Viewed** portlet on the Procurement tab.

PR11819083 - Sample Items - Responses Due 07/01/2020

Status: Collaborating

Copy End Collaboration Print

Summary Collaboration Orders Receipts History

Title: Sample Items - Responses Due 07/01/2020

Entity: 19 - Department of Public Safety

On Behalf Of: DPS Requester

Suppress Order:

ERP Reference ID: PR11819083

Processing Agent: Not applicable

Buying Entity: IREG

FOB Code: (NCAS) 001 - Destination freight paid by vendor and included in price. Title passes upon receipt. Vendor files any claims.

My Labels: Apply Label...

Ship To: NAD

Deliver To: DPS Requester

Need-by Date:

Cart Summary

[Unspecified] (1)	\$0.00000 USD
<b>Total (1 Item)</b>	<b>\$0.00000 USD</b>



Orders that do not move into Collaborating status after clicking **Submit** may need additional approval before being sent out for Collaboration. Check the Approval Flow to see how many approvals are required before the PR reaches Collaborating status.

# Collaborative Requisitioning

## Using eVP to Find Vendors

4

Before creating a Collaborative Requisition, users may need to find active eProcurement vendors that provide the goods and/or services being requested. The electronic Vendor Portal (eVP) Public Vendor Search is a convenient way to find and filter active vendors in the system capable of receiving Collaboration requests.

- A. Navigate to the [electronic Vendor Portal \(eVP\)](#) and click either the **Browse Vendors** button or the **Vendors** link at the top of the screen. Users can also use the **eVP Public View** tile link on the [eProcurement website](#) to navigate to eVP.
- B. If the vendors business name is known, populate the **Vendor Name** search field.
- C. Click the **Advanced Search** triangle to display additional search filters and select **Active** in the **NC eProcurement Registration Status** drop-down within the **NC eProcurement** section to return only vendors who are currently active and able to accept purchase orders.

The screenshot shows the search interface with the following fields and filters:

- Search:** A text input field.
- Vendor Name:** A text input field containing the word "vendor".
- Customer Number:** A text input field.
- eVP Status:** A dropdown menu with "Select" as the current selection.
- HUB Certification Status:** A dropdown menu with "Select" as the current selection.
- NCSBE Certification Status:** A dropdown menu with "Select" as the current selection.
- Advanced Search:** A dropdown menu that is currently expanded.
- NC eProcurement:** A section containing:
  - Registration Date From:** A date input field with a calendar icon.
  - Registration Date To:** A date input field with a calendar icon.
  - 4C eProcurement Registration Status:** A dropdown menu with "Active" selected.

- D. Scroll to the bottom of the screen and click the **Search** button to initiate the search.
- E. Click on the blue vendor name in the **Name** column of the desired vendor to see more information.

Name	Main Contact Name	Main Contact Email	Main Contact Phone	Main Location Address	eVP Status	NC eProcurement	HUB	HUB Category	NCSBE	Small Business	DBE	NPWC
4E NC Basic Vendor	Johnny Vendor	@yahoo.com	9194234444	123 Main St., Raleigh, North Carolina, Wake, United States, 27604	Active	Active				Yes	No	No

F. Vendors who have indicated they provide certain types of goods or services can be searched for based on related commodity codes.

1. Back on the main search page, scroll down the screen to the **Commodity & Construction Codes** section and click the **Add Commodity Codes** button.
2. On the subsequent **Lookup records** popup, use the search bar to find commodity codes by number or description. Click the magnifying glass to initiate the search.

