

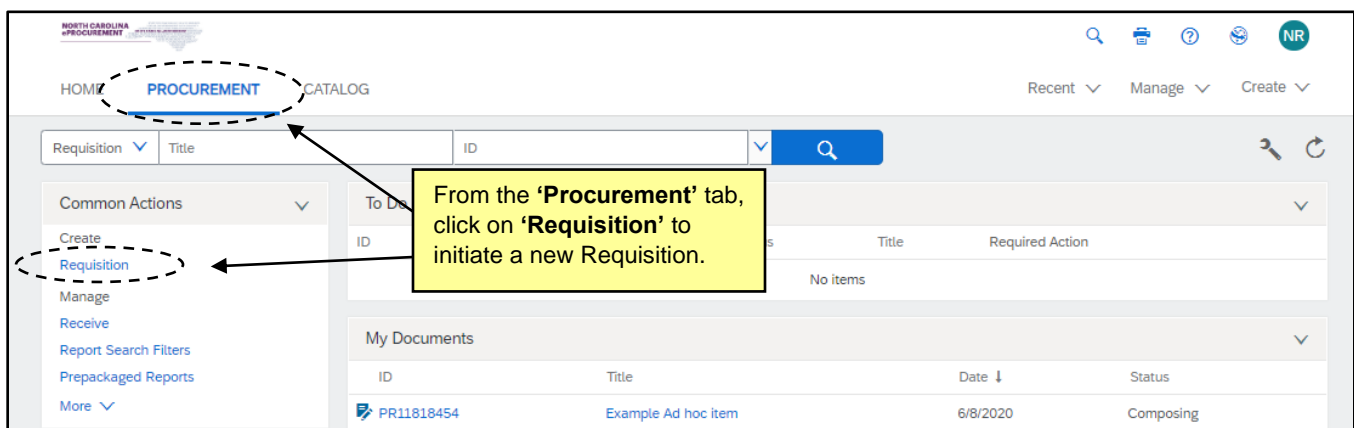
NC eProcurement

Creating Requisitions: Expert View

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

I. Creating a Requisition with Catalog Items

There are two ways to create a Requisition (RQ) 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 RQ to which the user can add more items, **'Check out'** those items, and **'Submit'** the RQ for approval.



II. Adding Catalog Items

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 Carolina's buyers by the Division of Purchase & Contract (P&C). Users may add catalog items to their RQ 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.'**

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

Notes:

- Searches recognize and return results for **'Keywords,' 'Supplier Part #,' 'Manufacturer,' 'Statewide Contract ID,'** or **'Category.'**
- The **'Search Bar'** will suggest results based on what's 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 they'd like to include. These can be hidden later by clicking **'Hide Search Options.'**

The screenshot shows the 'Catalog' page in the NC eProcurement system. The search bar contains the text 'paper'. Below the search bar, there are fields for 'Bid Number', 'Contract Type', and 'Statewide Contract ID'. A 'Hide Search Options' button is located above these fields. The page displays 'Recently Viewed Items' and 'Recently Viewed Suppliers' sections. Annotations include dashed boxes around the search bar, category dropdown, and search options, and callout boxes explaining their functions.

Callout 1 (Yellow): Enter search criteria in the **'Search Bar'** and click **'Enter'** or the magnifying glass icon.

Callout 2 (Yellow): Specific categories can be selected within which to limit the search by clicking the dropdown arrow to the left of the **'Search Bar.'** This selector defaults to **'All Categories.'**

Callout 3 (Yellow): Additional **'Search Option'** fields can be displayed below the **'Search Bar'** by clicking the dropdown arrow to its right and selecting which of the fields the user desires to display.

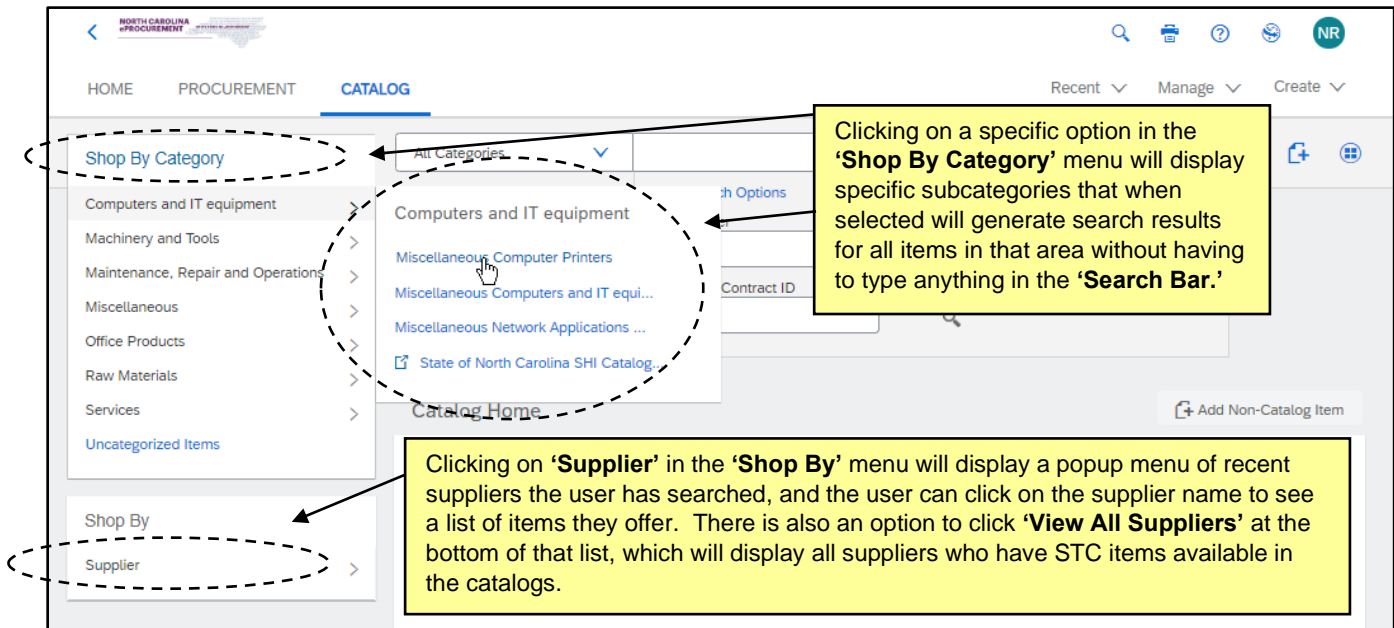
Callout 4 (Yellow): Both **'Recently Viewed Items'** and **'Recently Viewed Suppliers'** will display below the **'Search Bar.'**

Recently Viewed Items	
24" Cab protector for platform body GODWIN MFG CO INC \$217.00000 USD / each	4" Patty Press waxed paper dividers, 5,000 per THOMPSON & LITTLE, INC. \$55.68000 USD / case

Recently Viewed Suppliers			
GODWIN MFG CO INC Commercial and Milit... Machinery and Tools Transportation Compo... View All	THOMPSON & LITTLE, INC. Domestic Appliances ... Domestic Kitchenware Industrial Food and ... View All	[Unspecified] Live Plant and Anima... National Defense and... Other Services View All	SYSTEM BUSINESS EQUIPMENT CO. Computer Printers Computers and IT equ... Duplicating Machines View All

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2. After conducting the search, the results page will be displayed. It will provide further options for refining the search and evaluating the results.
3. 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.
4. 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.
5. 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.
6. 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.
7. **'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.'**
8. 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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 BUY

The 'Filter By' panel on the left side has a mini 'Search Bar' and suggested options to further refine the search. Clicking a link in the 'Search Path' allows users to move back through the search trail.

The 'View' can be set to 'List' or 'Grid' ('List' is show here), while the items can be sorted in multiple ways and will default to 'Relevance.' The user can select how many items are displayed on the search page by clicking the dropdown next to 'Viewing.'

- 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.

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

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

Review Details for Supplier

These are the details for the field you selected.

