Creating Purchase Requisitions: Expert View

Introduction

This process guide provides instruction on the functional steps to create a Purchase Requisition (PR) in the Expert View of NC eProcurement. A PR is a request to buy goods or services that is created electronically using the Ariba on Demand purchasing system.

Learning **Objectives**

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

- Add catalog line items to a purchase requisition in Expert View.
- Add non-catalog line items to a purchase requisition in Expert View.
- Submit a purchase requisition in Exper View.

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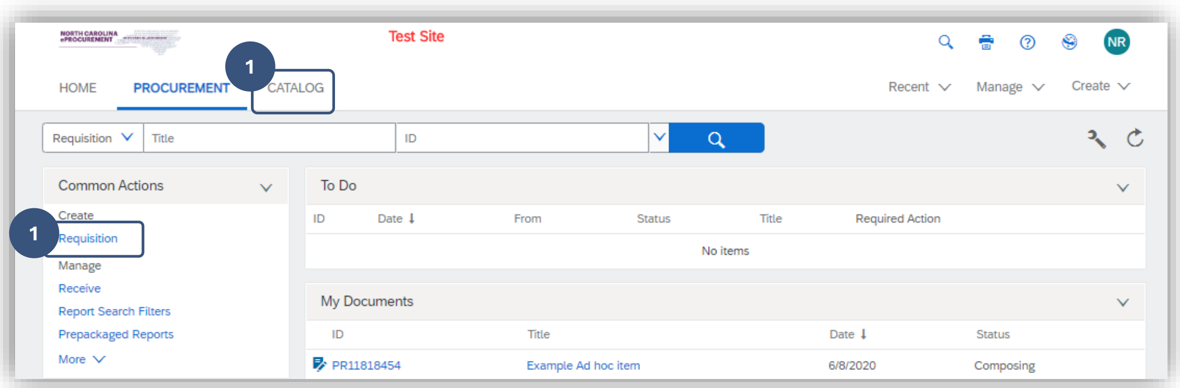
Creating a Purchase Requisition with Catalog Items

1 There are two ways to create a Purchase Requisition (PR) in Expert View. From the **Procurement** tab, the user can click the **Requisition** link at the top of the **Common Actions** portlet, or from the **Catalog** tab, the user can search for and select an item and click **Add to cart**. Both actions will generate a numbered but untitled PR to which the user can add more items, **Check out** those items, and **Submit** the PR for approval.



Adding Catalog Items

2 If an item appears in the NC eProcurement catalogs, it is on a Statewide Term Contract (STC) negotiated on behalf of the State of North Carolinas buyers by the Division of Purchase & Contract (P&C). Users may add catalog items to their PR by utilizing the catalog search functionality. Users can also navigate to Punchout catalogs or request items that are not on STC (Non-Catalog Item). Punchout and Non-Catalog requisitioning processes are covered in subsequent sections.

Whether the user initiated the search by clicking on **Requisition** from the **Procurement** tab, or they navigated directly to the **Catalog** tab, the process of searching the catalogs will act the same within the **Catalog** tab.

Users can search the catalogs using several methods. In addition to being able to browse the catalog by using the **Search Bar**, users can also shop by **Category** or **Supplier**.

A. In the **Search Bar**, enter the desired search criteria and click the magnifying glass or press **Enter**.

- Searches recognize and return results for **Keywords**, **Supplier Part #**, **Manufacturer**, **Statewide Contract ID**, or **Category**.
- The **Search Bar** will suggest results based on whats been entered before the search is complete and has a “fuzzy” nature to it, meaning that the system will attempt to return results that sound like the entered search criteria, not just match the results to the exact text of the search.

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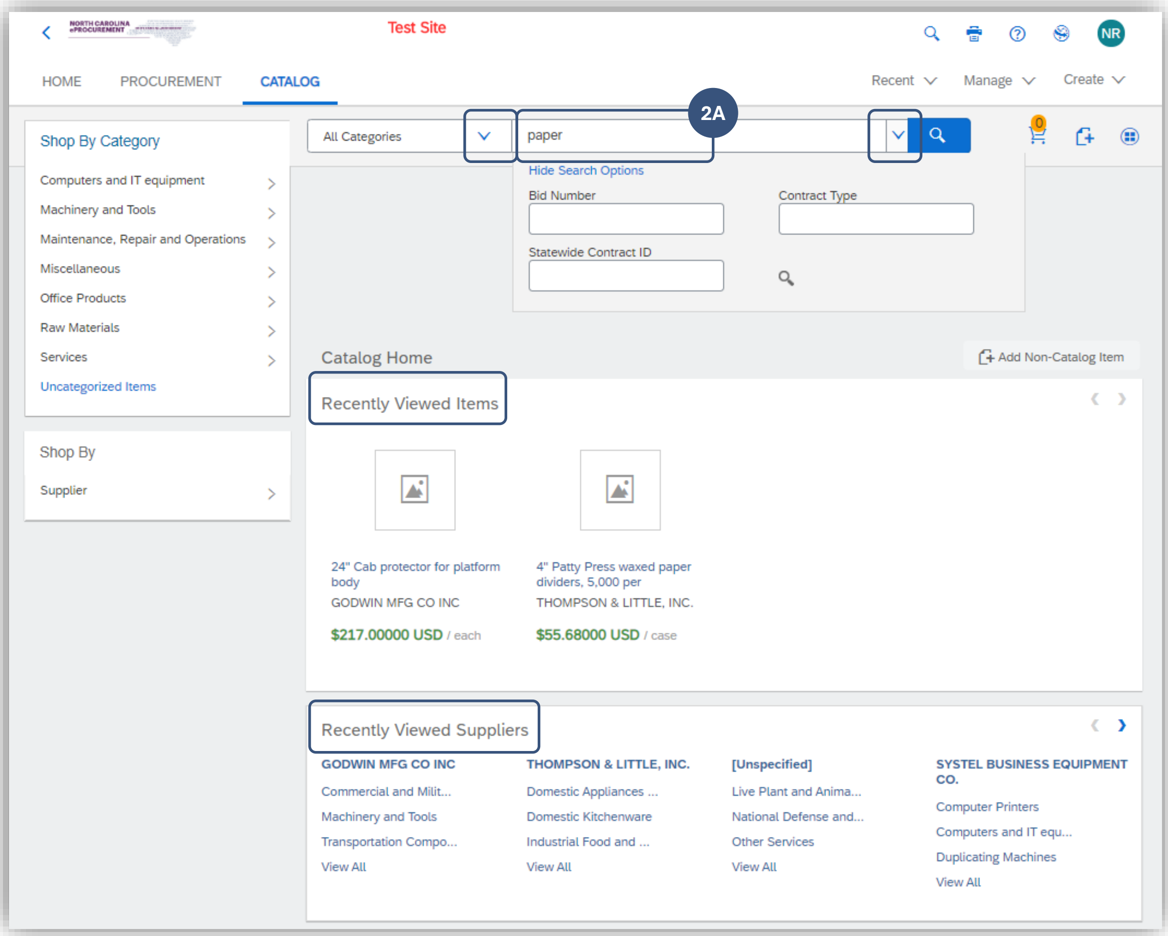
- Below the **Search Bar**, the system will display the items and suppliers the user has most recently viewed.
- Searches can be limited to only certain categories by clicking the **Category** dropdown to the left of the **Search Bar**. This field defaults to **All Categories** which allows the user to search the entire site, but if a specific **Category** is selected in the dropdown, the system will only return results from a limited number of items.
- Users can add additional search options for **Bid Number**, **Contract Type**, or **Statewide Contract ID** beneath the main **Search Bar** by clicking the arrow to the right of the **Search Bar** and clicking on the options theyd like to include. These can be hidden later by clicking **Hide Search Options**.



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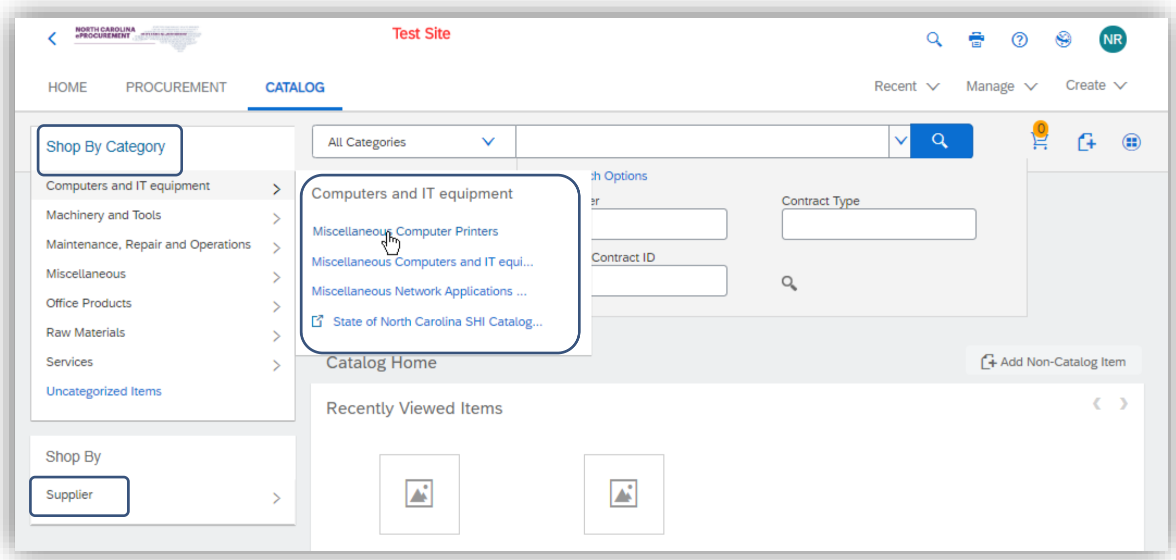

B. After conducting the search, the results page will be displayed. It will provide further options for refining the search and evaluating the results.

C. The **Filter By** panel on the left side of the screen will provide a mini **Search Bar** to further search by additional **Keywords** only within the results that have already returned.

D. Below the **Search Bar** on the **Filter By** panel, the user will be able to refine their search by checking a box next to a system-generated suggestion in one of the following fields: **Keyword**, **Category**, **Supplier**, **Manufacturer**, and **Price**. These options will automatically appear and are dependent on the search results, and the number that displays to the right of the selection indicates how many items will display.

E. The **search path** displays the trail of the current search above the search results. Click any of the links to move back through the trail, or **Catalog Home** to clear the search and start over.

F. The sorting bar above the search results will display the total amount of items returned in the search in the top left. The **View** options will default to **List**, but the user can alternatively select the **Grid** view to display a condensed view of the catalog search results.

G. Sort by allows users to sort the search results in different orders. It will default to **Relevance**, but can be changed via the dropdown to **Price – Ascending**, **Price – Descending**, **Best Selling**, **Name – Ascending**, or **Name – Descending**.

H. The **Viewing** menu defaults to **20 items** per page, but the user can change the amount displayed via the dropdown by selecting **50 items**, or **100 items**.