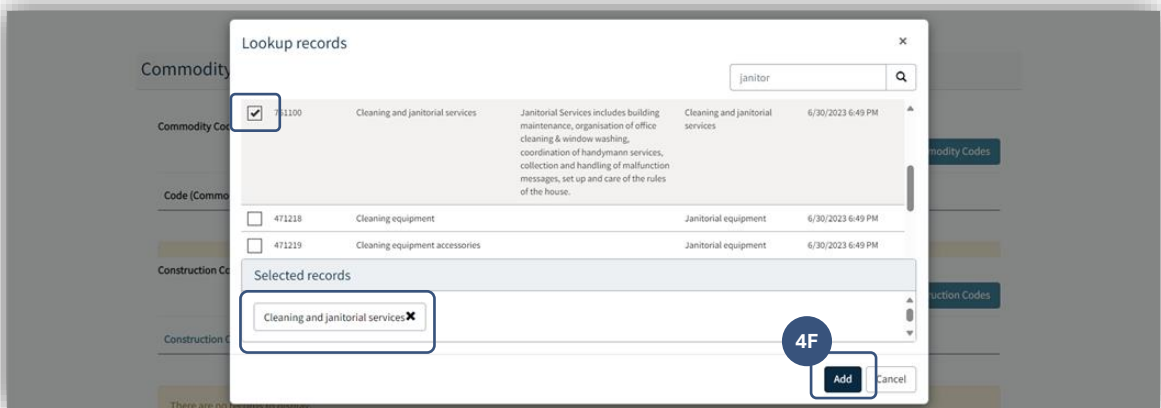
The screenshot shows the "Lookup records" popup with the following details:

- Search Bar:** Contains the word "janitor".
- Results Table:**

Code	Name	Description	Commodity Family	Created On
<input type="checkbox"/> 858611	Abdomen and lumbosacral and pelvic regions	This class includes chiropractic interventions or procedures related to the abdomen and lumbosacral and pelvic regions. These interventions or	Chiropractic interventions or procedures by anatomical region	6/30/2023 6:50 PM

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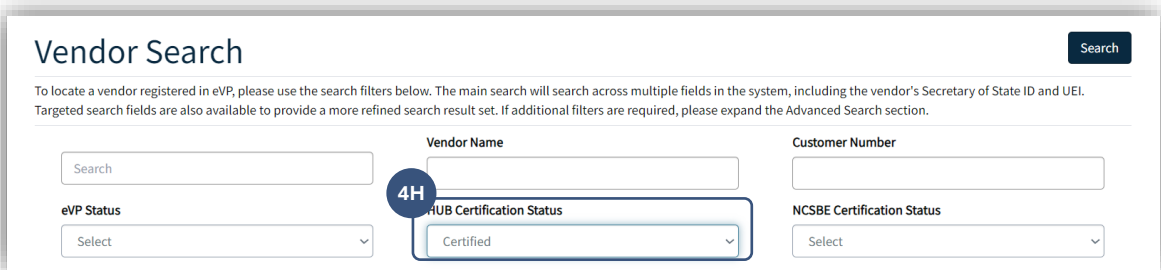
3. Check the box next to any codes of interest to add them to the search and click **Add**.



**G.** Once all relevant commodity codes have been selected, a search can be executed by selecting the **Search** button at the bottom of the page.

**H.** Additional search filters can be used to search by specific criteria in order to find more focused results.

1. Selecting **Certified** in the **HUB Certification Status** drop-down at the top of the page will limit results to vendors who are currently Certified as a Historically Underutilized Business (HUB).



2. Further down the page in the **Contact and Location** section, there are six filters that can help target specific vendors by contact or geographical location.

- I. If vendor contact information is known, the **Contact Last Name** or **Contact Email** can be entered to return the associated vendor account.
- II. Selecting a specific County from the **County** section by clicking the **Add** button will return only vendors who have entered an address located in that county. Multiple counties can be selected for the same search. The **Location City** filter is a free-text field into which even more specific localized information can be entered.



Filtering by County only works for North Carolina based vendors.

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Contact and Location

Contact Last Name

Contact First Name

Contact Email

Location Name

Location City

County

Name ↑

Durham

Wake

## I. Use a combination of fields to find vendors to begin Collaboration with.

1. Using fewer fields may result in more vendors, but less accurate results.
2. Users should contact vendors to confirm that they offer the requested goods/services before sending a Collaboration request.