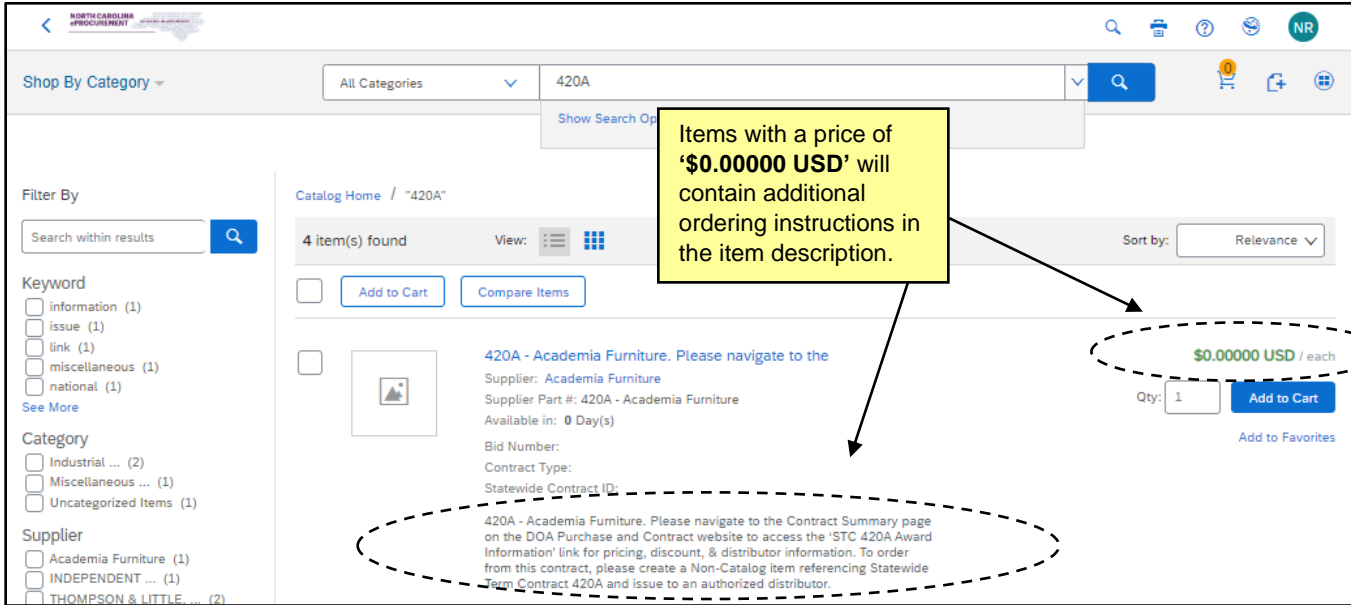
Company: THOMPSON & LITTLE, INC.
 Corporate Website: <http://thompsonlittle.com>
 Supplier: Yes
 Customer: No

Done

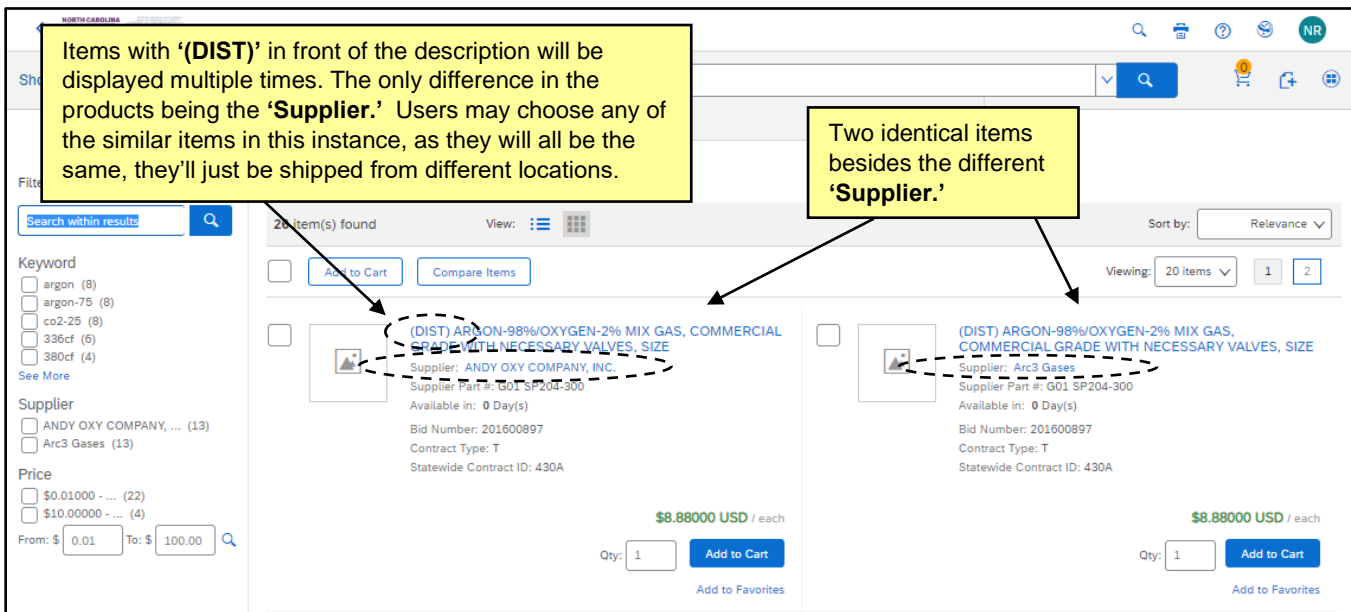
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12. Some catalog items are placeholders for additional ordering instructions. Items containing additional ordering instructions will reflect a price of **'\$0.00000 USD'** and will contain the necessary steps in the item description. Users should refer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



13. 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.

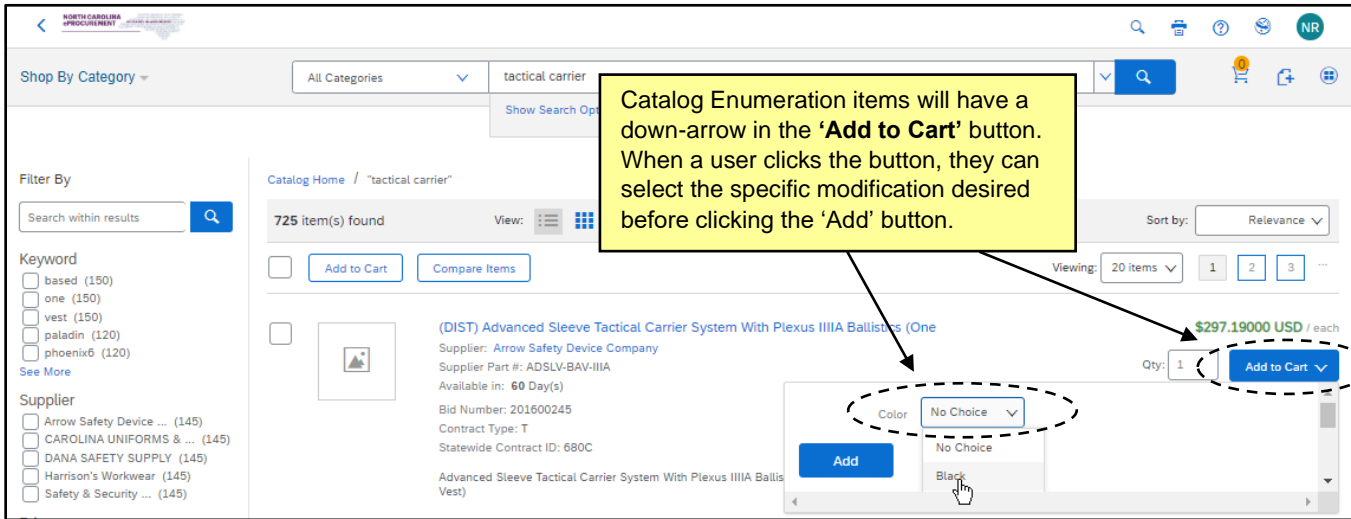


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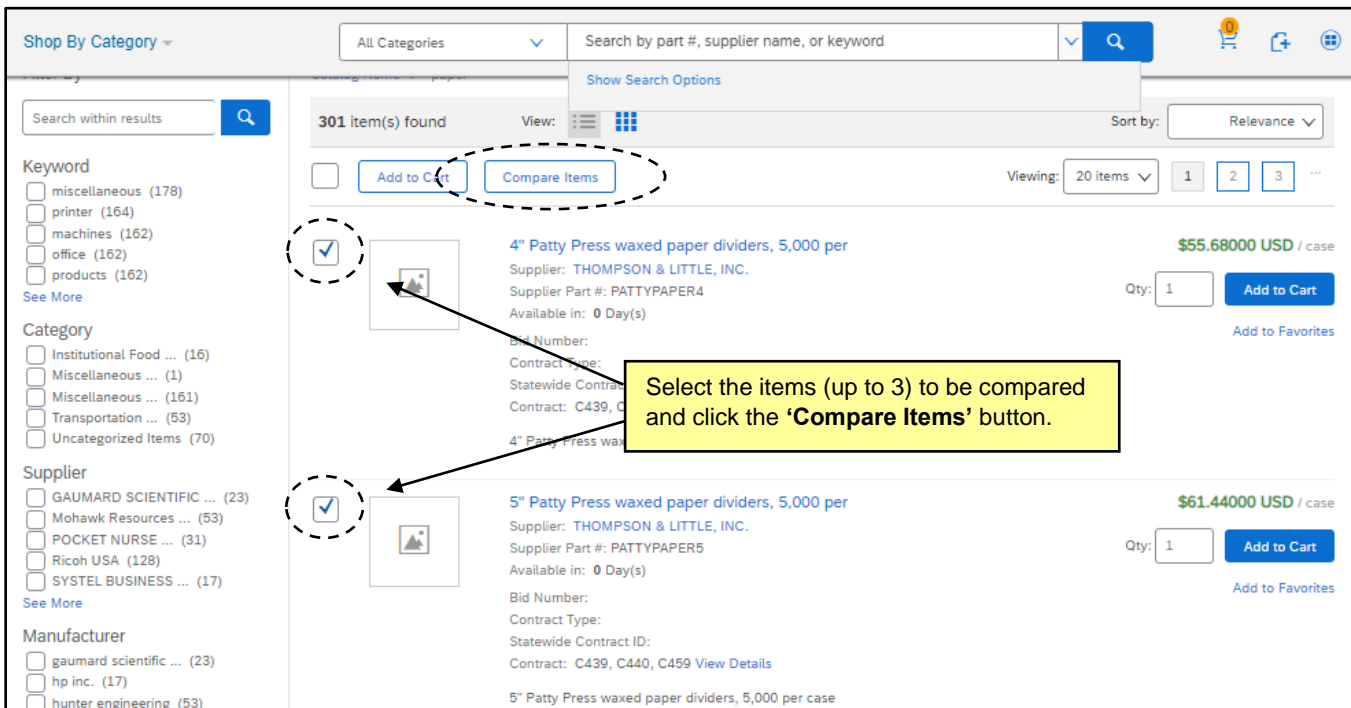
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14. Enumerations are STC items that have specific attributes associated with them and that require the user to select a preferred option before the item is added to the Requisition (e.g., size, color, delivery options). When an Enumeration item is 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.'**



15. 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.