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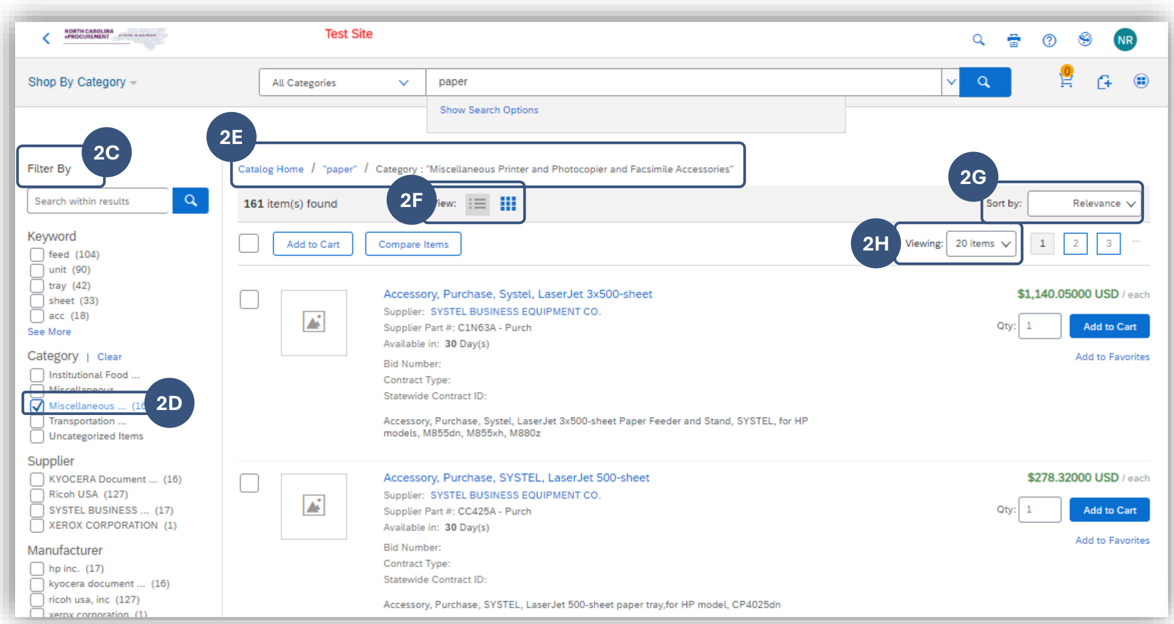
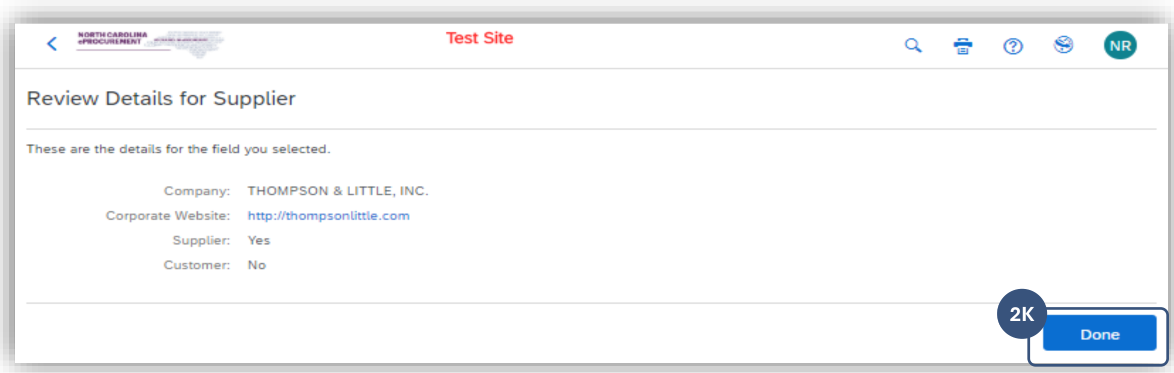


I. Each catalog item on the results page will provide a description of the item, the Supplier, **Supplier Part #**, lead time, **Bid Number**, **Contract Type**, **Statewide Contract ID**, the price of the item, its unit of measure, and a field to adjust the quantity desired.

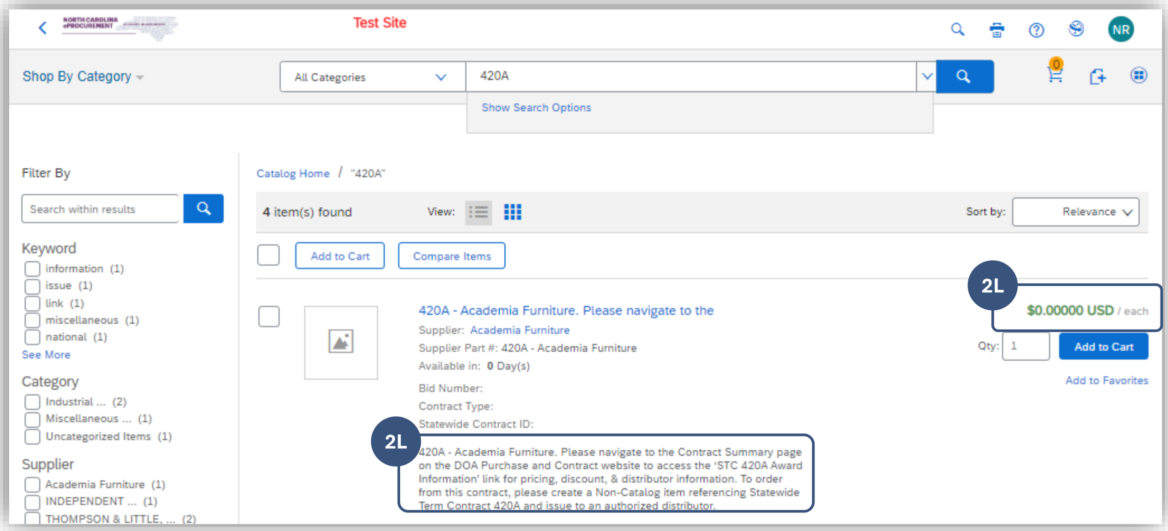
> Suppliers can provide pictures for their catalog items, but not all items will have a picture.

J. If a user clicks on the blue description of the item, a detailed view of the item will display.

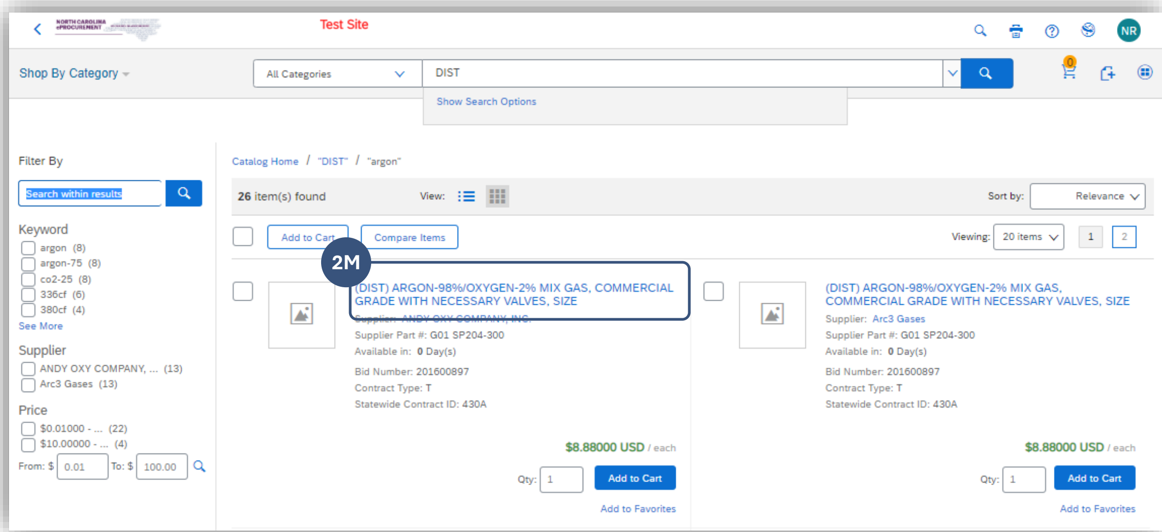
K. To view detailed supplier information, click the blue supplier name link. The **Review Details for Supplier** screen will appear. Click **Done** to return to the search results.



L. Some catalog items are placeholders for additional ordering instructions. Items containing additional ordering instructions will reflect a price of **$0.00000 USD** and will contain the necessary steps in the item description. Users should refer to those instructions when adding this type of item to their PR.



M. Items with **(DIST)** in front of their description indicate that the item is supplied by a distributor, not necessarily the STC vendor. Multiple seemingly identical catalog items will appear for the same product, but they will have different suppliers listed. The user may choose any of the items as they are the same, but they will be delivered from a different location. In essence, the user will be choosing based on the **Supplier** listed, perhaps taking proximity to the distributors locations into account.



N. Enumerations are STC items that have specific attributes associated with them and that require the user to select a preferred option before the item is added to the Purchase Requisition (e.g., size, color, delivery options). When an Enumeration item is returned in a search, the **Add to cart** button will have a down-arrow in the box next to the text. When the user clicks the button, a dropdown box will display the options for the user to choose from another dropdown menu. The user will need to select the preferred option before clicking **Add**.

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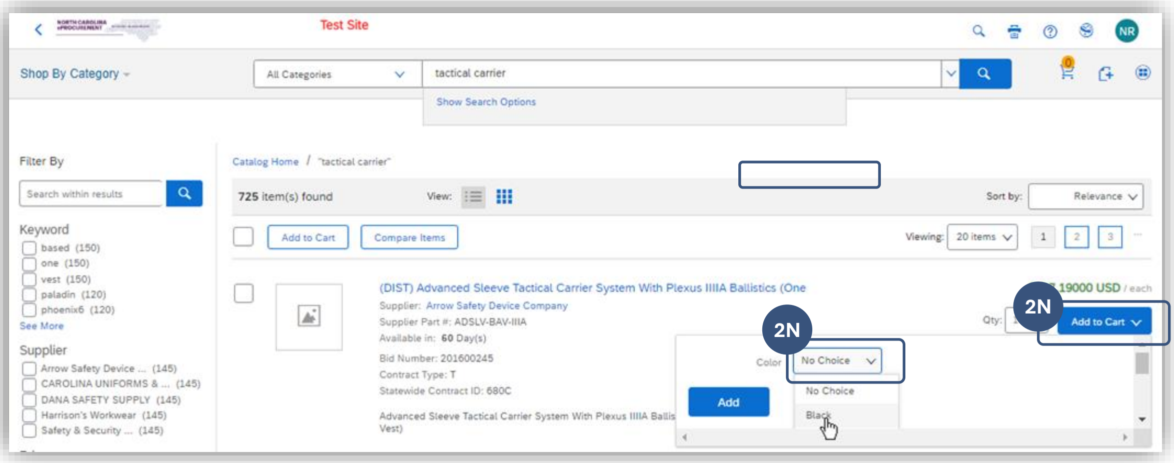
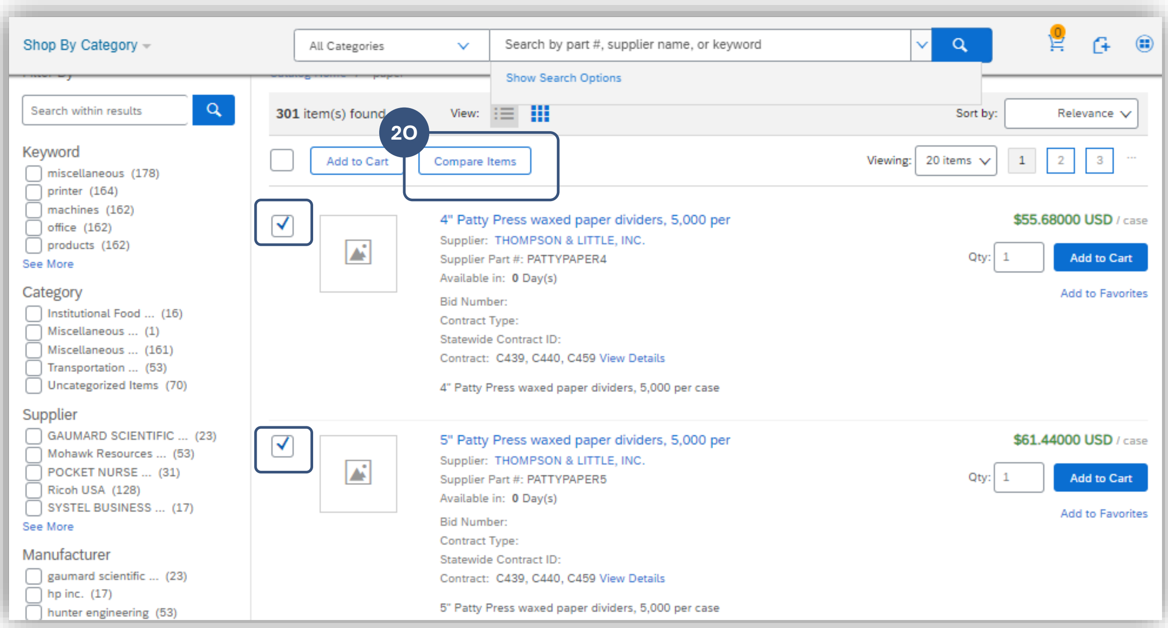


O. Two or three items can be compared side by side to quickly review the attributes of those items. Check the boxes next to the items to be compared and click the **Compare Items** button.



