## **RONIC VENDOR PORTAL HUB CERTIFIED V NC** eProcurement **Creating Purchase Requisitions: Expert View**

This process guide provides instruction on the functional steps to create a Purchase Reguisition (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.

**STATE DEPARTMENT STATE BRANCH** LOCAL GOVERNMENT CITY COUNT NORTH CAROLINA ePROCUREMENT PURCHASE

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#### I. Creating a Purchase Requisition with Catalog Items

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.

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HOME PROCUREMENT CATAL	LOG			Recent 🗸	Manage 🗸	Create 🗸
Requisition V Title	ID	✓ (	2			२ ८
Common Actions	From the ' <b>Proc</b> click on ' <b>Requis</b> new Purchase I	<b>sition'</b> to initiate a Requisition.	Title	Required Action		~
Manage Receive Report Search Filters	My Documents	Jo	) items			~
Prepackaged Reports More 🗸	ID	Title Example Ad hoc item		Date ↓ 6/8/2020	Status Composing	

#### П. 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 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.'

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.

- 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.'



HOME PROCUREMENT CATAL	OG	Q 🖶 🕐 🤇 Recent 🗸 Manage 🗸	S NR
Shop By Category         Computers and IT equipment         Machinery and Tools         Maintenance, Repair and Operations         Miscellaneous         Office Products         Raw Materials	Att Categories	Clicking on a specific option in the <b>'Shop By Category'</b> menu will display specific subcategories that when selected will generate search results for all items in that area without having to type anything in the <b>'Search Bar.'</b>	(† III)
Services > Uncategorized Items Shop By Supplier >	suppliers the user has searched, and a list of items they offer. There is als	C Add Nor-C By' menu will display a popup menu of rece d the user can click on the supplier name to so an option to click 'View All Suppliers' at all suppliers who have STC items available	ent o see t the

- 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.
- '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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 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.

- 10. If a user clicks on the blue description of the item, a detailed view of the item will display.
- 11. 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.



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 PR.

		a 🖶 🕐 🛞 💦
Shop By Category -	All Categories V 420A	v 🔍 🦉 🗗 🗒
Filter By	Show Search Op     Items with a price of       '\$0.00000 USD' will       Catalog Home / "420A"	
Search within results Q	4 item(s) found View:	Sort by: Relevance V
Keyword information (1) issue (1) link (1) miscellaneous (1) See More	Add to Cart Compare Items  420A - Academia Furniture. Please navigate to the Supplier: Academia Furniture Supplier Part #: 420A - Academia Furniture Available in: 0 Day(s)	\$0.00000 USD / each Qty: 1 Add to Cart
Category Industrial (2) Industrial (2) Incategorized Items (1) Supplier Academia Furniture (1) INDEPENDENT (1) THOMPSON & LITTLE (2)	Bid Number: Contract Type: Statewide Contract ID: 420A - Academia Furniture. Please navigate to the Contract Summary page on the DOA Purchase and Contract website to access the 'STC 420A Award Information' link for pricing, discount, & distributor information. To order from this contract, please create a Non-Catalog item referencing Statewide Term Contract 420A and issue to an authorized distributor.	Add to Favorites

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.

displayed multiple products being th the similar items i	)' in front of the description will be e times. The only difference in the e ' <b>Supplier.</b> ' Users may choose any of n this instance, as they will all be the be shipped from different locations.	Two identica besides the 'Supplier.'	
Search within results         Q           Keyword         argon (8)         argon 75 (8)           co2-25 (8)         336ct (6)         336ct (4)	2Nitem(s) found     View: :=		Sort by: Relevance Viewing: 20 items VI 2 (DIST) ARGON-98%/0XYGEN-2% MIX GAS, COMMERCIAL GRADE WITH NECESSARY VALVES, SIZE Supplie: Ar3 Gases
See More Supplier ANDY OXY COMPANY, (13) Arc3 Gases (13) Price \$0.01000 (22)	Available in: 0 Day(s) Bid Number: 201600877 Contract Type: T Statewide Contract ID: 430A		Suppler Park 601 SP204-300 Available in: 0 Day(s) Bid Number: 201600897 Contract Type: T Statewide Contract ID: 430A
\$10.0000 (4) From: \$0.01 To: \$100.00 Q	\$8.88 Qty: 1	000 USD / each Add to Cart Add to Favorites	\$8.88000 USD / each Qty: 1 Add to Cart Add to Favorites