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16. 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.

The selected items will display side-by-side for comparison. Click **'Continue Shopping'** to return to the search.

Price	\$55.68000 USD	\$61.44000 USD
Product Description	4" Patty Press waxed paper dividers, 5,000 per case	5" Patty Press waxed paper dividers, 5,000 per case
Supplier	THOMPSON & LITTLE, INC.	THOMPSON & LITTLE, INC.
Supplier Part #	PATTYPAPER4	PATTYPAPER5
Manufacturer	Globe	Globe

17. 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.

Note: Multiple catalog items can be added to the same RQ, 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 RQ, and the user will be notified with an error message. For this reason, a **'Non-Catalog item'** cannot be added to an RQ with a catalog item already on it.

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Adjust the quantity needed and click 'Add to Cart' on the right, or check the box to the left and click 'Add to Cart' at the top. To continue shopping, click the 'X' in the top right of the ensuing drop-down.

18. If the user clicks 'Review Cart,' a more detailed view of the shopping cart for that RQ 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 RQ.

On the 'Review Cart' page, check the box next to any items that are no longer wanted and click 'Delete.' Click 'Proceed to Checkout' to go to the 'Summary' page to complete the RQ.

No.	Type	Description	Qty	Unit	Price	Discount	Net Amount	Charges	Taxes
1		4" Patty Press waxed paper dividers, 5,000 per	1	case	\$55.68000 USD		\$55.68000 USD	\$0.00000 USD	\$5
2		5" Patty Press waxed paper dividers, 5,000 per	1	case	\$61.44000 USD		\$61.44000 USD	\$0.00000 USD	\$6

Cart Summary

- THOMPSON & LITT... (2) \$117.12000 USD
- Subtotal (2 Items) \$117.12000 USD

III. Adding Catalog Item Favorites

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.

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

1. To mark an item as a favorite, execute a catalog search for the desired item.
2. 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.

Shop By Category ▾ All Categories ▾ air filter 🔍

Search within results 🔍 2,896 item(s) found View: [List View] [Grid View] Sort by: Relevance ▾

Keyword: [Search] Add to Cart Viewing: 20 items ▾ 1 2 3 ...

Category: [Search] metal (1484) pleated (1456) synthe perfec self-su See More

Category: Industrial ... (36) Institutional Food ... (5) Miscellaneous ... (2855)

Supplier: Capital Air Filters ... (2855) THOMPSON & ... (44)

Manufacturer: aa air freudenberg ... (70) scotsman (32) viskon-aire (65) See More

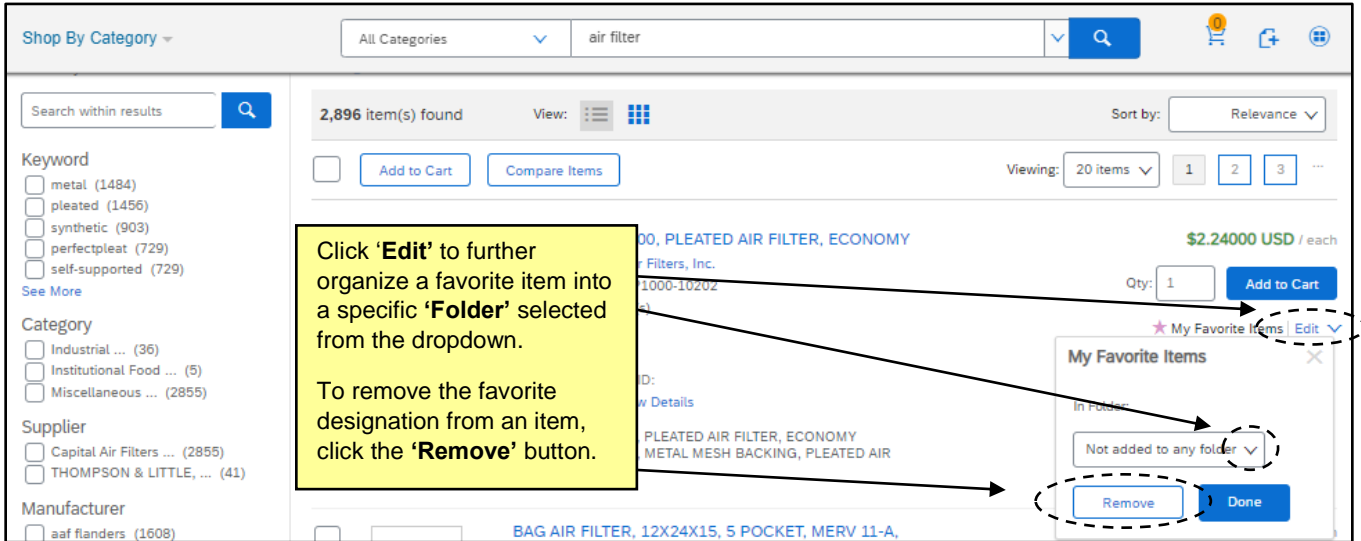
Indication that an item has been added as a favorite. → 10X20X2, AFP1000, PLEATED AIR FILTER, ECONOMY \$2.24000 USD / each
Supplier: Capital Air Filters, Inc.
Supplier Part #: AFP1000-10202
Available in: 7 Day(s)
Bid Number:
Contract Type:
Statewide Contract ID:
Contract: C386 View Details
Qty: 1
★ My Favorite Items | Edit ▾

Click the 'Add to Favorites' link to add the item as a favorite. → BAG AIR FILTER, 12X24X15, 5 POCKET, MERV 11-A, \$33.17000 USD / each
Supplier: Capital Air Filters, Inc.
Supplier Part #: RV1112241505- REVOLUTION 12X24X15 M11-A 5P
Available in: 0 Day(s)
Bid Number:
Qty: 1
Add to Favorites

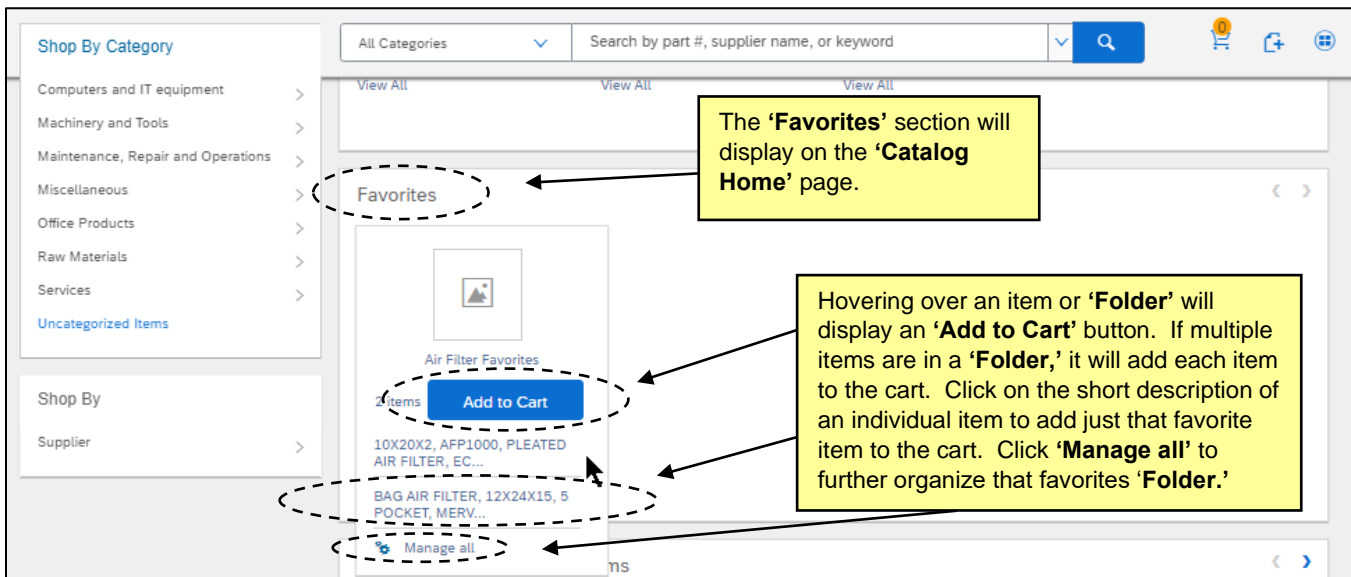
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- When an item has been marked as a favorite, the user can click the **'Edit'** dropdown next to the favorite indicator to further organize the item. They can click the ensuing drop-down to add the item to an existing **'Folder,'** or create a new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