P. The **Compare** page will be displayed. Once the information has been reviewed, click **Continue Shopping** to return to the search results or add the desired item directly to the cart from this page after adjusting the quantity.

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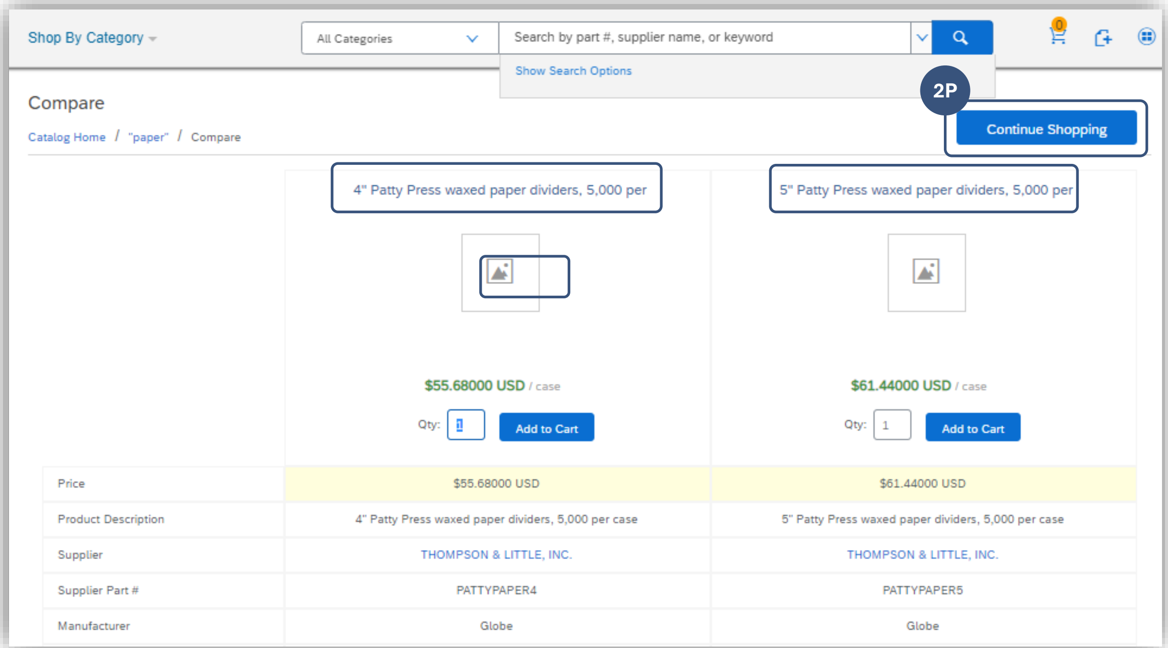
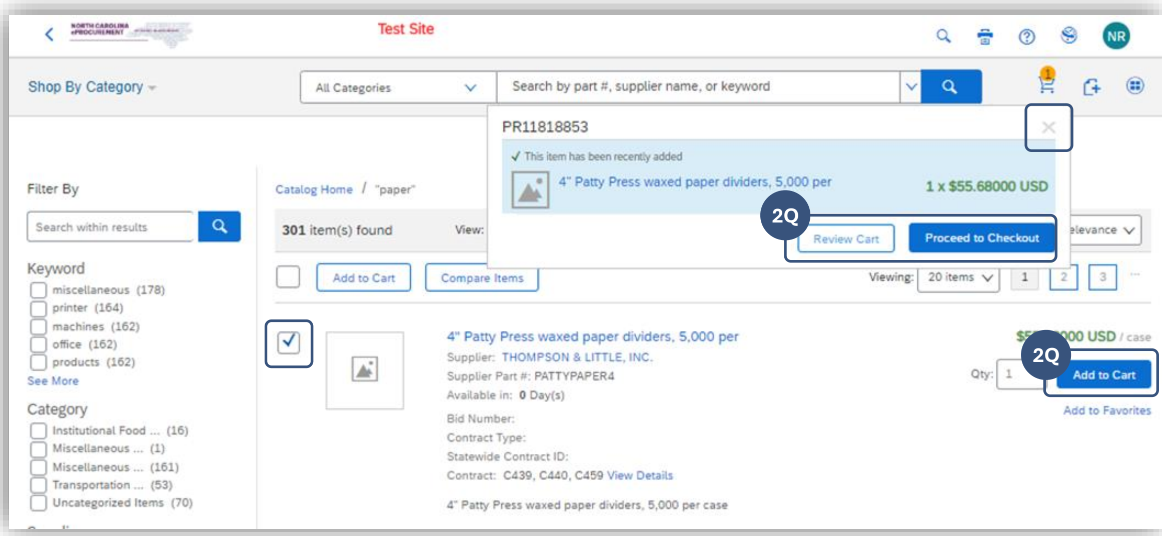
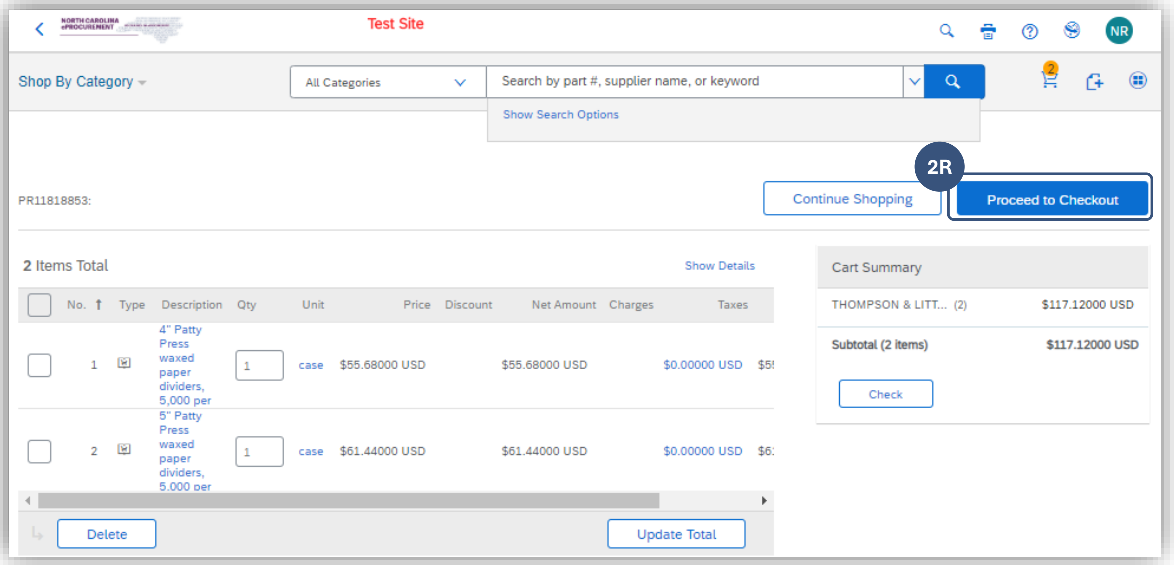


Q. If a user finds the desired item and adjusts the quantity needed, they can click the blue **Add to Cart** button on the right, or they can check the box to the left of the item and click the **Add to cart** button at the top of the results. A yellow bubble indicating the number of items they have in their cart will display above the shopping cart icon in the upper right. A drop-down box will give the user an opportunity to **Proceed to Checkout** or **Review Cart**. They can also click the **X** in the top right of the drop-down box to continue shopping for another item on that particular STC.

Multiple catalog items can be added to the same PR, but they have to be from the same STC. The system will prevent items from more than one STC to be included on the same PR, and the user will be notified with an error message. For this reason, a Non-Catalog item cannot be added to a PR with a catalog item already on it.



R. If the user clicks **Review Cart**, a more detailed view of the shopping cart for that PR will display. The user can delete any unwanted items by checking the box next to those they no longer want and clicking the **Delete** button. They can click **Continue Shopping** to leave the items in the cart and return to catalogs, or they can click the blue **Proceed to Checkout** button if they are ready to purchase the items in the cart. They will be directed to the **Summary** page where they can finalize the details of the PR.



Adding Catalog Item Favorites

3 Users may add specific Statewide Term Contract (STC) items to a favorites list for quick reference. Catalog items saved as favorites are updated as the catalog item is updated (e.g., price, description). Favorite items can be organized within folders or they can be unclassified.

Favorite Lists from Guided Buying do not carry over into Expert View and vice versa.

A. To mark an item as a favorite, execute a catalog search for the desired item.

B. Click the **Add to Favorites** link next to the item. A pink star next to the text **My Favorite Items** will display where the **Add to Favorites** link just was to notify the user this item has been favorited.