All vendors registered to receive purchase orders can be selected for Collaboration requests, but in order to respond to the request they will need to register for an Ariba Network supplier account. Vendors with questions on the Ariba Network account creation process should contact the Help Desk.

## Handling Substitute Items

5

Vendors may not provide, or have available in their inventory, the goods/services being requested. In this event, vendors may offer the requester an equivalent substitute instead.

### A. If a vendor would like to offer a substitute item, they may edit the line item details, part number, and quantity in addition to offering a price without informing the buyer beforehand.

1. When reviewing Collaboration responses, covered in Section 7: Finishing Collaboration, be sure that all details match up to the original Collaboration request.
2. All changes to the line(s), including adding or removing details, can be found on the Changes tab on the vendor proposal page.

Proposal PR11819073-P339 - Sample Items - Responses Due by 07/01/2020 Status: Submitted

These are the details of the request you selected. Depending on its status, you can edit, change, copy, cancel, or submit the request for approval. You may also print the details of the request. Review your request and take the desired action(s).

Summary **Changes** History Previous Documents

Changes from PR11819073-R883: Sample Items - Responses Due by 07/01/2020

Field 1	Action
Line Item 1	
Description	
Price	changed from \$0.00000 USD to \$29.00000 USD
Supplier Part Number	changed from (no value) to 12345

# Collaborative Requisitioning

- B. Vendors may also submit a substitute item as a completely new line item instead of proposing a price for the initial Collaboration request, appearing on the Collaboration tab as a new line.

Name	Contact	Status	Qty	UOM	Price	Total
Jarvis Property Restoration	Jarvis Property Restoration	Proposal Received - Please Respond				\$6,000,000.00 USD
1. Sample Collaboration Items			200	each	\$0.00000 USD	\$0.00000 USD
2. Substitute Item			200	each	\$30,000.00 USD	\$6,000,000.00 USD
US Foods	US Foods Columbia Division	Request Sent - Waiting For Response				\$0.00000 USD
1. Sample Collaboration Items			200	each	\$0.00000 USD	\$0.00000 USD

- C. To accept the proposed substitute, choose to **Accept Proposal** when finishing Collaboration with the vendor, and use the Acceptance drop-down menu to Accept the line(s) and finish Collaborating. See Section 7: Finishing Collaboration for more information on ending the Collaboration process.

Acceptance	No.	Type	Description	Qty	Unit	Price	Amount
Not Accepted	1	Sample Collaboration Items	Sample Collaboration Items	200	each	\$0.00000 USD	\$0.00000 USD
Accepted	2	Substitute Item	Substitute Item	200	each	\$30,000.00 USD	\$6,000,000.00 USD

5C Buyers should check their purchasing policy guidelines or contact their purchasing leadership for guidance on whether to accept the substitute item(s).

# Collaborative Requisitioning

## Communicating with Vendors During Collaboration

6 Users can communicate with vendors both via the **Send Message** Collaboration tool and **Comments** section on the Purchase Requisition (PR) Summary page during Collaboration.

Users can also contact the vendor directly using information found in the electronic Vendor Portal or given by the vendor themselves during Collaboration.

A. For comments that should be seen by all vendors selected for Collaboration, users can use the Comments section on the PR Summary page.

1. Either before or during active Collaboration, navigate to the Summary page.
2. To add a new comment to the PR, click the **Add Comment** button or link.
3. After writing any pertinent information for the supplier, check the **Visible to suppliers during collaboration** box and click **OK**
4. Vendors will see any designated comments on the same screen as the line item details in their Ariba Network account.

Other users will see your comments.

Comments: Comment for all Collaboration vendors to see.

6A Visible to Supplier

Visible to suppliers during collaboration

OK Cancel

B. Users may also want to exchange messages with individual vendors using the **Send Message** tool once Collaboration has begun.

1. Select the **ID, Title, or Required Action** of a PR currently in **Collaborating** status in the To Do portlet to be brought to the Collaborating tab.