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 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 downarrow 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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Shop By Category ~ Filter By Search within results	All Categories     tactical carrier       Show Search Opt       Catalog Home / "tactical carrier"       725 item(s) found	Catalog Enumeration items will have a down-arrow in the 'Add to Cart' button. When a user clicks the button, they can select the specific modification desired before clicking the 'Add' button.
Keyword           Dased (150)           one (150)           yest (150)           paladin (120)           phoenix6 (120)           See More           Supplier           Arrow Safety Device (145)           DANA SAFETY SUPPLY (145)           Harrison's Workwear (145)           Safety & Security (145)	Supplier: Arrow Safety Device Supplier Part #: ADSLV-BAV-IIU Available in: 60 Day(s) Bid Number: 201600245 Contract Type: T Statewide Contract ID: 680C	

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.



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.

Shop By Category –	All Categories 🗸	Search by part #, supplier name, o	or keyword	<mark>۲</mark> ۹	<u>_</u>	G	
Compare Catalog Home / "paper" / Compare		Show Search Options aper dividers, 5,000 per The selected i display side-by comparison. ( 'Continue Sh to return to the Add to Cart	tems will y-side for Click opping'	y Press waxed paper divide \$61.44000 USD / case Qty: 1 Add to C		bing	
Price	\$55.680	00 USD		\$61.44000 USD			
Product Description	4" Patty Press waxed pape	er dividers, 5,000 per case	5" Patty	/ Press waxed paper dividers, 5	5,000 per case		
Supplier	THOMPSON &	LITTLE, INC.		THOMPSON & LITTLE, INC	c.		
Supplier Part #	PATTYP	APER4		PATTYPAPER5			
Manufacturer	Glo	be		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 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.

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hop By Category –	All Categories	✓ S	earch by part #, supplier name, or keyword	✓ Q	<u></u> <u></u> <u></u> <u></u> <u></u>	
lter By	Catalog Home / "paper"		* This item has been recently added         * Patty Press waxed paper dividers, 5,000 p	ier 1x\$	( <u>×</u> ) 55.68000 USD	
Search within results Q eyword inscellaneous (178) printer (164) diffice (162) office (162) office (162) exe More ategory Institutional Food (16) Miscellaneous (1) Miscellaneous (161) Transportation (53)	301 item(s) found	View: Compare Items Supplier: THC Supplier: THC Supplier THC Supplier Part Available in: I Bid Number: Contract Type Statewide Co Contract: C4:	Adjust the quantity need click ' <b>Add to Cart</b> ' on the or check the box to the le click ' <b>Add to Cart</b> ' at the click ' <b>Add</b> to <b>Cart</b> ' at the cli	eft and top.	eed to Checkout ems v 1 2 3 ··· \$55.68000 USD / ca Qty: 1 Add to Cart Add to Favori	ase
Uncategorized Items (70)		4" Patty Press	s waxed paper dividers, 5,000 per case			

18. 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.

			a	k 📅 🕐 😌 💦
Shop By Category –		Search by part #, supplier name, or keyword	✓	۹ 😫 🚊
	On the <b>'Review Cart'</b> page, check the box next to any items	Show Search Options		
PR11818853:	that are no longer wanted and click ' <b>Delete.'</b> Click ' <b>Proceed to Checkout</b> '		Continue Shopping	Proceed to Checkout
2 Items Total	to go to the <b>'Summary'</b> page to complete the PR.	Show Details	Cart Summary	
No. 1 Type	Description Qty Unit Price Discour 4" Patty	nt Net Amount Charges Taxes	THOMPSON & LITT	(2) \$117.12000 USD
	Press waxed paper 1 case \$55.68000 USD dividers, 5,000 per	\$55.68000 USD \$0.00000 USD \$	\$5! Check	\$117.12000 USD
	5" Patty Press waxed 1 case \$61.44000 USD dividers, 5.000 per	\$61.44000 USD \$0.00000 USD \$	\$6:	
Delete		Update Total	•	