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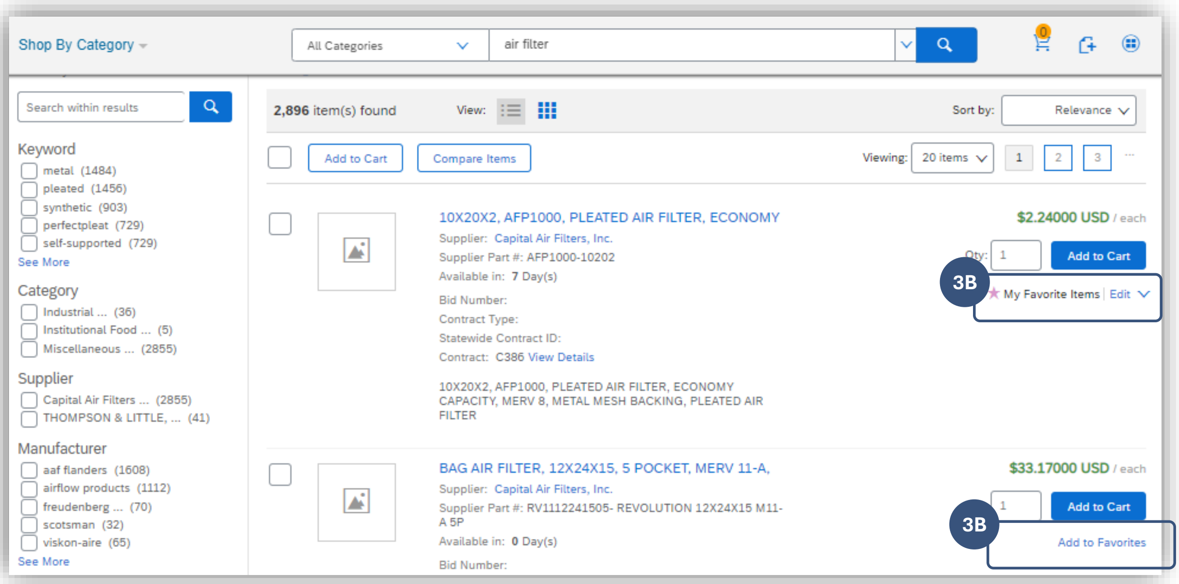
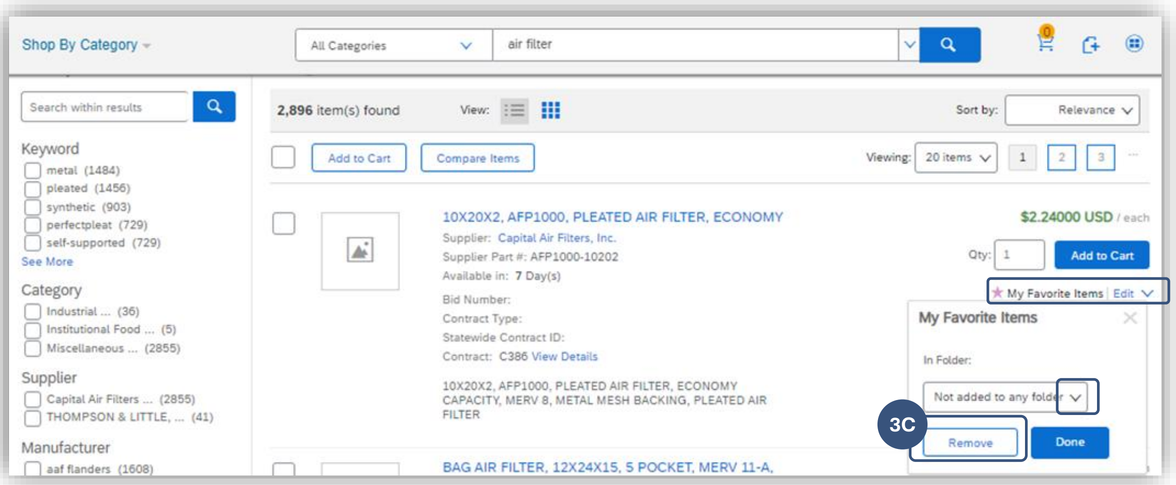
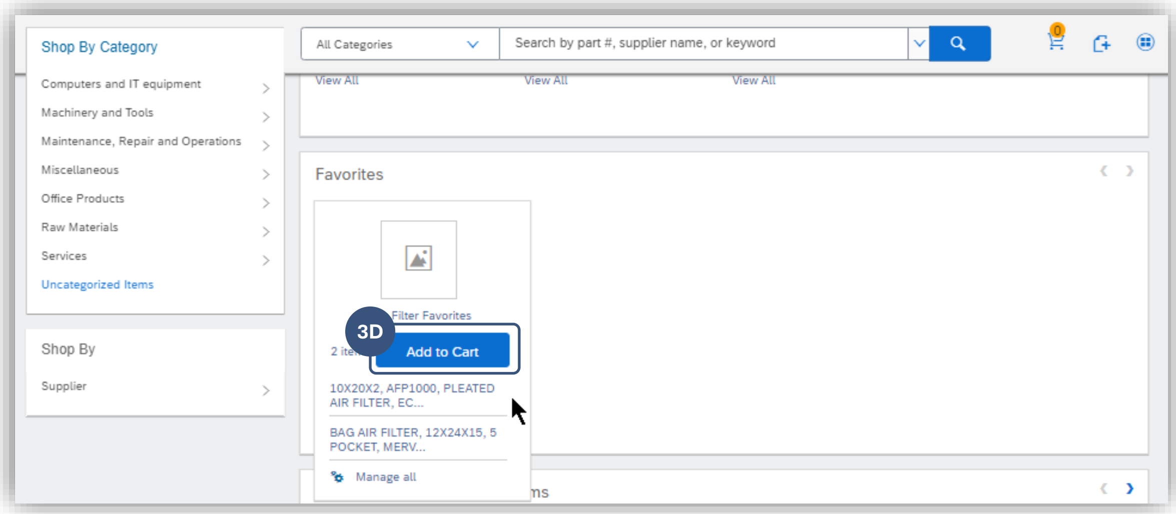


C. When an item has been marked as a favorite, the user can click the **Edit** dropdown next to the favorite indicator to further organize the item. They can click the ensuing drop-down to add the item to an existing **Folder**, or create a new **Folder** to add that item to. If they no longer wish to mark that item as a favorite, they can click the **Remove** button.



D. Once an item has been marked as a favorite, it will display in the **Favorites** section on the **Catalog Home** page below the **Recently Viewed Suppliers** section, either within a **Folder** or just as itself if it was not organized within one. Hovering over the item or **Folder** will display an **Add to Cart** button. If there are multiple items in a **Folder**, clicking this button will add each of the items to the cart. To add just one item, click on the brief description of that item below **Add to Cart**, and do so on the subsequent **Detailed View** page. Click **Manage all** to delete items from that **Folder**, or to rename or delete the entire **Folder**.

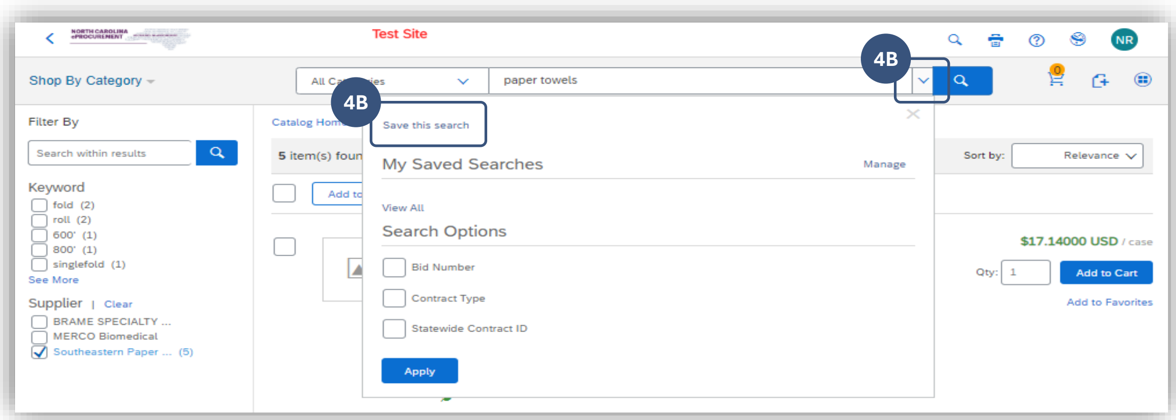


Saving Catalog Searches

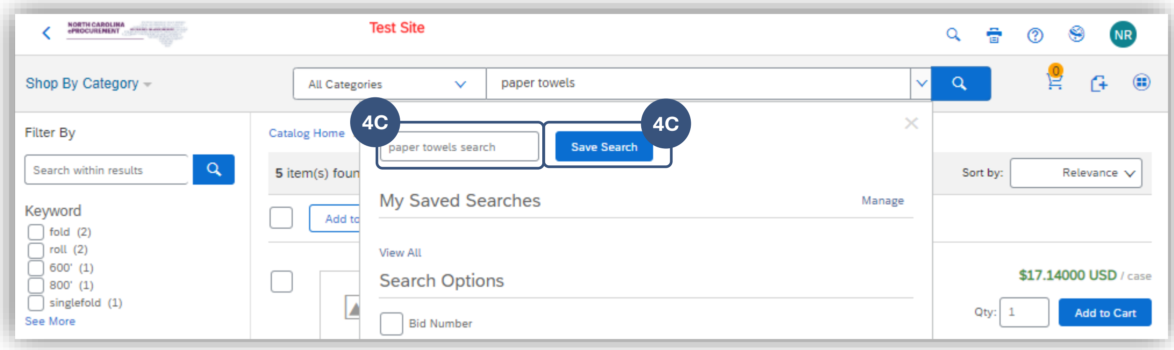
4 Users may save frequently used catalog searches for future reference. This can be helpful for users that add the same type of line items to a Purchase Requisition (PR) on a regular basis.

A. From the **Catalog Home** page, users should run the catalog search using the same parameters as the search that they would like to be saved. The results will be displayed based on the requirements that the user has entered.

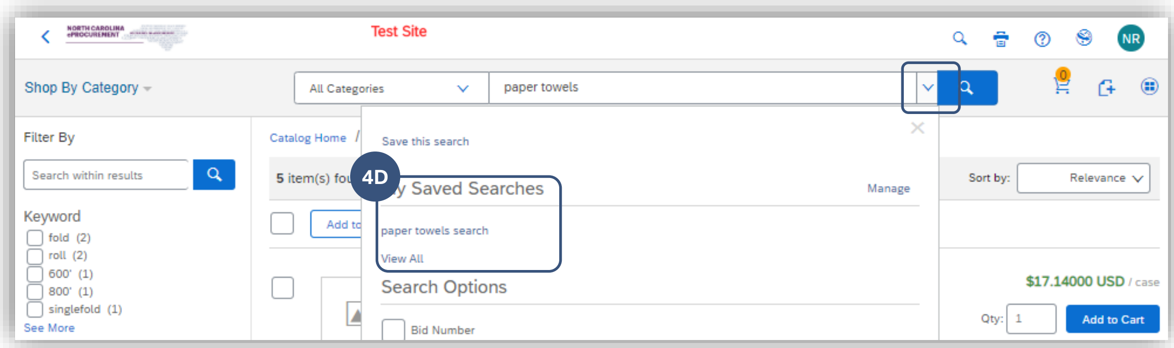
B. Click the arrow to the right of the **Search Bar** and click **Save this search** from the ensuing dropdown.



C. A suggested search name will populate in a free-text field next to a blue **Save Search** button. The user can accept the suggested name or rename it with another name of their choice, then click **Save Search**. A message will display notifying the user that the search has been saved



D. To access their saved searches, users can click the arrow to the right of the **Search Bar**, and the dropdown will display a section called **My Saved Searches**. Users can click on the searches listed to see the items in that search, or they can click **View all** of **Manage** if there are too many saved searches to display in the dropdown. The subsequent screen will allow for further editing and searching.



Adding Punchout Catalog Items in Expert View

5 Some State of North Carolina Statewide Term Contract (STC) suppliers have created punchout websites containing negotiated term contract items. These punchout sites are accessible through the NC eProcurement term contract catalogs. A punchout site is a website created and maintained by the supplier specifically for the State of North Carolina. Users do not need to enter a new user ID or password to enter the suppliers punchout site. The suppliers website will automatically recognize users from NC eProcurement, and after the buyer has selected items on the suppliers website, the items are automatically transferred into NC eProcurement as line items on the Purchase Requisition (PR). Once completed, the purchase order will be delivered to the supplier through NC eProcurement.

A. After clicking the **Requisition** link on the **Procurement** tab, start a search on the **Catalog** tab by entering text into the **Search Bar**, or by clicking on a **Category** or **Supplier**.

The **Search Bar** will return results by **Category** (ex: Office Supplies), **Supplier** (ex: FSI), or **Statewide Contract ID** (ex: 615A) that may lead the user to a punchout catalog. Alternatively, if the user enters the keyword **Punchout** in the **Search Bar**, the only results returned will be links to punchout catalog sites.