C. Click the **Request Sent** link for the chosen vendor under the Status column.

End Collaboration Copy Print

Summary Collaboration Orders Receipts History

View by:  Supplier  Line Item

Proposals Hide Details

Name	Contact	Status	Qty	UOM	Price	Total
Jarvis Property Restoration	Jarvis Property Restoration	Request Sent - Waiting For Response	200	each	\$0.00000 USD	\$0.00000 USD

Collaborate: Yes

D. Use the **Actions** drop-down in the upper right and select **Send Message**, or use the **New Message** button on the lower right

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Collaboration Request PR11819073-R881 - Sample Items - Responses Due by 07/01/2020 Status: Submitted

These are the details of the request you selected. Depending on its status, you can edit, change, copy, cancel, or submit the request for approval. You may also print the details of the request. Review your request and take the desired action(s).

**Summary**

Supplier: Jarvis Property Restoration  
My Labels: Apply Label...

▼ Line Items

1 Line Item

No.	Type	Description	Qty	Unit	Price	Amount
1		Sample Collaboration Items	200	each	\$0.00000 USD	\$0.00000 USD

Supplier: Jarvis Property Restoration

Messages Referring To This Document (All Messages) New Message

No Items

6D

- Actions
- Respond
- Send Message
- Cancel Request
- View
- Messages
- Print
- Create
- Revise Request
- Alternative Request

E. Compose the message and add any reference attachments, then click **Send**.

Compose Message Send Cancel

Create a new message that will be posted on the message board.

Subject:

Visible to Supplier:  Yes  No

Message:

Attachments:

History No Items

6E Send Cancel

F. Messages sent by both the buyer and vendor will appear in the **Messages Referring To This Document** section on the vendors Collaboration details page.

▼ Line Items

1 Line Item Hide Details

No.	Type	Description	Qty	Unit	Price	Amount
1		Sample Collaboration Items	200	each	\$0.00000 USD	\$0.00000 USD

Supplier: Jarvis Property Restoration

6F

Messages Referring To This Document (All Messages) New Message

Subject: Sample Item Question  
From: Jarvis Test (6/19/2020 6:35 PM)   
Vendor response to the first question with more details.

Subject: Sample Item Question  
From: WAKETECH Collaborative Requisition (6/19/2020 6:34 PM)   
Sample message to communicate with the individual vendor.

Attachments - Entire Collaboration Request

# Collaborative Requisitioning

## Finishing Collaboration

7

Users may end Collaboration at any time, either because the Collaboration is no longer needed or to accept a vendors submitted pricing proposal. Users can perform either action from the Collaboration tab on the Purchase Requisition (PR) currently in Collaborating status.

**A.** Select the **ID**, **Title**, or **Required Action** of a PR currently in **Collaborating** status in the To Do portlet to be brought to the Collaboration tab.

1. The Collaboration tab shows the overview and status of the Collaboration requests.
2. This tab shows all vendors added to the Collaboration request(s), if they have provided a quote, and the **Price Per Unit** and **Total** for all vendors that have responded.
3. Proposed pricing can be quickly compared on this page to determine the vendor to choose.

PR11819073 - Sample Items - Responses Due by 07/01/2020 Status: **Collaborating**