#### **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.

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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	v Q 🤗 🗗 🖲
Search within results Q Keyword metal (1484) pleated (1456)	2,896 item(s) found	View:	Sort by: Relevance V Viewing: 20 items V 1 2 3
synthe     perfec     see More     Category     Industrial (36)     Institutional Food (5)     Miscellaneous (2855)     Supplier     Capital Air Filters (2855)     THOMEON & LITTLE (41)     Manue     Click the 'Add to F	a favorite.	10X20X2, AFP1000, PLEATED AIR FILTER, ECONOMY Supplier: Capital Air Filters, Inc. Supplier Part #: AEP1000-10202 Available in: 7 Day(s) Bid Number: Contract Type: Statewide Contract ID: Contract: C386 View Details 10X20X2, AFP1000, PLEATED AIR FILTER, ECONOMY CAPACITY, MERV 8, METAL MESH BACKING, PLEATED AIR FILTER	\$2.24000 USD / each Qty: 1 Add to Cart ★ My Favorite Items   Edit ∨
to add the item as a aid freudenberg (70) scotsman (32) viskon-aire (65) See More	a favorite.	BAG AIR FILTER, 12X24X15, 5 POCKET, MERV 11-A, Supplier: Capital Air Filters, Ioc. Supplier Part #: RV1112241505- REVOLUTION 12 <del>X24K15 M11-</del> A 5P Available in: <b>0</b> Day(s) Bid Number:	\$33.17000 USD / each Oty: 1 Add to Cart Add to Favorites

3. 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

Shop By Category –	All Categories 🗸 air filter	v Q
Search within results	2,896 item(s) found View:	Sort by: Relevance V
Keyword metal (1484) pleated (1456)	Add to Cart Compare Items	Viewing: 20 items v 1 2 3
synthetic (903) perfectpleat (729) self-supported (729) See More	Click 'Edit' to further organize a favorite item into	\$2.24000 USD / each           Qty:         1           Add to Cart
Category Industrial (36) Institutional Food (5)	a specific 'Folder' selected from the dropdown.	★ My Favorite Items Edit ✓ My Favorite Items ×
Miscellaneous (2855) Supplier Capital Air Fitters (2855)	To remove the favorite designation from an item, click the <b>'Remove'</b> button.	In Fotoec
Capital All Filters (2005) THOMPSON & LITTLE, (41) Manufacturer aaf flanders (1608)	Click the 'Remove' button.  Metal Mesh Backing, Pleated Air BAG AIR FILTER, 12X24X15, 5 POCKET, MERV 11-A,	Remove Done

4. 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 Purchase Requisition (PR) 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.

		Q 🔒 😗 😌 💦
Shop By Category –	All Categories paper towels	
Filter By Search within results Q Keyword fold (2) fold (2) fold (2) 0 (0)	Catalog Home 7 Save this search 5 item(s) four My Saved Searches Add te View All Search Options	Sort by: Relevance V
BADY (1) singlefold (1) See More Supplier   Clear BRAME SPECIALTY MERCO Biomedical Southeastern Paper (5)	Bid Number	Enter the search criteria and click the arrow to the right of the 'Search Bar' and click 'Save this search.'
	Apply	

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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Shop By Category –	All Categories V paper towels	✓	۹ 🖁 🗄 🖶
Filter By Search within results Q Keyword	Catalog Home ( paper towels search Save Search Sitem(s) foun My Saved Searches	Manage	Sort by: Relevance V
fold (2)     roll (2)     600' (1)     800' (1)     singlefold (1) See More	View All Search Options Bid Number	Accept the suggested search name or give it a custom name then click <b>'Save Search.'</b>	\$17.14000 USD / case           hty:         1

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

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Shop By Category –	All Catego	ories V paper towels		x 🤮 🗗 🌐
Filter By Search within results	Catalog Home /	Save this search My Saved Searches	Manage	Sort by: Relevance V
Keyword	Add to	paper towels search	Click the arrow to access 'My Saved	
<pre>roll (2) 600' (1) 800' (1) singlefold (1)</pre>		View All Search Options	Searches.' Click on a saved search display those specific search results.	\$17.14000 USD / case
See More		Bid Number		Add to Cart

## 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 Purchase Requisition (PR). 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.