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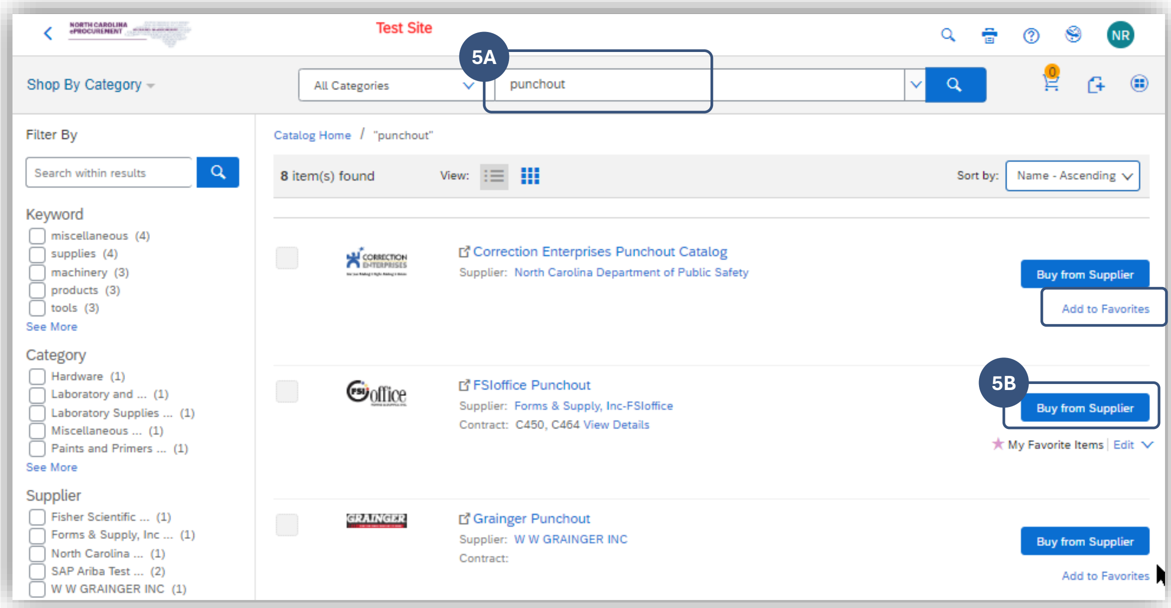
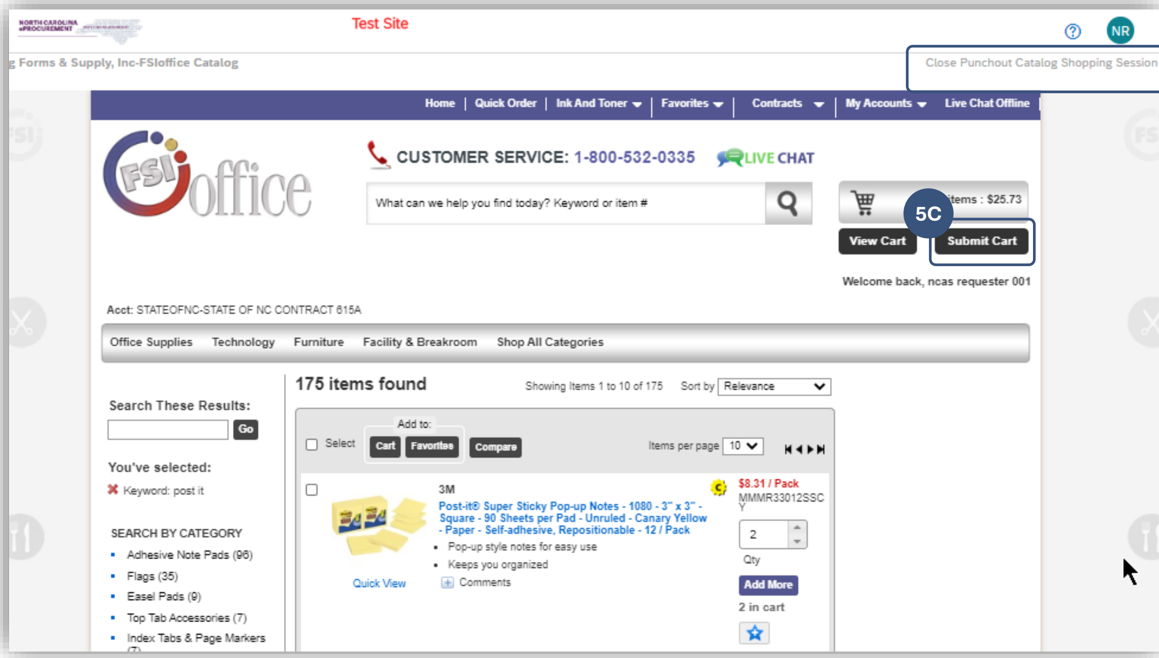
B. Punchout catalog results will not show individual items with prices like standard catalog items. A catalog item with the suppliers name, logo, and a blue **Buy from Supplier** button will display for each punchout catalog link.

Users can add a punchout catalog link as a favorite by clicking **Add to Favorites** just like with standard catalog items

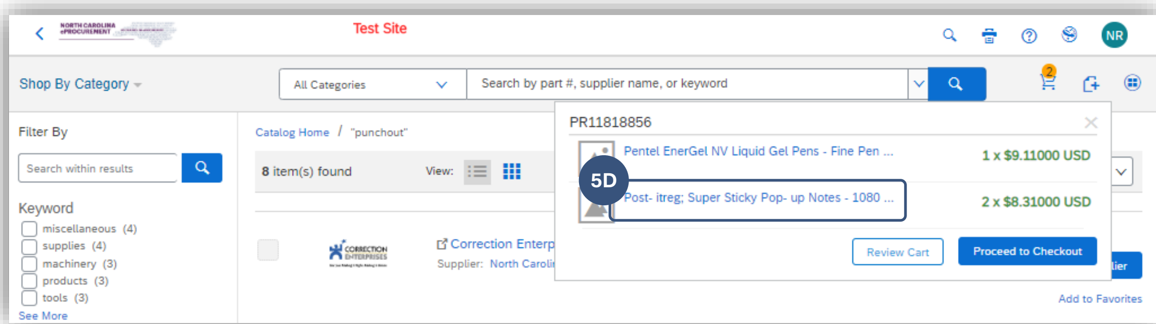


C. The user will be directed to the suppliers punchout catalog site. The page will still be branded with **NC eProcurement** at the top, but the content of the site will be maintained by the supplier. Since the individual supplier creates their own punchout site, each site may differ in appearance and navigation; however, each site will have the same basic logic. When shopping on a punchout site, users will add the desired items to the shopping cart on that site, then click **Submit** to automatically send the selected items back to their **NC eProcurement** shopping cart.

If a buyer decides to end a punchout shopping session before any items are selected, they may return to the PR by clicking on **Close Punchout Catalog Shopping Session**.



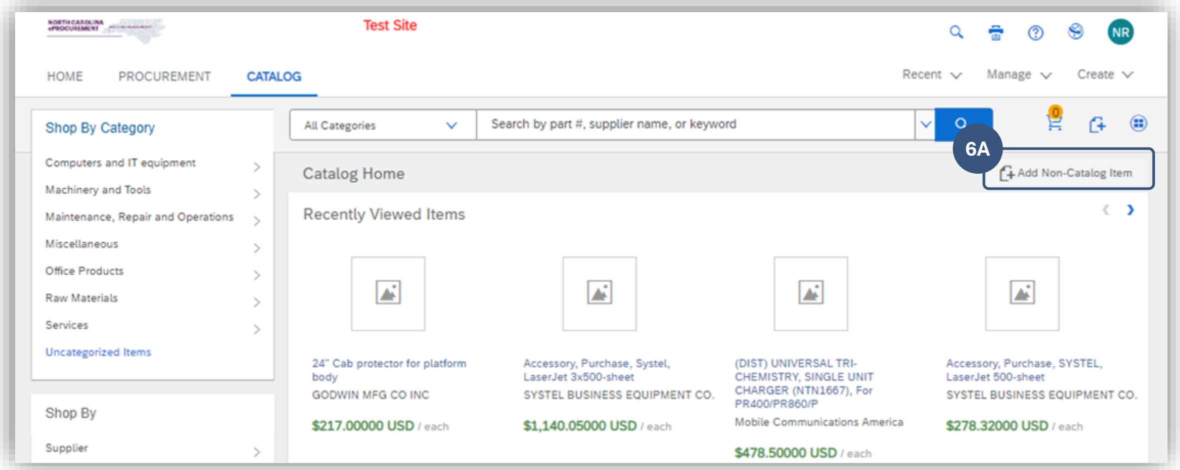
D. Once the punchout item(s) have been sent back to NC eProcurement, if there is a need to edit the quantity of the item or to add additional punchout items from that catalog, the user will have to make those edits back on the suppliers punchout catalog site and re-submit their punchout cart. To access the punchout site again for those specific items, click on the **Description** of any of the line items from the **Shopping Cart** if the items have not yet reached the **Checkout** stage, or when editing the PR on the **Summary** page if the user has already clicked **Proceed to Checkout**.



Adding Non-Catalog Items in Expert View

6 Users may manually add **Non-Catalog** items to a Purchase Requisition (PR) when a catalog item is not available or when they are ordering from a vendor that is not on a Statewide Term Contract (STC).

A. After clicking the **Requisition** link on the **Procurement** tab, or by starting directly on the **Catalog** tab, click on the **Add Non-Catalog Item** link or click on the Non-Catalog icon to the right of the shopping cart icon.



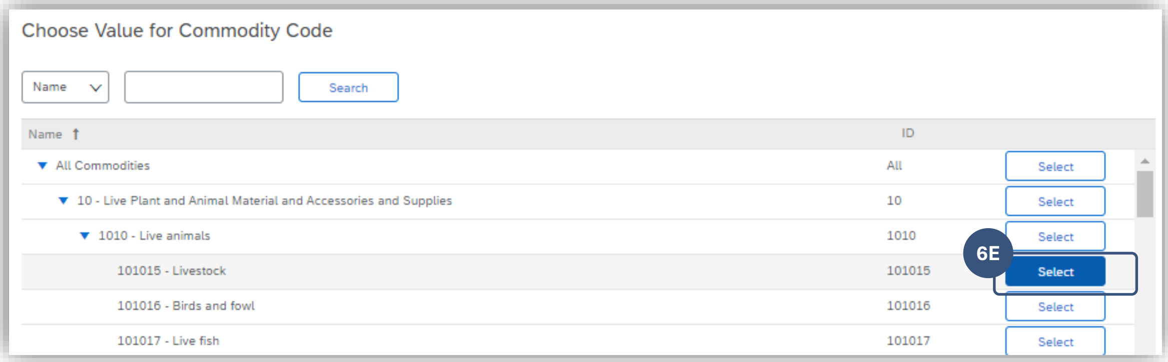
B. The **Create Non-Catalog Item** page will display for the user to enter non-catalog information.

C. 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).

D. Terms of Payment: This field initially defaults to **(no value)** and can only be edited by a user with the **Purchasing Agent** role. Once a **Supplier** is selected below, it will change to **Net 30 Days**.

E. 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 more** to search for the appropriate code. Users may search by commodity code or keyword.

- It is important to select the appropriate **Commodity Code** as the State of North Carolina uses this for reporting purposes. TTesthe codes listed are part of the United Nations Standard Products and Services (UNSPSC) commodity code structure. Codes that begin with a **7**, **8**, or **9** describe service type codes. These codes should not be used when purchasing goods.
- It is required that users enter a **Commodity Code** out to the sixth digit. Codes are organized in layers of twos, so the user must choose from the third layer. Adding a code from the first or second layer will not be prohibited on this page, but the user will receive an error when they attempt to Submit the PR if the selection does not have six digits.
- For further instruction on selecting the correct category, please refer to the **Selecting a UNSPSC Commodity Code** job aid.