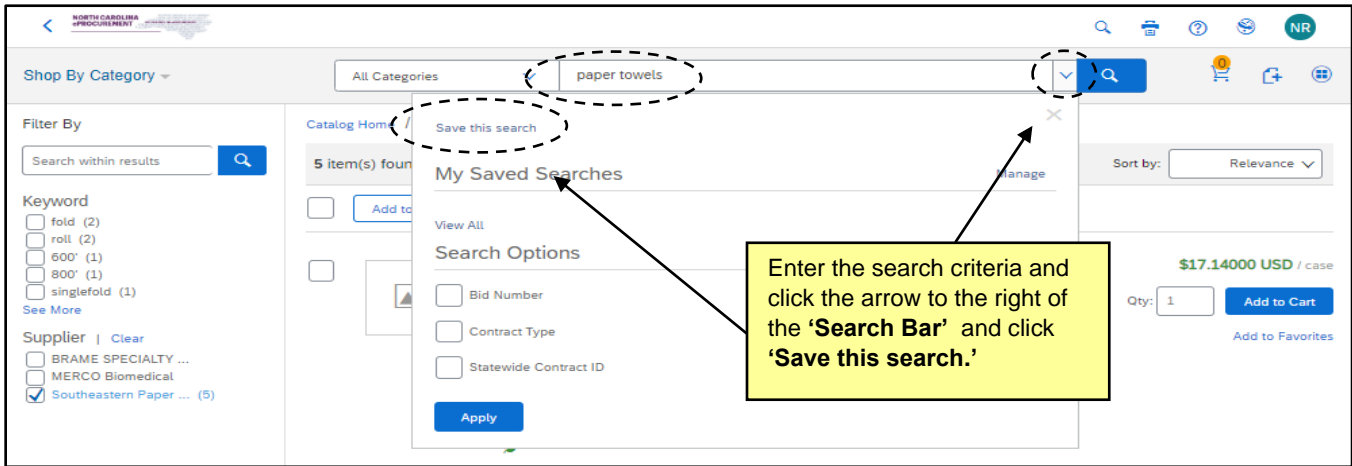
- Once an item has been marked as a favorite, it will display in the **'Favorites'** section on the **'Catalog Home'** page below the **'Recently Viewed Suppliers'** section, either within a **'Folder'** or just as itself if it was not organized within one. Hovering over the item or **'Folder'** will 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.'**



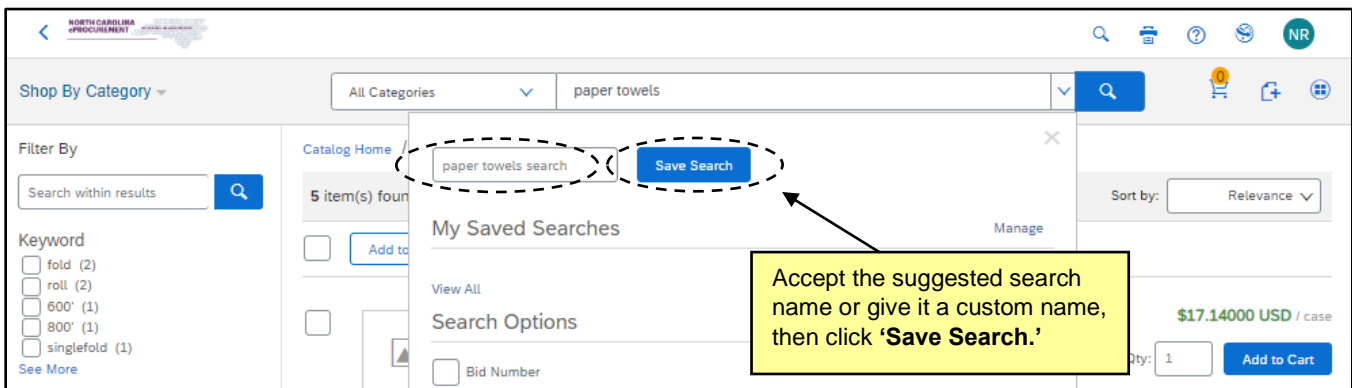
IV. Saving Catalog Searches

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 Requisition (RQ) on a regular basis.

1. 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.
2. Click the arrow to the right of the **'Search Bar'** and click **'Save this search'** from the ensuing dropdown.



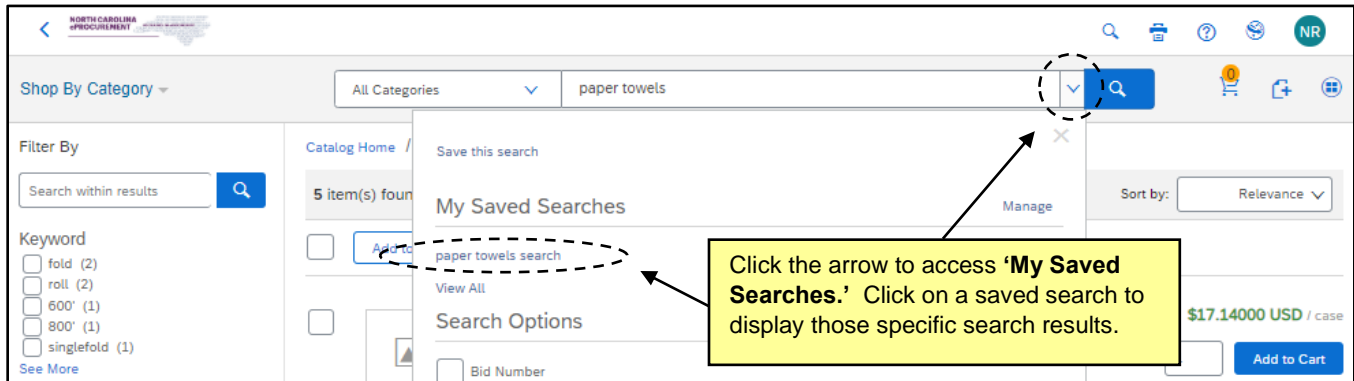
3. A suggested search name will populate in a free-text field next to a blue **'Save Search'** button. The user can accept the suggested name or rename it with another name of their choice, then click **'Save Search.'** A message will display notifying the user that the search has been saved.



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4. 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'** or **'Manage'** if there are too many saved searches to display in the dropdown. The subsequent screen will allow for further editing and searching.



V. Adding Punchout Catalog Items

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 supplier's punchout site. The supplier's website will automatically recognize users from NC eProcurement, and after the buyer has selected items on the supplier's website, the items are automatically transferred into NC eProcurement as line items on the Requisition (RQ). Once completed, the purchase order will be delivered to the supplier through NC eProcurement.

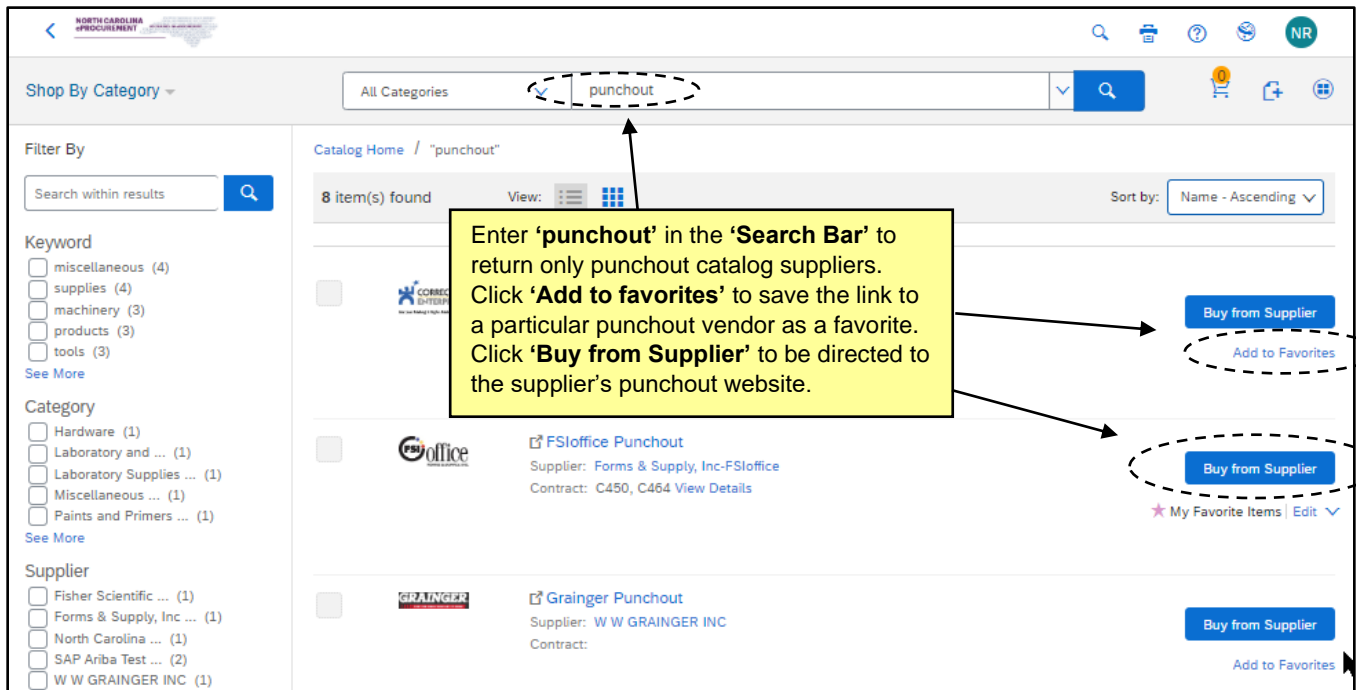
1. After clicking the **'Requisition'** link on the **'Procurement'** tab, start a search on the **'Catalog'** tab by entering text into the **'Search Bar,'** or by clicking on a **'Category'** or **'Supplier.'**
Note: The **'Search Bar'** will return results by **'Category'** (ex: Office Supplies), **'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.
2. Punchout catalog results will not show individual items with prices like standard catalog items. A catalog item with the supplier's name, logo, and a blue **'Buy from Supplier'** button will display for each punchout catalog link.