End Collaboration Copy Print

Summary Collaboration Orders Receipts History

View by:  Supplier  Line Item

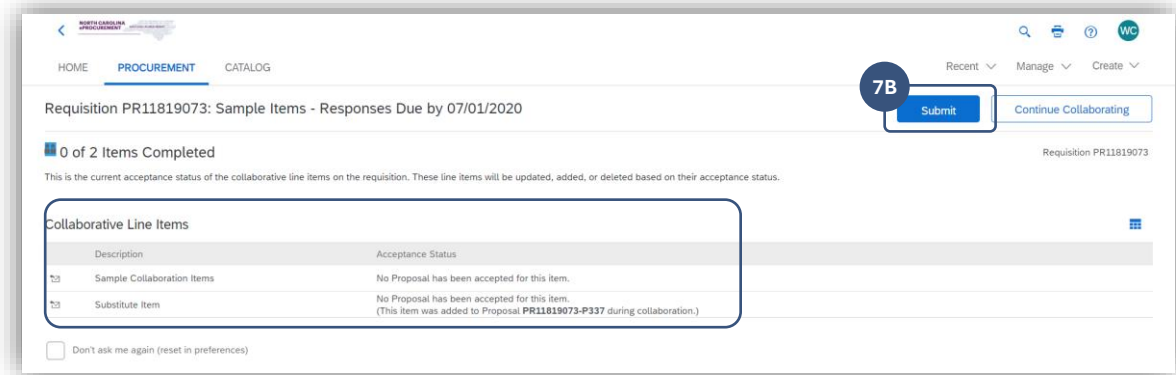
Proposals Hide Details

Name	Contact	Status	Qty	UOM	Price	Total
BOB BARKER COMPANY INC	BOB BARKER COMPANY INC	Proposal Received - Please Respond	200	each	\$28.00000 USD	\$5,600.00000 USD
US Foods	US Foods Columbia Division	Request Sent - Waiting For Response	200	each	\$0.00000 USD	\$0.00000 USD

**B.** To end a Collaboration request before selecting a vendor, select the **End Collaboration** button in the upper left.

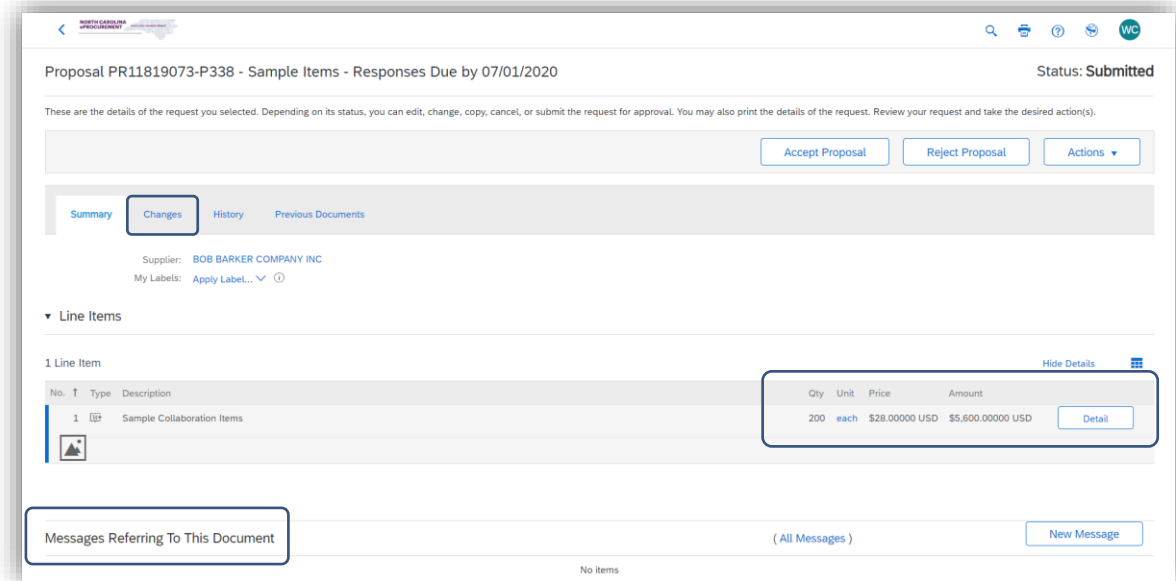
1. The next page shows the Acceptance Status of all collaboration line items on the PR, including any new lines for vendor suggested substitutions. See Section V: Handling Substitutions for more information on substitute items.
2. Clicking **Submit** will delete line items with no accepted vendor proposals. This will end any Collaboration for all line items on the PR.
3. Click the **Continue Collaborating** button to go back to the Collaboration tab and continue evaluating vendor responses.