F. Quantity: Enter the appropriate Quantity.

G. Unit of Measure: Locate the appropriate Unit of Measure in the drop-down menu if the default value of **each** is not correct. If the desired Unit of Measure is not listed in the drop-down menu, choose Search more to find the appropriate value.

H. Price: Enter the Price of the item.

It is advised that users ignore the **Additional Pricing Details** link below this field, as it provides advanced options that are rarely needed for a basic purchase.

I. Amount: This field is automatically calculated based on the information entered above.

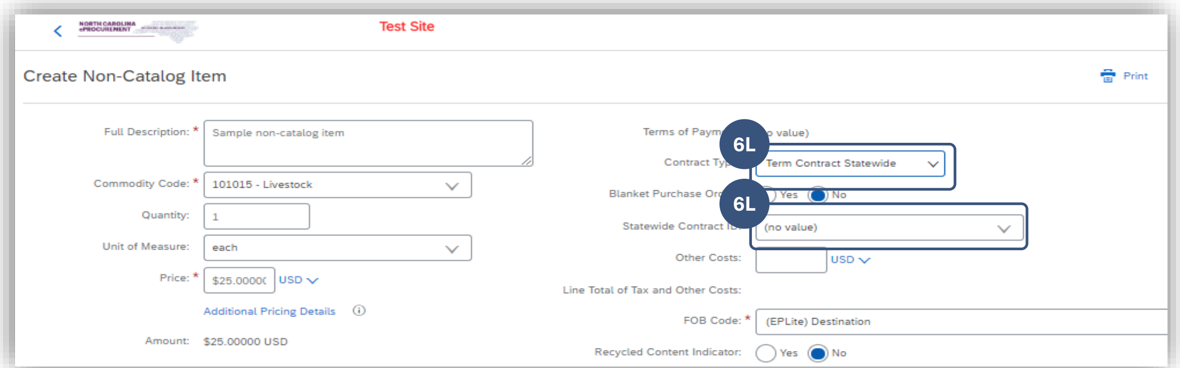
J. Tax Amount: This field will calculate automatically later in the process based on the selected tax rate (which will display on a subsequent screen). At this point in the process, nothing will display here.

K. Update Amount: Click this button to recalculate **Amount** when changes are made to the item being added.

L. Contract Type: Select the appropriate contract type if applicable. The field will default to **No Choice**, which is fine if the item is not already on a Statewide or Agency contract. This will likely be the case for most non-catalog items, but there may be instances in which a user needs to enter a contract item that is not available via catalogs as a non-catalog item, and selecting the correct **Contract Type** will be important. The options available in the drop-down menu are as follows:

1. **Term Contract Statewide:** A contract for goods or services negotiated by P&C and available to all State purchasers. These items can often be found via the catalogs.
2. **Term Contract Agency Specific:** A contract for goods or services negotiated by a specific Agency to cover a specific period of time. These items are not available via the catalogs.
3. **Term Contract IT Convenience:** A contract for goods or services negotiated by DIT and available to all State purchasers. These items can often be found via the catalogs.
4. **No Contract:** The item is not associated with any contract. This is the same as **No Choice**, so it is not necessary to select this if the user leaves **No Choice** as the default.
5. **Agency Contract:** A contract for goods or services negotiated by a specific Agency for a spot-buy (nonrecurring) purchase. These items are not available via the catalogs.

Selecting **Term Contract Statewide** or **Term Contract IT Convenience** from the drop-down menu will add an additional **Statewide Contract ID** field to the page. Users may choose the drop-down menu in this new field and select **Search more** to search for and select the Statewide Contract from which the item is being purchased. Selecting **Term Contract Agency Specific** or **Agency Contract** from the drop-down menu will also add an additional **Agency Contract ID** field to the page, but in this case, the field is a free text field where the user can key the appropriate information. Entering the correct contract information allows the State of North Carolina to accurately track and report against contract purchases.



M. Blanket Purchase Order?: Choose whether the purchase is a Blanket order or a Non-Blanket order. This will default to **No** for Non-Blanket, but the selection can be switched to **Yes** if necessary.

N. Other Costs: Users can enter in a dollar amount to be charged as **Other Costs**. It is advised that this field be used with caution, as use cases for this field are not common and tax is not applied on anything added here. This field should NOT be used for including tax or shipping charges from a vendor. Shipping charges on non-catalog items should continue to be added as an additional service line item.

O. Line Total of Tax and Other Costs: This field will calculate automatically later in the process. At this point in the process, nothing will display here.

P. FOB Code: This field defaults to **(EPLITE) Destination** for all orders.

Q. Recycled Content Indicator: Select the appropriate radio button to reflect whether or not the item contains recycled products. This field will default to **No**.

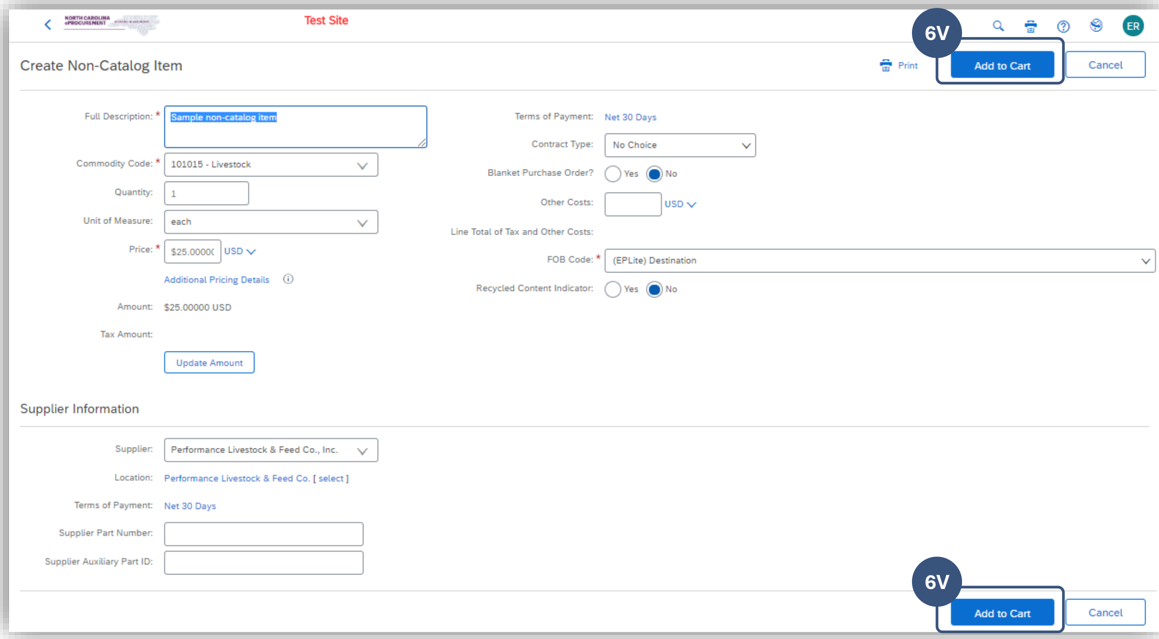
R. Supplier: Locate the supplier in the drop-down menu. If the supplier is not listed in the drop-down menu, choose **Search more** to search for the appropriate supplier. Suppliers can be sorted or searched by **Supplier Name**, **Supplier ID**, or **Hub Status**.

S. Location: Click on **Select** if a different location for the supplier is preferred than the defaulted location once a supplier is selected.

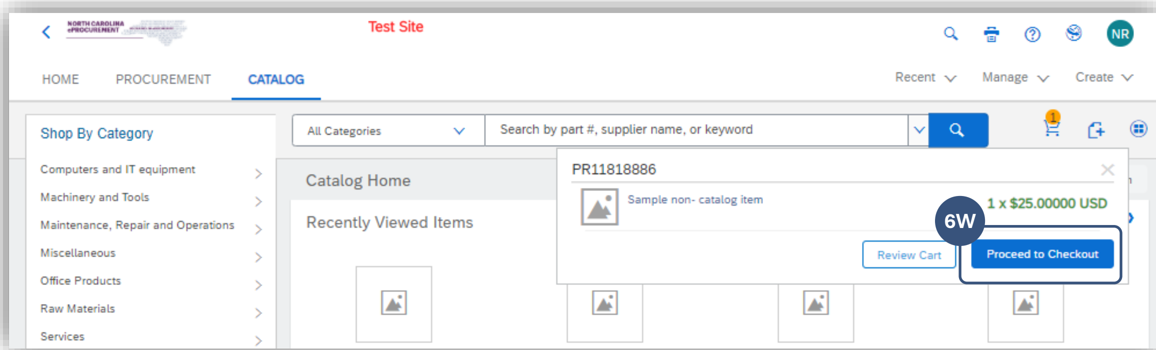
T. Supplier Part Number: Enter the Supplier Part Number (if known). This will assist the vendor in shipping the correct item.

U. Supplier Auxiliary Part Number: Enter the Supplier Auxiliary Part Number (if known). This will additionally assist the vendor in shipping the correct item.

V. When all required fields are complete, the user can click the **Add to cart** button at the top or bottom of the screen. If a field is incorrect or incomplete, it will be outlined in red and accompanied by an error message until its corrected.



W. The user will be returned to the **Catalog** tab, and yellow bubble indicating the number of items they have in their cart will display above the shopping cart icon in the upper right. A drop-down box will give the user an opportunity to **Proceed to Checkout** or **Review Cart**. They can also click the **X** in the top right of the drop-down box to continue shopping and adding another non-catalog item by clicking either of the two initiators in the upper right.



Selecting Unit of Measure for Non-Catalog Items in Expert View

7

The guidelines in this section are NOT required for EPLite users like they are for State Agency users. However, some EPLite entities choose to follow these guidelines and this has been included for them. If an EPLite entity uses the **Unit of Measure** of **Each** for **Blanket** or **Service** line items, that is okay. When entering a **Non-Catalog item**, users must follow the below **Unit of Measure** guidelines that differ based on whether the item is a **Blanket** or a **Non-Blanket** item, and whether it is classified as a **Good** or a **Service**.

	Unit of Measure		
Line Item Classification	**Dollar**	**Hour**	**All Others**
Non-Blanket/Good	NO	NO	YES
Blanket/Good	YES	NO	NO
Non-Blanket/Service	YES	NO	NO
Blanket/Service	NO	YES	NO

Non-Blanket Good

Set the **Quantity** to the total number of units to order.

Set the **Unit of Measure** to anything **except** Dollar or Hour (example: Each).

Set the **Price** to the price of the individual unit.

Blanket Good

Set the **Quantity** to the total dollar amount of the order.

Set the **Unit of Measure** to **Dollar**.

Set the **Price** of the item to **$1.00**.

Mark the blanket purchase indicator to **Yes**.

Non-Blanket Service

Set the **Quantity** to the total dollar amount of the service.

Set the **Unit of Measure** to **Dollar**.

Set the **Price** of the item to **$1.00**.

Blanket Service

Set the **Quantity** to the total number of hours to hire.

Set the **Unit of Measure** to **Hour**.

Set the **Price** to the price per hour.

Mark the **Blanket Purchase** indicator to **Yes**.

Summary Page

8 The **Summary** page allows the user to enter a title as well as shipping, comment, and attachment information. It also allows the user to review the Purchase Requisition (PR) for accuracy. The approval flow for the PR can be viewed on the **Summary** page as well.

A. Once on the **Summary** page, the PR number will display in the top left of the screen, and the user is required to enter a **Title.** The title should be descriptive of the items being purchased and can be used to make the PR easily identifiable.