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

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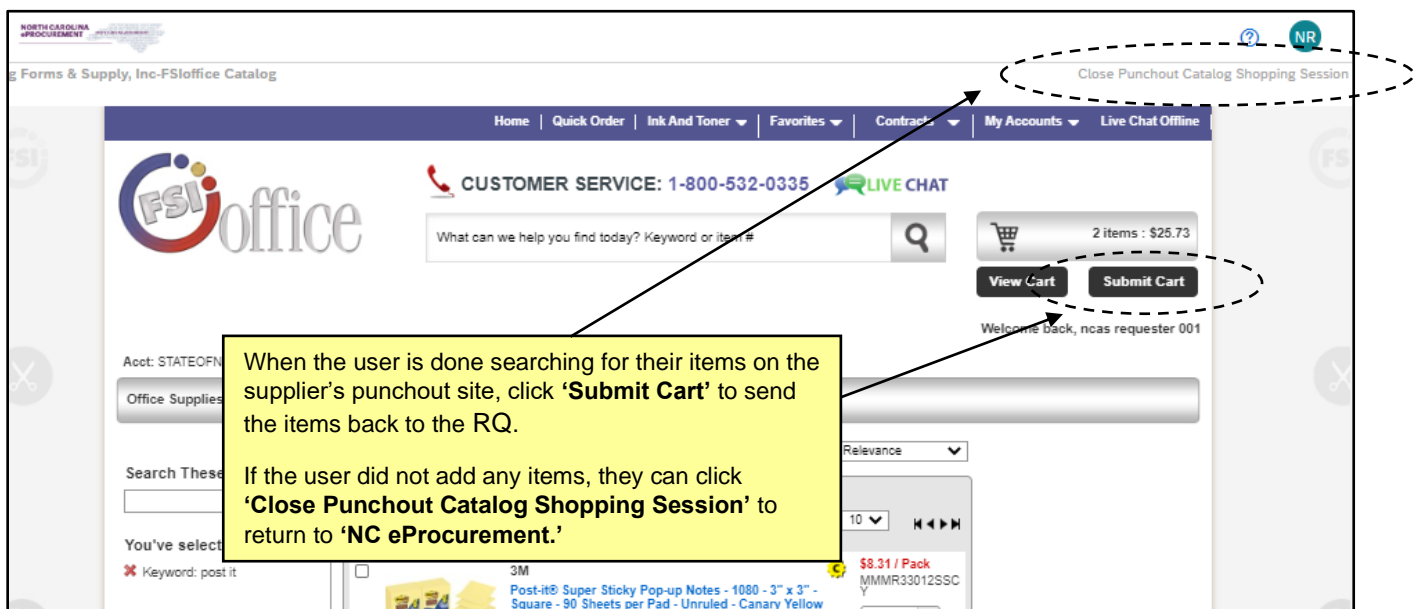
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- The user will be directed to the supplier's punchout catalog site. The page will still be branded with 'NC eProcurement' at the top, but the content of the site will be maintained by the supplier. Since the individual supplier creates their own punchout 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.

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

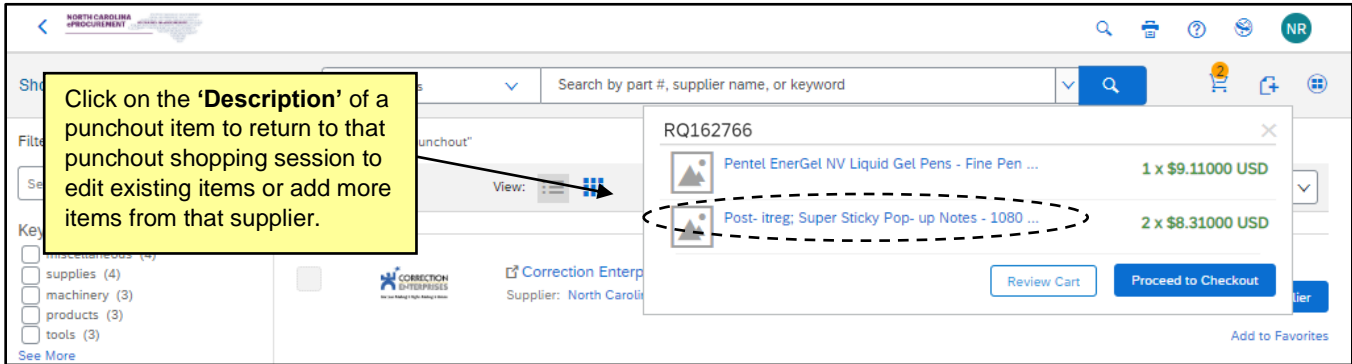


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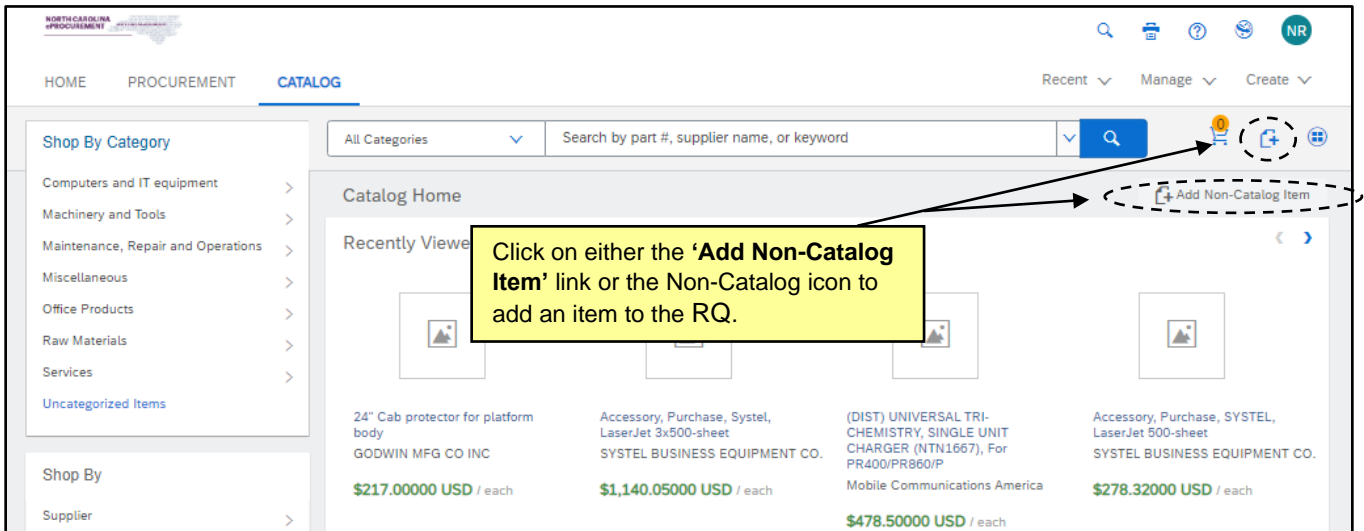
- Once the punchout item(s) have been sent back to NC eProcurement, if there is a need to edit the quantity of the item or to add additional punchout items from that catalog, the user will have to make those edits back on the supplier's punchout catalog site and re-submit their punchout cart. To access 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 RQ on the **'Summary'** page if the user has already clicked **'Proceed to Checkout.'**



VI. Adding Non-Catalog Items

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

- 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.