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.



3. 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 PR by clicking on **'Close Punchout Catalog Shopping Session.'** 

NORTH CAROLIN #PROCUREMENT	A service subsection		
Forms & S	Supply, Inc-FSIoffice Catalog	Close Punchout Ca	atalog Shopping Session
		Home   Quick Order   Ink And Toner 👻   Favorites 👻   Contract. 👻   My Accounts 👻 Live Chat Offline	
	<b>Gell</b> office	CUSTOMER SERVICE: 1-800-532-0335	FS
	Office	What can we help you find today? Keyword or item # Q 💥 2 items : \$25.73	
		View Cart Submit Cart	
		Welcome Back, noas requester 00	
		er is done searching for their items on the	
	Office Supplies Supplier's put the items bac	nchout site, click 'Submit Cart' to send	
		Relevance 🗸	
		d not add any items, they can click	
		hout Catalog Shopping Session' to eProcurement.'	
	X Keyword: post it	3M (5) \$8.31 / Pack MMMR33012SSC	
	SEARCH BY CATEGORY	Post-tite Super Sticky Pop-up Notes - 1080 - 3" x 3" - Square - 90 Sheets per Pad - Unruled - Canary Yellow - Paper - Self-adhesive, Repositionable - 12 / Pack	
	Adhesive Note Pads (96)	Pop-up style notes for easy use     Keeps you organized     Qty	
	<ul> <li>Flags (35)</li> <li>Easel Pads (9)</li> </ul>	Quick View 🕢 Comments Add More	7
	Top Tab Accessories (7)	2 in cart	
	<ul> <li>Index Tabs &amp; Page Markers</li> <li>(7)</li> </ul>	☆	

4. 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 PR on the 'Summary' page if the user has already clicked 'Proceed to Checkout.'

<	HORTH CARDLINA HIROCURENEXT				9 🖶 🕐 🛞 💦
Sho	Click on the 'Description' of a	5	~	Search by pa	t #, supplier name, or keyword
Filte	punchout item to return to that	unchout"			PR11818856 ×
Se	punchout shopping session to edit existing items or add more		View:		Pentel EnerGel NV Liquid Gel Pens - Fine Pen 1 x \$9.11000 USD
Кеу	items from that supplier.				Post- itreg; Super Sticky Pop- up Notes - 1080 2 x \$8.31000 USD
	upplies (4) nachinery (3) roducts (3)	CORRECTION D-ITERPRISES	_	rrection Enterp ier: North Caroli	Review Cart Proceed to Checkout Lier
$ \subseteq $	pols (3)				Add to Favorite

## VI. Adding Non-Catalog Items

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).

1. 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.

NORTH CAROLINA extension					Q	<b>a</b> (?)	S NR
HOME PROCUREMENT	CATAL	DG		Re	cent 🗸	Manage 🗸	Create 🗸
Shop By Category		All Categories 🗸	Search by part #, supplier name, or key	word	✓ Q	<b>1</b>	([+]) =
Computers and IT equipment Machinery and Tools	>	Catalog Home			→ < ;	Add Nor	n-Catalog Item
Maintenance, Repair and Operations	>	Recently Viewe Clic	ck on either the <b>'Add Non-C</b>	Catalog			< >
Miscellaneous	>	Iter	m' link or the Non-Catalog in	con to			
Office Products	>		d an item to the PR.				
Raw Materials	>						
Services	>						
Uncategorized Items		24" Cab protector for platform		(DIST) UNIVERSAL TRI-		ory, Purchase,	SYSTEL,
	_	body	LaserJet 3x500-sheet	CHEMISTRY, SINGLE UNIT CHARGER (NTN1667), For		et 500-sheet	
Ohan Du		GODWIN MFG CO INC	SYSTEL BUSINESS EQUIPMENT CO	PR400/PR860/P	SYSTE	L BUSINESS E	QUIPMENT CO.
Shop By		\$217.00000 USD / each	\$1,140.05000 USD / each	Mobile Communications America	\$278.3	32000 USD /	each
Supplier	>			\$478.50000 USD / each			