B. **Entity** defaults to the users entity and cant be changed.

C. The **On Behalf Of** field will default to the requesters name. To create a PR on behalf of another user, use the **On Behalf Of** drop-down menu and select that users name. If the user does not appear in the drop-down menu, select **Search more** and search for the user in the pop-up window that appears.

D. The **Suppress Order** box defaults to unchecked meaning that the purchase order, when created, will NOT BE SUPPRESSED and **will be sent** to the supplier. If the user adds a check to the box, the supplier will **not** receive a copy of the purchase order.

E. The **Buying Entity** field will default to the buying entity that is selected in the users profile. It can be updated using the **Buying Entity** drop-down menu. If the desired buying entity does not appear in the drop-down menu, select **Search more** and search for the desired selection.

F. The **FOB Code** (Freight on Board) reflects how freight charges for the order are paid. This value defaults to **(EPLite) Destination.** Users may select a different option that better meets the agency purchasing policies by using the drop-down menu.

G. **GRAND TOTAL AMOUNT INCLUDING TAX AND OTHER COSTS:** This field will calculate automatically later in the process to be included on the Purchase Order. At this point in the process, nothing will display here.

H. Click **Apply Label...** to add a label to the PR. In the drop-down, the user can select their default **Archive Items,** or create a **New Label.**

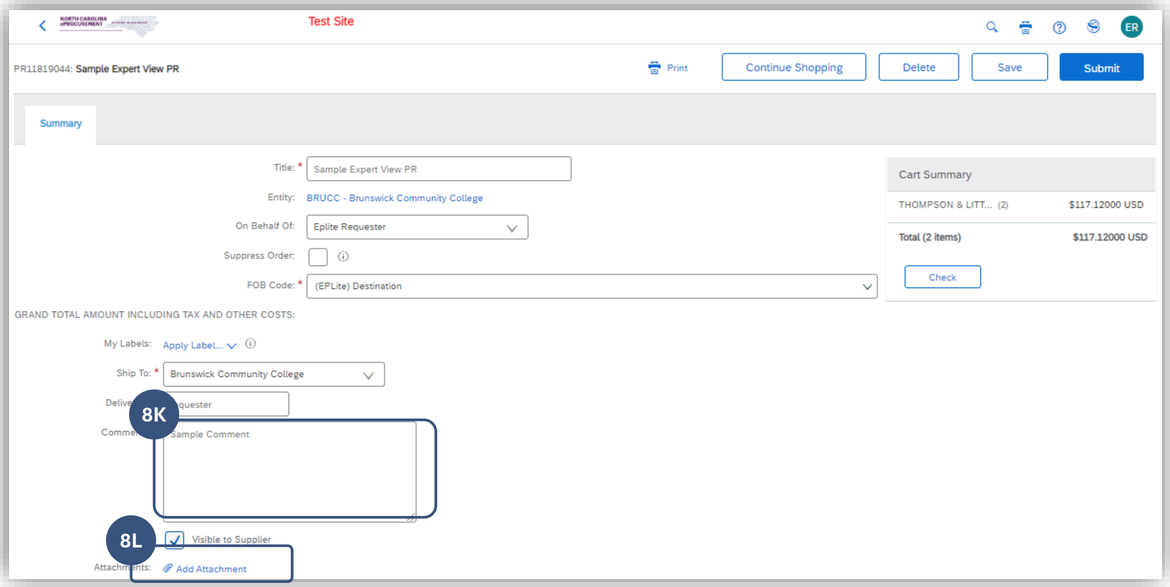
I. The **Ship To** field automatically defaults to the ship to location set up in the users profile. Users may choose a different option by selecting **Search more** from the drop-down menu.

> The **Ship To** drop-down menu contains the ship-to addresses that have been entered by an administrator. These addresses are agency specific.

J. The **Deliver To** field indicates the recipient of the order. This free-text field can be populated with any value, most commonly with the requesters name. This field can be defaulted in the users profile so that it is automatically filled.

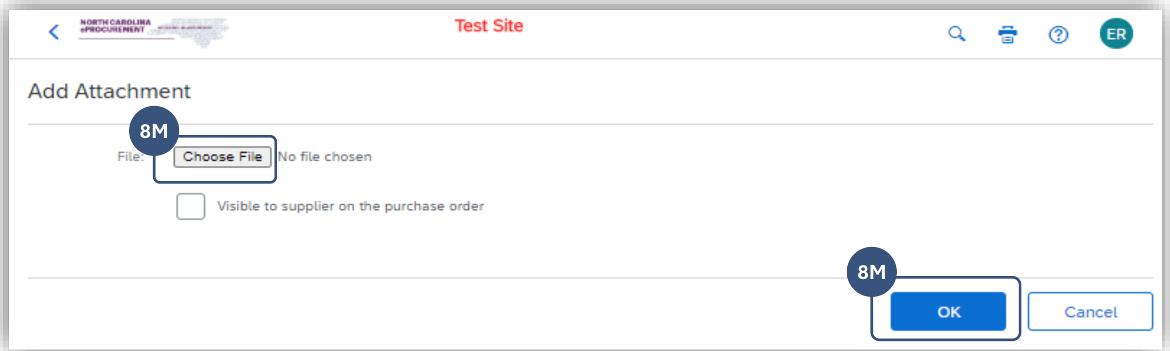
K. Comments may be added for the entire PR using the **Comments** field. The requester may add only one comment on the header level of the PR. If more comments are needed, they may be added after the PR has been submitted. Click the **Visible to Supplier** box if it is desired that the comment be shared with the vendor.

L. Attachments may be added to the PR at the header level by clicking the **Add Attachment** link.

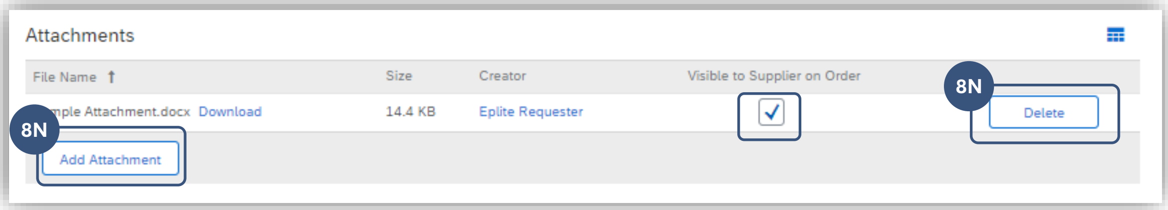


M. The **Add Attachment** page is displayed after the **Add Attachment** link has been clicked at the header level on the **Summary** page. Click the **Choose File** button to locate and select an attachment, then click **OK** once the attachment is selected to populate the **File** field.

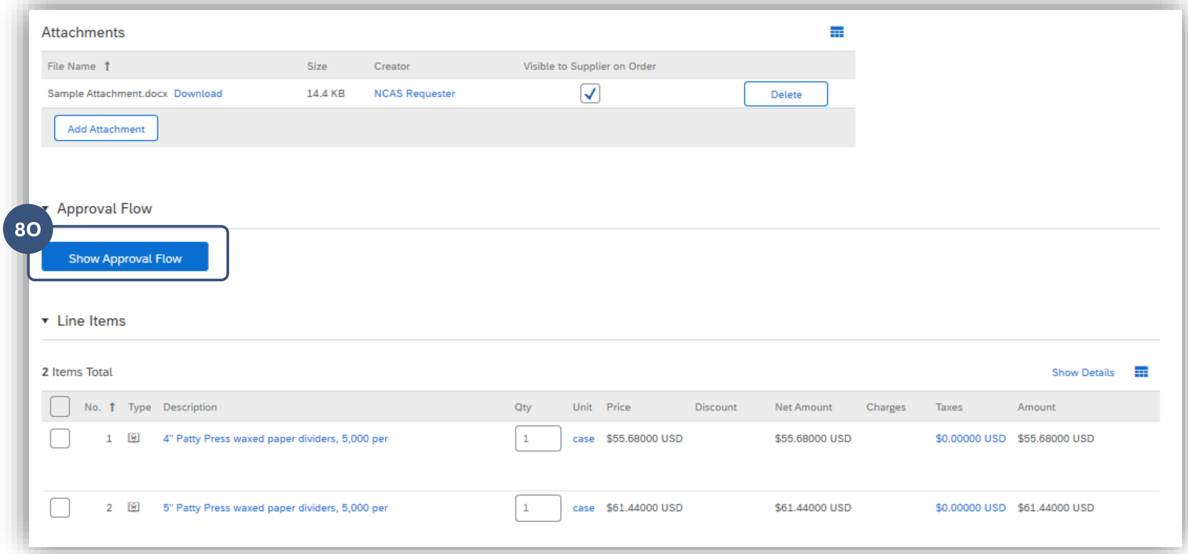
- The following file types are acceptable as attachments: .bmp, .csv, .doc, .docx, .dotx, .gif, .htm, .html, .jpeg, .jpg, .pdf, .png, .potx, .ppsx, .ppt, .pptx, .ps, .rtf, .sldx, .txt, .xls, .xlsx, .xml, and .zip
- The maximum combined file size limit for attachments is 10MB.



N. Once an attachment has been added to a PR, the user can add more attachments by clicking the **Add Attachment** button below the newly visible Attachments section. Users may also change an existing attachments visibility to the supplier by checking or unchecking the **Visible to Supplier** checkbox. Finally, users may delete unwanted attachments by clicking the corresponding **Delete** button.



O. The system generated approval flow can be reviewed by clicking the **Show Approval Flow** button in the **Approval Flow** section below **Attachments** and above the **Line Items** section. If the PR is missing required information (i.e., the Accounting Information that must be completed in the **Line Items** section below, the approval flow will not be displayed).

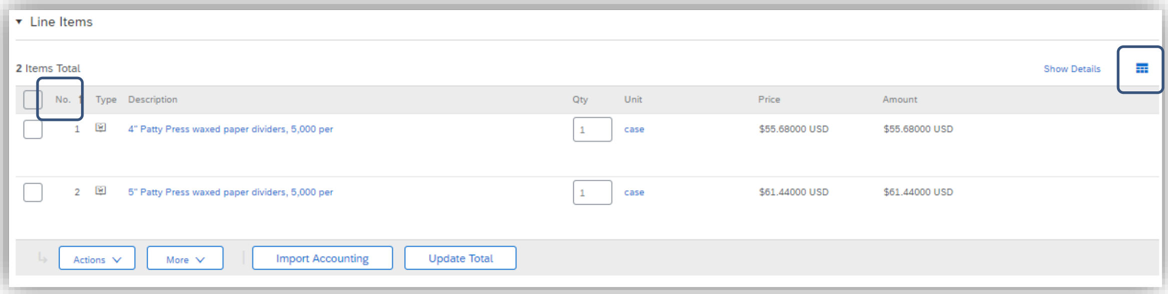


P. The **Line Items** section is at the bottom of the **Summary Page,** and this is where the user can finalize all required details for the PR, most importantly, the financial information.