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

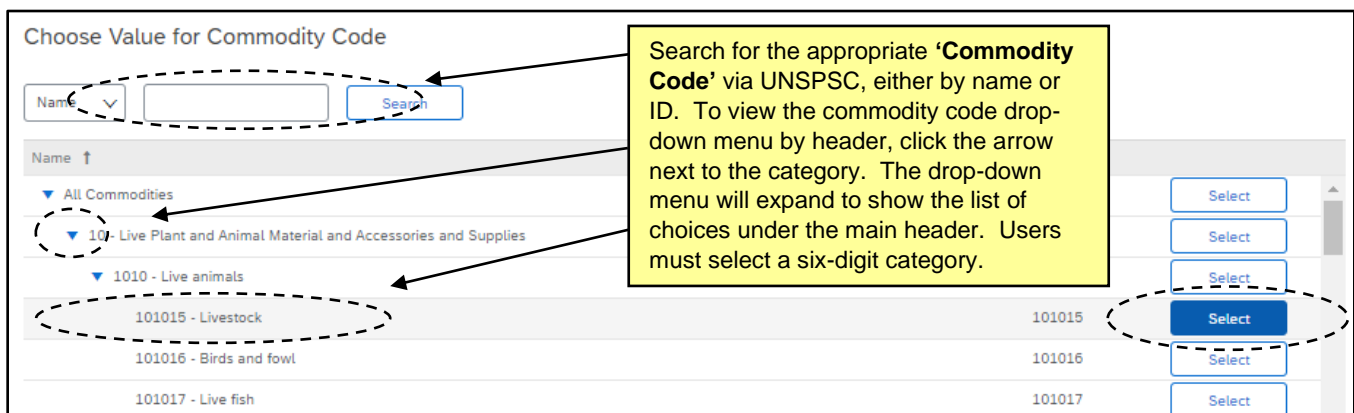
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- Payment Terms:** This field initially defaults to **'(no value)'** and can only be edited by a user with the **'Purchasing Agent'** role. Once a **'Supplier'** is selected below, it will change to **'N30.'**
- Commodity Code:** Locate the appropriate 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.

Notes:

- It is important to select the appropriate **'Commodity Code'** as the State of North Carolina uses this for reporting purposes. The 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 RQ 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.



- Quantity:** Enter the appropriate Quantity.
- 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.
- Price:** Enter the Price of the item.

Note: 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.
- Amount:** This field is automatically calculated based on the information entered above.
- Update Amount:** Click this button to recalculate **'Amount'** when changes are made to the added item.
- 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:

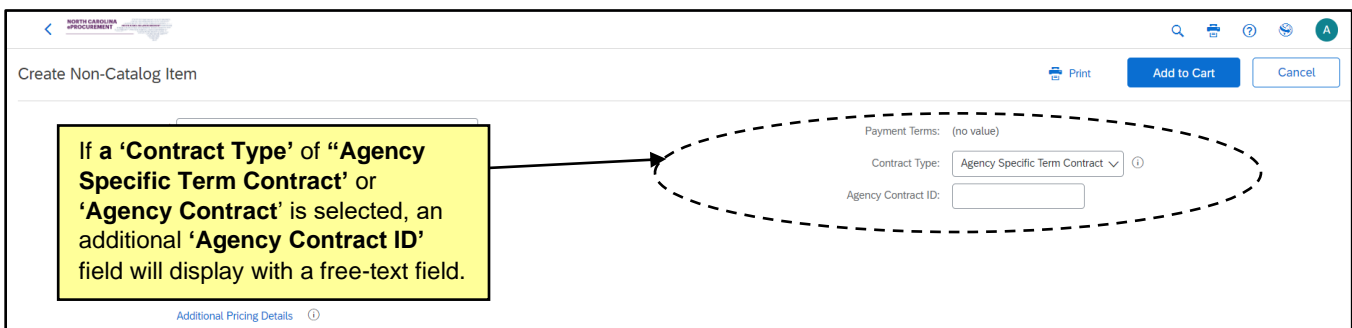
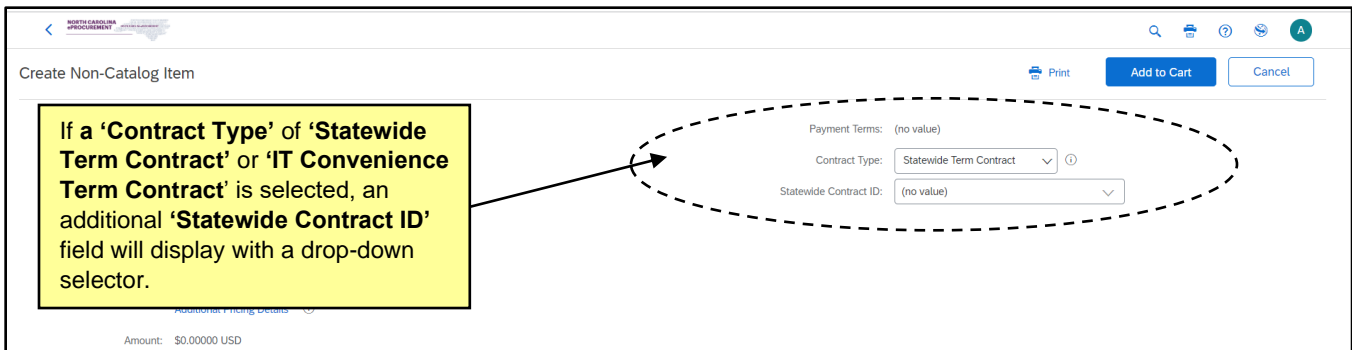
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- a. **Statewide Term Contract:** A contract for goods or services negotiated by P&C and available to all State purchasers. These items can often be found via the catalogs.
- b. **Agency Specific Term Contract:** A contract for goods or services negotiated by a specific Agency to cover a specific period of time. These items are not available via the catalogs.
- c. **IT Convenience Term Contract:** A contract for goods or services negotiated by DIT and available to all State purchasers. These items can often be found via the catalogs.
- d. **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.
- e. **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.

Note: Selecting **'Statewide Term Contract'** or **'IT Convenience Term Contract'** 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 **'Agency Specific Term Contract'** 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.



- 13. **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.'**

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14. **Supplier Location:** Click on **'Select'** if a different location for the supplier is preferred than the defaulted location once a supplier is selected.
15. **Supplier Part Number:** Enter the Supplier Part Number (if known). This will assist the vendor in shipping the correct item.
16. **Supplier Auxiliary Part Number:** Enter the Supplier Auxiliary Part Number (if known). This will additionally assist the vendor in shipping the correct item.
17. 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 it's corrected.

Fill in all applicable fields and click **'Add to Cart'** at the top or the bottom of the screen to add the non-catalog item to the RQ.

18. 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.

To add any additional non-catalog items, click the **'X'** and continue shopping, or if all of the desired items are present, click **'Proceed to Checkout.'**

VII. Selecting ‘Unit of Measure’ for Non-Catalog Items

When entering a ‘**Non-Catalog item**,’ users **must** follow the below ‘**Unit of Measure**’ guidelines that differ based on whether the item is classified as a ‘**Good**’ or a ‘**Service**.’ If the values entered into the fields are not aligned correctly, an error message will display under the ‘**Unit of Measure**’ field until they are properly aligned.

Note: ‘**Good**’ or ‘**Service**’ will be determined by the ‘**Category**’ (Commodity Code) set for the line item.

Line Item Classification	Unit of Measure (UOM)		
	Dollar*	Hour	All Others
Good	YES	YES	YES
Service	YES	YES	NO

*If ‘**Unit of Measure**’ is set to Dollar, the ‘**Price**’ must be \$1.00.

Good – UOM not Dollar

- Set the ‘**Quantity**’ to the total number of units to order.
- Set the ‘**Unit of Measure**’ to something other than ‘Dollar’ (example: ‘Each’).
- Set the ‘**Price**’ to the price of the individual unit.

When receiving this type of order, receive against the quantity ordered.

Good – UOM Dollar

- 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**.’

When receiving this type of order, receive against the dollar amount.

Service – UOM Dollar

- 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**.’

When receiving this type of order, receive against the dollar amount.

Service – UOM Hour

- 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.

When receiving against this type of order, receive against the number of hours.

VIII. Summary Page

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 Requisition (RQ) for accuracy. The approval flow for the RQ can be viewed on the **'Summary'** page as well.

1. Once on the **'Summary'** page, the RQ 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 RQ easily identifiable.
2. **'Entity'** defaults to the user's entity and can't be changed.
3. The **'On Behalf Of'** field will default to the requester's name. To create an RQ on behalf of another user, use the **'On Behalf Of'** drop-down menu and select that user's 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.
4. The **'Delay Purchase Until'** field allows the RQ to be submitted and approved but not be distributed to the supplier until the date specified.

Note: Funds will not be encumbered in NCFS until the date specified in the **'Delay Purchase Until'** field and a purchase order is successfully created with a status of **'Ordered.'**

5. 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.
6. Click **'Apply Label...'** to add a label to the RQ. In the drop-down, the user can select their default **'Archive Items,'** or create a **'New Label.'**
7. The **'Ship To'** field automatically defaults to the ship to location set up in the user's profile. Users may choose a different option by selecting **'Search more'** from the drop-down menu.