- 2. The 'Create Non-Catalog Item' page will display for the user to enter non-catalog information.
- 3. **Full Description:** Enter a description of the item being purchased. Be sure to enter as much detail as necessary for the supplier to accurately fulfill the item (e.g., color, dimensions, etc).
- 4. 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.'
- 5. **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. 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.

Choose Value for Commodity Code          Name       ✓         Name       f         ✓       All Commodities         ✓       10- Live Plant and Animal Material and Accessories and Supplies         ✓       1010 - Live animals	Search for the appropriate ' <b>Commodity</b> <b>Code'</b> via UNSPSC, either by name or ID. To view the commodity code drop- down menu by header, click the arrow next to the category. The drop-down menu will expand to show the list of choices under the main header. Users must select a six-digit category.	Select Select
101015 - Livestock	101015	Select
101016 - Birds and fowl	101016	Select
101017 - Live fish	101017	Select

- 6. **Quantity:** Enter the appropriate Quantity.
- 7. 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.
- 8. **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.

- 9. **Amount:** This field is automatically calculated based on the information entered above.
- 10. **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.
- 11. Update Amount: Click this button to recalculate 'Amount' when changes are made to the item being added.
- 12. **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:
  - a. <u>Term Contract Statewide</u>: 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.** <u>Term Contract Agency Specific</u>: 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.** <u>Term Contract IT Convenience</u>: 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 spotbuy (nonrecurring) purchase. These items are not available via the catalogs.

**Note:** 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.

Create Non-Catalog Item	🖶 Print
If a 'Contract Type' of 'Term Contract Statewide' or 'Term Contract IT Convenience' is selected, an additional 'Statewide Contract ID' field will display with drop-down selector.	
Additional Pricing Details () Amount: \$25,00000 USD	FOB Code: * (EPLite) Destination Recycled Content Indicator: Yes No
Create Non-Catalog Item	🔂 Print
Full Description: * Sample non-catalog item If a 'Contract Type' of 'Term Contract Agency Specific' or 'Agency Contract' is selected, an additional 'Agency Contract ID' field will display with a free-text field.	Terms of Payment:     (no value)       Contract Type:     Term Contract Agency Specific v       Blanket Purchase Order?     Yes       Agency Contract ID:

13. 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.

FOB Code: \* (EPLite) Destination

Recycled Content Indicator: OYes No

- 14. **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.
- 15. 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.
- 16. FOB Code: This field defaults to '(EPLITE) Destination' for all orders.

Additional Pricing Details (i)

Amount: \$25,00000 USD

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

- 18. **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**.'
- 19. Location: Click on 'Select' if a different location for the supplier is preferred than the defaulted location once a supplier is selected.
- 20. **Supplier Part Number:** Enter the Supplier Part Number (if known). This will assist the vendor in shipping the correct item.
- 21. **Supplier Auxiliary Part Number:** Enter the Supplier Auxiliary Part Number (if known). This will additionally assist the vendor in shipping the correct item.
- 21. 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.

			<u> </u>
Create Non-Catalog I	tem		🛱 Plant Add to Cart Cancel
Full Description: *	Sample non-catalog item	Terms of Payment: Net 30 Days Contract Type: No Choice	4
Commodity Code: *	* 101015 - Livestock V	Blanket Purchase Order? Yes No	
Quantity:	1	Other Costs:	
Unit of Measure:	each V	Line Total of Tax and Other Costs:	
Price: *	* \$25.0000C USD ✓	FOB Code: * (EPLite) Destination	
	Additional Pricing Details (i)	Recycled Content Indicator: Yes No	
Amount:	\$25.00000 USD		
Tax Amount:		Fill in all applicable fields	
	Update Amount	and click 'Add to Cart' at	
Supplier Information		the top or the bottom of the screen to add the non- catalog item to the PR.	
Supplier:	Performance Livestock & Feed Co., Inc. 🗸		$\mathbf{X}$
Location:	Performance Livestock & Feed Co. [ select ]		
Terms of Payment:	Net 30 Days		$\mathbf{X}$
Supplier Part Number:			$\sim$
Supplier Auxiliary Part ID:			×
			Add to Cart Cancel

22. 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.