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C. When a vendor has responded to the Collaboration, the status will update to **Proposal Received – Please Respond** on the Collaboration tab. Click on the status link to go to the proposal details.

1. The Changes tab shows all changes to the Collaboration line item that the vendor made when sending in their request.
2. The History tab will show when the vendor sent their proposal to the buyer.
3. All Messages and Attachments exchanged with the chosen vendor can be found below the line item details for reference before finishing Collaboration.



D. Use the Changes tab to inspect the line item response details. Check to see if the Full Description, Quantity, Part Number, etc. have been altered by the vendor.


1. If any details have been altered without prior notice, contact the vendor to see why the changes were made and work with your purchasing department to see if the substituted item details can be accepted, if needed.

# Collaborative Requisitioning

- E. Click **Accept Proposal** at the top of the page of the best vendor proposal.
- F. Select the **OK** button to accept the vendor proposal for Collaboration for just the chosen line and continue Collaboration on other lines.

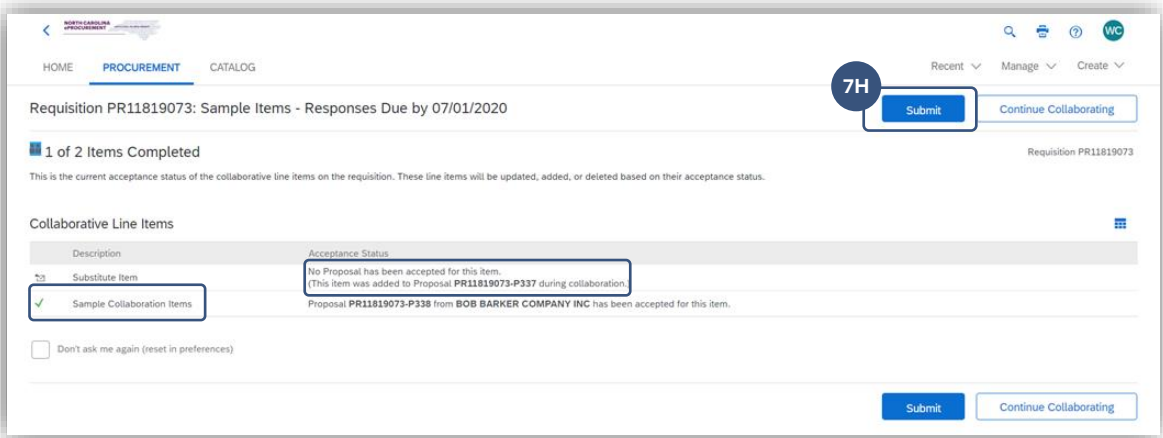
1. The **Finish Collaborating** button is for ending Collaboration immediately after accepting this vendor proposal.

- G. After accepting proposals for all line items as needed, select the **End Collaboration** button on the Collaboration tab.

 After accepting a vendor response for a Collaboration request, the status of other vendor responses will not be altered by the system until Collaboration ends.

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- H. Click **Submit** to end Collaboration for the line item(s) and merge the quoted price for the goods or services onto the PR.
  1. Any lines without accepted vendor proposals, including substitutes, will be deleted from the PR.
  2. Click the **Continue Collaborating** button to go back to the Collaboration tab and continue evaluating vendor responses.
- I. Once the user clicks **Submit** to accept the vendor proposal(s), the PR Collaboration line items will be populated with the vendor chosen and the proposed pricing.



- J. As Collaboration is finished, the status will move to **Collaboration Completed** and the PR is sent to the Approval Flow. Check the Approval Flow on the PR Summary page for further information on the required approvals for the newly submitted PR.

Depending on the Approving rules set up by the requesters entity, the PR may need to be approved by additional groups, sent to the vendor directly for order fulfillment, or be sent the users financial system. For questions about the approval flow rules set up for your entity, please contact your Security Administrator.