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

8. The **'Deliver To'** field indicates the recipient of the order. This free-text field can be populated with any value, most commonly with the requester's name. This field can be defaulted in the user's profile so that it is automatically filled.
9. The **'Need-by Date'** field is transmitted on the purchase order to the supplier as the date by which the items need to be delivered. The calendar icon next to the field may be used to select the appropriate date.
10. Comments may be added for the entire RQ using the **'Comments'** field. The requester may add only one comment on the header level of the RQ. If more comments are needed, they may be added after the RQ has been submitted. Click the **'Visible to Supplier'** box if it is desired that the comment be shared with the vendor.
11. Attachments may be added to the RQ at the header level by clicking the **'Add Attachment'** link.

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The 'Summary' tab will display the RQ# and 'Title' in the top left, above the editable section.

Leave the 'Suppress Order' box unchecked to send the order to the vendor.

Add comments at the header level in the 'Comments' box and check the 'Visible to Supplier' box to share it with the vendor.

Click the 'Add Attachments' link to add any relevant attachments.

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

Notes:

- 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.

Select the checkbox besides 'Visible to supplier on the purchase order' to include attachments on the purchase order.

13. Once an attachment has been added to an RQ, the user can add more attachments by clicking the 'Add Attachment' button below the newly visible 'Attachments' section. Users may also change an existing attachment's 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.

File Name ↑	Size	Creator	Visible to Supplier on Order
Sample Attachment.docx Download	11.6 KB	ADMIN Requester	<input type="checkbox"/>

Add Attachment

Delete

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14. 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 RQ 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.

The screenshot shows the 'Attachments' section with a table containing one attachment: 'Sample Attachment.docx' (14.4 KB, ADMIN Requester). Below this is an 'Add Attachment' button. The 'Approval Flow' section is collapsed, but a 'Show Approval Flow' button is visible and circled with a dashed line. A yellow callout box points to this button with the text: 'Once all required information has been entered in the RQ, the user can click the "Show Approval Flow" button to see the system generated approval flow.'

15. 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 RQ, most importantly, the financial information.

16. 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,' 'Net Amount,' 'Charges,' 'Taxes,'** or **'Amount.'**

Note: 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 **'Multi Year Indicator'** and **'Statewide Contract ID'** among others.

The screenshot shows the 'Line Items' section with a table of 2 items. The table has columns: No., Type, Description, Qty, Unit, Price, Discount, Net Amount, Charges, Taxes, Amount. The first item is '4" Patty Press waxed paper dividers, 5,000 per' and the second is '5" Patty Press waxed paper dividers, 5,000 per'. A yellow callout box points to the 'Table Options Menu' icon (a grid icon) in the top right corner of the table header, with the text: 'Click the "Table Options Menu" to select the fields that appear on the header line of the "Line Items" section.' Another yellow callout box points to the 'No.' header field, with the text: 'By default, line items are organized by the "No." header, but users can click on any other header fields in the gray box to organize by that field.'

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17. 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.

Note: 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.

No.	Type	Description	Qty	Unit	Price	Discount ↑	Net Amount	Charges	Taxes	Amount
1		4" Patty Press waxed paper dividers, 5,000 per	1	Case	\$55.68000	USD	\$55.68000 USD		\$0.00000 USD	\$55.68000 USD

Incoterms Code: (No Value) ⓘ
 Supplier Part #: PATTYPAPER4
 Commodity Code: 481015 - Cooking and warming equipment
 Supplier: THOMPSON & LITTLE, INC.
 Supplier Location: THOMPSON & LITTLE, INC.
 Payment Terms: Net 30 - PAY IN 30 DAYS
 Contract Type: No Contract ⓘ

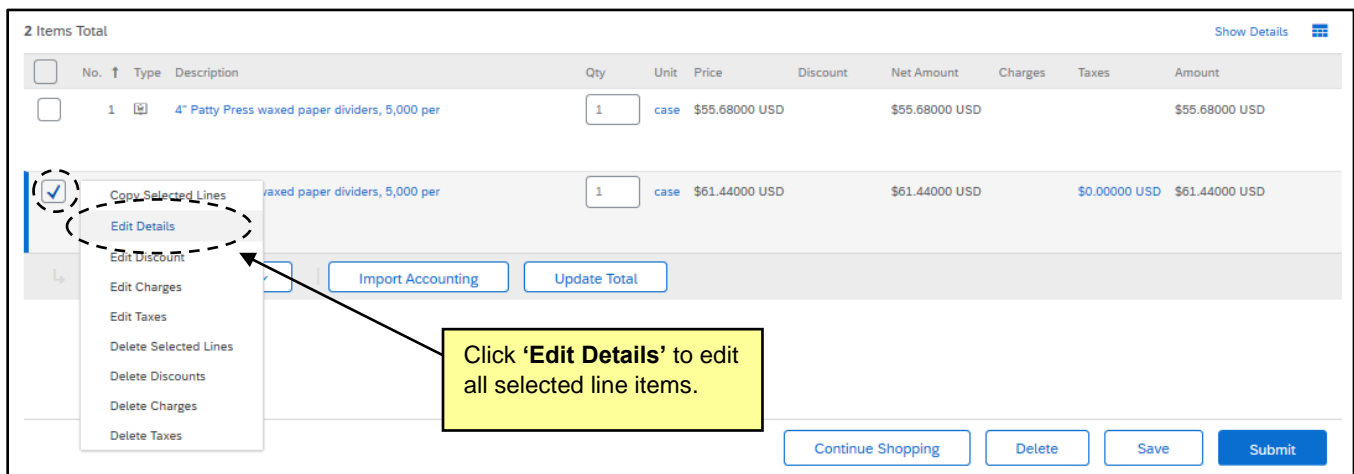
18. To initiate the edits, click the **‘Actions’** button below the bottom item. A popup menu will display with the following options for the user to select.

- a. **Copy Selected Items:** This will copy the selected line item and place the new version below the last line item.
- b. **Edit Details:** The most commonly used selection when editing a line item. This will allow the user to view and edit the required accounting information.
- c. **Edit Discount:** Disregard this option.
- d. **Edit Charges:** A popup screen will display, and the user can use this to enter special **‘Shipping Charges’** or **‘Other Costs.’** This should NOT take the place of shipping charges that are included in catalog items or for adding an additional service line item on a non-catalog order. This should be used in limited circumstances when an additional charge cannot be added to an RQ with a catalog item on it to which a non-catalog item cannot be added.
- e. **Edit Taxes:** For State Agencies the tax rate always defaults to **‘US-EXEMPT,’** but users can apply a tax rate if needed by selecting a rate from the popup menu.
- f. **Delete Selected Lines:** This will delete the selected line item.
- g. **Delete Discounts:** Disregard this option.
- h. **Delete Charges:** This option will delete any **‘Charges’** the user manually added.
- i. **Delete Taxes:** This option will delete and **‘Taxes’** the user manually added.

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19. Click the **'Edit Details'** link in the popup menu.



20. 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.

Note: 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.

21. The **'Incoterms Code'** (Freight on Board) reflects how freight charges for the order are paid. This value defaults to **'001.'** Users may select a different option that better meets the agency purchasing policies by using the drop-down menu.

22. Scroll down the page to the **'Accounting – by Line Item'** section. If the user does not have any of these fields defaulted in their profile, the system will prompt the user to fill these in with a notification at the top of the screen and red outlines surrounding the fields with missing information. **'Agency,' 'Budget Fund,' 'Natural Account,' 'Agency Management Unit,' 'Agency Program,' 'Funding Source,' 'Project,'** and **'Inter-fund'** are all required fields that must be completed in order to **'Submit'** the RQ.

23. **Bill To:** Defaults from the user's 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.

24. **Agency:** A Unit of the executive, legislative, or judicial branch of State government, such as a department, institution, or division.

25. **Budget Fund:** A fiscal and accounting entity with the purpose of carrying on stated programs and activities.

26. **Natural Account:** Defines the type of expenditures.

27. **Agency Management Unit:** An agency defined org structure for internal management reporting and budgeting.

28. **Agency Program:** Agency programs or functions for internal management reporting and budgeting.

29. **Funding Source:** Source underlying expenditures such as appropriations, federal grant, local funds, etc.

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30. **Project:** Segment related to projects in the Projects module.

31. **Inter-Fund:** Transfers between Budget Funds

32. **Future 1, 2, 3:** Reserved for future use.

Notes:

- The above chart of accounts fields can be defaulted based on the values selected in the user’s profile. The defaulted values can still be edited on each line item if it is necessary that they be changed.
- The accounting fields are generated to ensure only valid NCFS general ledger accounting combinations are selected in the dropdowns. The values in these fields must match a valid accounting combination. The system will not prevent a user from selecting an invalid combination in the dropdowns, but an error message will immediately display if the combination is not valid. If the selected accounting combination is not valid, users may have to back out all information from subsequent fields by selecting **‘(no value)’** from the **‘Search more’** menu. For example, to update the **‘Agency’** field users may have to set the **‘Budget Fund’** and **‘Natural Account’** fields to **‘(no value)’** first.