Q. By default, line items will be displayed in ascending **No.** order on the left, but the user can rearrange the order in which they appear by clicking next to any of the other header fields: **Type, Description, Qty, Unit, Price,** or **Amount.**

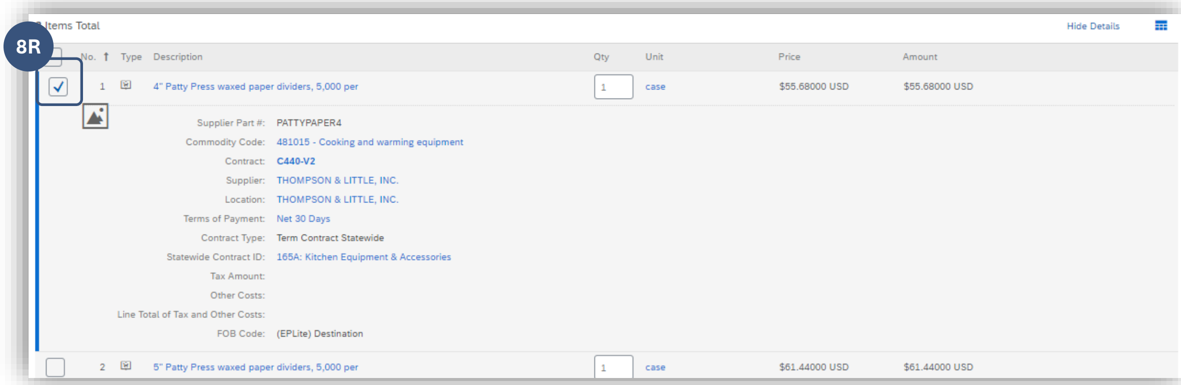
Users can add additional fields to this view by clicking the **Table Options Menu** icon in the top-right. A dropdown menu will appear showing checkmarks next to the fields that currently display, but if the user clicks **More...** they can see other fields to add including **Statewide Contract ID** among others.

Creating Purchase Requisitions: Expert View

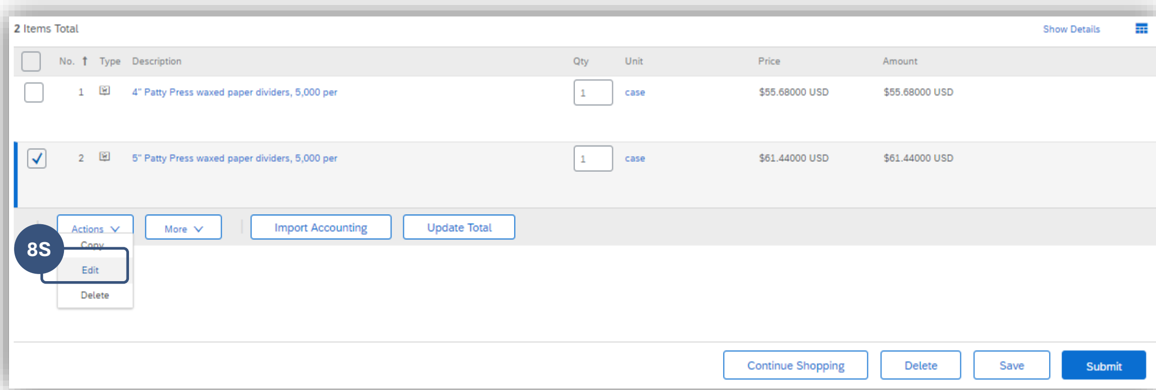


R. Place a checkmark in the box beside the line item to edit. That line item will be highlighted in gray. Users can select multiple line items to edit at once (called a **Mass Edit** and all edits will be applied across all line items) by checking each box individually or by checking the box on the header level which will automatically select every line item for edit.

Clicking on **Show Details** in the top right will display more line item information for each item. Alternatively, clicking **Hide Details** when this is expanded will return the view to a more limited scope. The only field that is editable at this level is the **Qty** field because this is a catalog item. Additional fields will be editable at this level for non-catalog line items.



S. To initiate the edits, click the **Actions** button below the bottom item and select **Edit**. Users will also have the option to **Copy** the selected line items or **Delete** them.



T. The **Line Item Details** page is displayed. All details related to this line item are shown on this page, where users can also update necessary information about the line item.

The fields that can be edited by a user are determined by the line item type being edited (non-catalog, catalog, or punchout). As a rule, more fields are editable for non-catalog orders than are editable for catalog orders.

U. Scroll down the page to the **Accounting – by Line Item** section. If the user does not have an **Account Code** defaulted in their profile, the system will prompt the user to fill it in with a notification at the top of the screen and a red outline surrounding the field. **Account Code** is a required field that must be completed in order to **Submit** the PR.

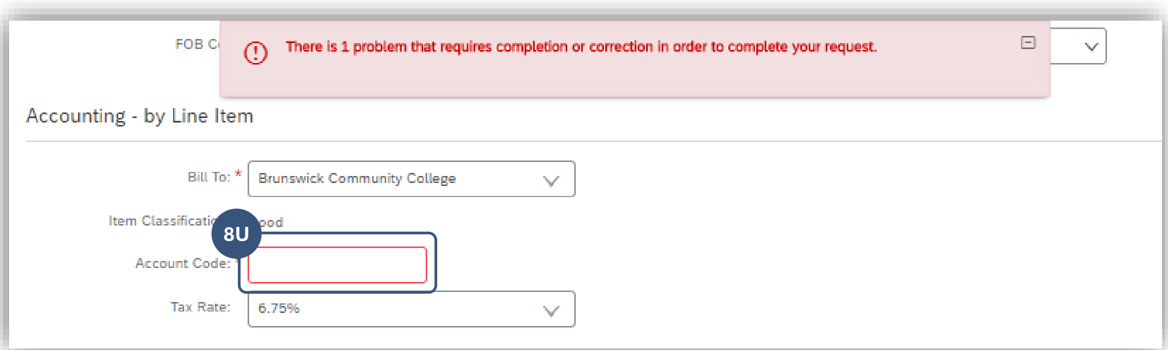
V. **Bill To:** Defaults from the users profile but can be modified using the drop-down menu. The Bill To code selected will determine the Bill To address that is printed on the line item. The invoice will be delivered to the specified address.

W. **Item Classification:** Set by commodity code and cannot be changed. A good commodity code will set the Item Classification to **Good** and a service commodity code will set the Item Classification to **Service.**

X. **Account Code:** The appropriate Account Code should be entered in the free-text field.

NC eProcurement does not validate the account codes entered in the **Account Code** field or encumber the purchase amount from the designated account code. All financial functions are still completed in the entitys financial system.

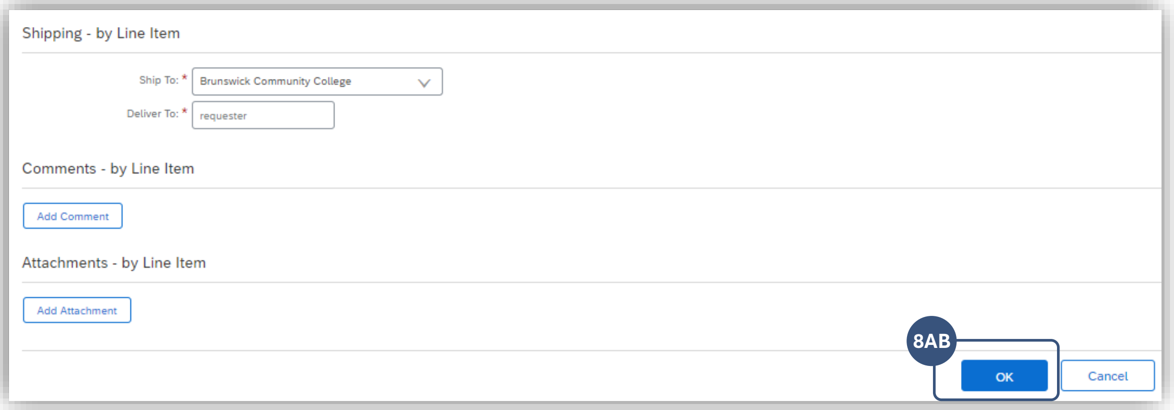
Y. **Tax Rates:** Defaults to the value set by the entity but can be changed using the dropdown menu.



Z. The **Shipping – by Line Item** section will display two fields that were previously set on the header level for the entire PR, **Ship To** and **Deliver To.** Edits made at the line item level will remain in place even if the user changes an overall setting on the **Summary** page.

AA. Although the system allows users to add **Comments** and **Attachments** at the line item level, they should avoid this and only add them at the header level on the **Summary** page. Attachments added on the line item level will not be sent to the supplier.

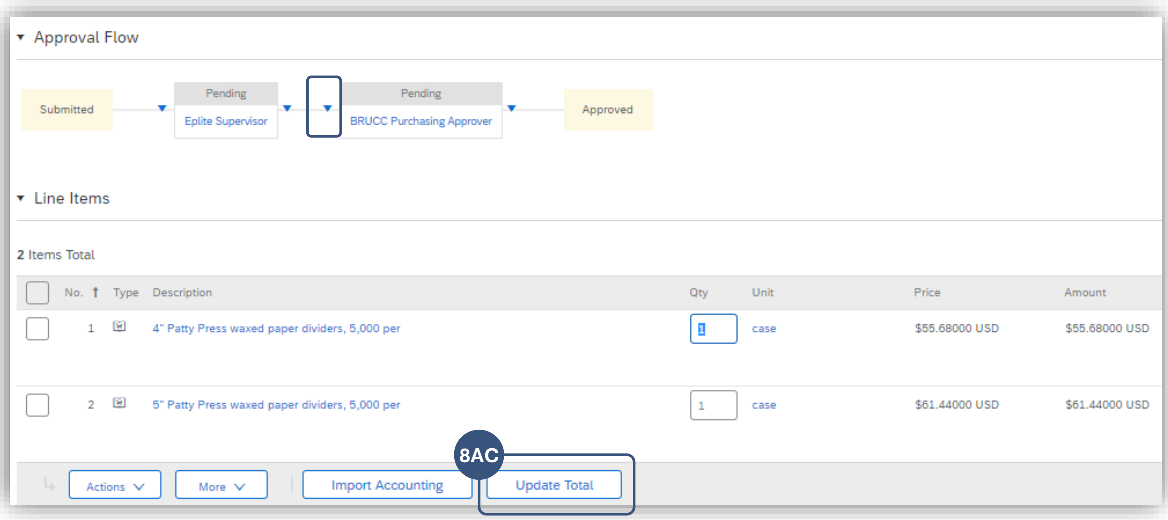
AB. When all necessary edits have been made, click the blue **OK** button at the top or bottom of the **Line Item Details** page to apply those changes and return to the **Summary** page.



AC. Back on the **Summary** page, please note three additional buttons next to the **Actions** button below the line items. The **More** and **Import Accounting** buttons should be ignored. The user can click the **Update Total** button if they make changes to any editable fields (i.e., **Qty**) in this view of the line items above and want the system to recalculate the **Amount.**

AD. Since all requisite information has been entered for all line items, the **Approval Flow** is now visible above the **Line Items** section.

Users will have the ability to manually add additional approvers at this point, but it is very important that they **Submit** the order first and then go back and add any approvers. If an approver is added at this point before the user clicks **Submit,** that approver will have to approve the Purchase Order again once it returns to NC eProcurement after being approved in the entitys financial system.



AE. At that top of the **Summary** page, the **Cart Summary** will provide a quick glimpse at the total dollar value and supplier included on the PR. The user should ignore the **Check** button within this summary.

The **Total** reflected here, as well as in the **Amount** field for each line item, does not reflect the inclusion of the **Tax Amount** or **Other Costs.** These calculations are not made until the PR is fully approved and sent to the entitys financial system. They will be visible in the financial system, and once the PR receives final approval there and is sent back to NC eProcurement as a Purchase Order, those fields will be populated and visible to both the user and supplier for a more inclusive picture of the total dollar amount owed to the supplier.

AF. Just above the **Cart Summary,** the user will have the option to print the PR by clicking the **Print** link. They can also return to the **Catalog** tab within the same shopping cart by clicking **Continue Shopping.** The PR can be deleted via the **Delete** button, or it can be saved to complete later by clicking the **Save** button.

AG. When all required information has been entered and verified for accuracy, the user should click the **Submit** button to send the PR to be approved by the approval flow. The user will see the status reflected as **Submitted** in their **My Documents** portlet on the **Procurement** tab.