33. **Multi Year Indicator:** Defines the fiscal year for which the funds on this Requisition should be encumbered. This is a dropdown field that defaults to **‘Unspecified,’** but the user can select future fiscal years from the dropdown should that be necessary.

34. **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.’**

35. **Government Grant ID:** This field is only present in when certain accounting combinations are selected. It is a free text field where the user can enter in the details of any State grants awarded to their organization if applicable to the purchase.

36. **Split accounting:** Line items can be split across multiple accounting segments using the split accounting function. Accounting distributions can only be split by **‘Quantity’** and the entire quantity of the line item will need to be allocated across the split distributions. Users can add additional splits by clicking **‘Add Split’** and can view Unallocated and Total quantities at the bottom of the page.

Statewide Contract ID: 2219B: Grounds M. ! There are 10 problems that require completion or correction in order to complete your request. Mouse over the red icons to learn more. Use the *Next* and *Previous* links to step through the errors as needed. [< Previous](#) | [Next >](#)

Accounting - by Line Item

Bill To: A05

Agency: 1300 - DEPARTMENT OF ADMINISTRAT... (no value)

Budget Fund: (no value) (no value)

Natural Account: (no value) (no value)

Agency Management Unit: (no value) (no value)

Agency Program: (no value) (no value)

Funding Source: (no value) (no value)

Project: (no value) (no value)

Inter-fund: (no value) (no value)

Future 1: 0000 - DEFAULT

Future 2: 000000 - DEFAULT

Future 3: 000000 - DEFAULT

Multi Year Indicator: Unspecified

Item Classification: Good

[Split Accounting](#)

There are eight chart of account fields that are required for an RQ. The system will indicate they must be entered in a valid combination with red borders surrounding the dropdown fields and an error message at the top of the screen. Both will disappear once the information has been correctly entered.

To use multiple accounting distributions for a single line item, click on **‘Split Accounting’**.

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Split Accounting

Accounting Information

Agency: 2000 - DHHS CENTRAL ADMINISTRATION

Budget Fund: 014410 - DHHSADMIN 14410 CLE...

Natural Account: 52799000

Agency Management Unit: 00000000 - D...

Agency Program: 00000000 - DEFAULT AGENCY PROGRAM

Funding Source: 0000 - UNDESIGNATED

Project: 0000000000 - DEFAULT PROJECT

Inter-fund: 000000 - DEFAULT BUDGET FUND

Split Quantity: 5

Action: Add Split, Update, Delete

Unallocated: 0
Total: 10

OK Cancel

Set the 'Split Quantity' for each accounting distribution.

The system will default to two split accountings. Click 'Add Split' if additional splits are needed.

View the Unallocated and Total quantities. The entire quantity of the line item will need to be fully allocated across the split accounting distributions.

37. The **'Shipping – by Line Item'** section will display three fields that were previously set on the header level for the entire RQ, **'Ship To,' 'Deliver To,'** and **'Need-by Date.'** Edits made at the line item level will remain in place even if the user changes an overall setting on the **'Summary'** page.
38. The **'Charges – By Line Item'** will allow the user to enter special **'Shipping Charges'** or **'Other Costs.'** Click **'Add'** and from the popup menu select the **'Charge Type,'** (Shipping or Other), whether the charge should be applied as a dollar **'Amount'** or **'Percentage,'** then select that value and click **'Apply.'**

Shipping - by Line Item

Ship To: 437

Deliver To: requester

Need-by Date: [Calendar Icon]

Charges - By Line Item

Charges

Charge Type	Net Amount	Tax Code	Taxes	Amount
No items				

Add

Shipping information can be edited at the line item level if necessary.
Click the 'Add' button to include special 'Charges.'

39. The **'Taxes – by Line Item'** section will default to **'US-EXEMPT'** and thereby apply no tax on any items. If taxes need to be added for any reason, click the **'Tax Code'** dropdown, select **'Search more,'** and select the applicable tax rate. The system will automatically calculate the dollar amount to be charged.
40. **'Comments'** and **'Attachments'** can be added at the line item level, but it is strongly suggested that they only be added at the header level on the **'Summary'** page. That makes it easier for all other users and the supplier to see any important comments or attachments.
41. 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.

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Taxes - By Line Item

Tax Code: US-EXEMPT

Name	Is Deductible	Accounting	Rate	Applied On	Amount
0.00% Sales Tax	No	Same as Line Item	0.0%	\$61.44000 USD NetAmount	\$0.00000 USD

Tax Amount: \$0.00000 USD

Comments - by Line Item

[Add Comment](#)

Attachments - by Line Item

[Add Attachment](#)

Taxes can be added by clicking the 'Tax Code' dropdown and changing the default 'US-EXEMPT' setting to the applicable tax rate.

It is not advised to add 'Comments' or 'Attachments' at the line item level, but the option exists.

Click 'OK' to apply any edits to the line

OK Cancel

42. 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.'**

43. When all requisite information is entered for all line items, the **'Approval Flow'** will become visible above the **'Line Items'** section. Users can manually add additional approvers by clicking between existing approvers and selecting the desired approver from the dropdown.

Approval Flow

Submitted → Pending (ADMIN Supervisor) → Pending (ADMN Budget Approver) → Watcher (ADMN Chief Procurement Officer) → Approved

Line Items

No.	Qty	Unit	Price	Discount	Net Amount	Charges	Taxes	Amount
1		case	\$55.68000 USD		\$55.68000 USD		\$0.00000 USD	\$55.68000 USD
2	1	case	\$61.44000 USD		\$61.44000 USD		\$0.00000 USD	\$61.44000 USD

Users should ignore the 'More' and 'Import Accounting' buttons but can click 'Update Total' if there is a need to recalculate the 'Amount.'

Users can add manual approvers by clicking the arrows between existing approvers.

Actions More Import Accounting Update Total

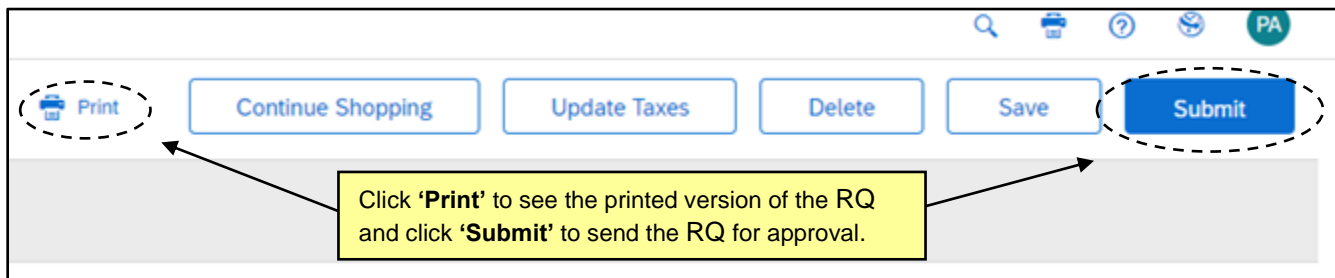
44. At that top of the **'Summary'** page, the **'Cart Summary'** will provide a quick glimpse at the total dollar value and supplier included on the RQ. The user should ignore the **'Check'** button within this summary.

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

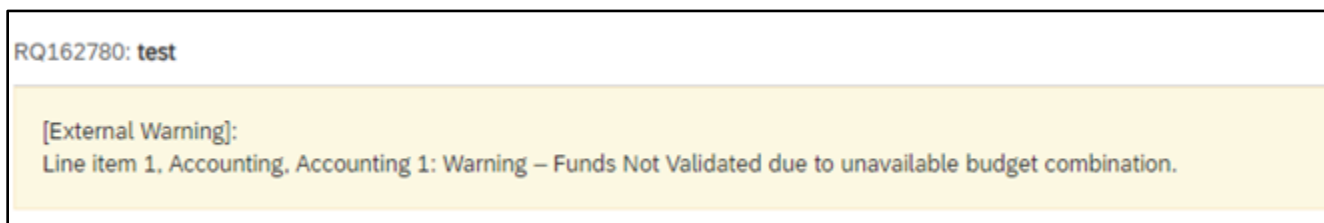
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46. When all required information has been entered and verified for accuracy, the user should click the **'Submit'** button to send the RQ for budget check.



47. Upon clicking **'Submit'**, the requisition will be routed to NCFS for budget check. If the budget check is unsuccessful, a warning message will appear. Users can choose to click **'Prev'** to return the requisition to **'Composing'** status and make corrections or can proceed with submission by again clicking the **'Submit'** button. Unsuccessful budget checks will not prevent requisition submission, subsequent approvals, or PO creation.



48. Once the requisition is submitted, the RQ status will be updated to **'Submitted.'** Click **'View requisition'** to revisit RQ details. To view the status of the budget check, find the **'Budget Check Status'** field. If the budget check was successful, the status will be displayed as "Pass". Any unsuccessful budget checks will display the warning message in this field, but requisition approvals and purchase order creation will not be prevented. Alternatively, the **'History'** tab will display the **'Budget Check Status'** as well.