				٩	🖶 🕐 👻 💀
HOME	PROCUREMENT	CATALOG		Recent 🗸	Manage 🗸 🛛 Create 🗸
Shop By Ca	ategory	To add any additional non- catalog items, click the <b>'X'</b> and	by part #, supplier name, or keyword	✓ Q	😫 🗗 🖲
Computers a	nd IT equipment	continue shopping, or if all of	PR11818886		$\rightarrow$ (x)
Machinery an	nd Tools	the desired items are present,	Sample non- catalog item		1 x \$25.00000 USD
Maintenance	, Repair and Operatio	click 'Proceed to Checkout.'			
Miscellaneou	5	>		Review Cart	Proceed to Checkout
Office Produc	ts	>			·
Raw Material	5	>			
Services		>			

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

- 1. 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.
- 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 a PR 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 **'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.
- 5. The **'Buying Entity'** field will default to the buying entity that is selected in the user's 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.
- 6. 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.
- 7. GRAND TOTAL AMOUNT INCLUDING TAX AND OTHER COSTS: This field will not calculate.
- 8. **Legacy Document ID:** The identification number that the user will need to enter for the particular order. The number will be associated with the order throughout its existence. This is a required field.
- 9. 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.'

10. 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.

- 11. 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.
- 12. 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.
- 13. Attachments may be added to the PR at the header level by clicking the 'Add Attachment' link.



14. 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.

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.

		۹ 🖶	• ⑦	ER
Add Attachment				
File: Choose File No file chosen				
Visible to supplier on the purchase order	Select the checkbox besides 'Visible to supplier on the purchase order' to include attachments on the			
	purchase order.	ОК	Ca	ncel

15. 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 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.

	Attachments				=
	File Name 🕇	Size	Creator	Visible to Supplier on Order	
	Sample Attachment.docx Download	14.4 KB	Eplite Requester	$\langle \overline{\checkmark} \rangle$	Delete
(	Add Attachment				

16. 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).

File Name 1	Size C	Creator	Visible to Sup	plier on Order					
Sample Attachment.docx Download	14.4 KB N	ICAS Requester	G	/		Delete			
Add Attachment									
Approval Flow	4		ente <b>'Sho</b>	e all requir red in the l ow <b>Approv</b> em genera	PR, the u v <b>al Flow'</b>	user can cl button to	ick the		
			3930	on gonora					
▼ Line Items			Jyst						Show Details
Line Items				t Price	Discount	Net Amount	Charges	Taxes	Show Details Amount
Line Items      Items Total      No. † Type Description	l paper dividers, 5,000 pi	er		t Price	Discount		Charges		

- 17. 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.
- 18. 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.'

**Note:** Users can add additional fields to this view by clicking the '**Table Options Menu**' icon in the topright. 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.



19. 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.



20. 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.

2 Items Total					Show De	tails 🖬
No. † Type Description		Qty Unit	Price	Amount		
1 🕑 4" Patty Press waxed paper dividers, 5,000 pe		1 case	\$55.68000 USD	\$55.68000 USD		
2 9 5° Patty Press waxed paper dividers, 5,000 pe		1 case	\$61.44000 USD	\$61.44000 USD		
L Actions V More V I Import Acco	unting Update Total					
Edit Delete	Click 'Edit' in the 'Acti to edit all selected line					
			Continue Shopping	Delete	Save	Submit

21. 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.

- 22. Scroll down the page to the 'Accounting by Line Item' section, where the user will find the following three fields.
- 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. **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**.'
- 25. Tax Rate: Defaults to the value set by the entity but can be changed using the dropdown menu.
- 26. 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.
- 27. 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.
- 28. 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.

Accounting - by Line Item							
Bill To: * Town of Jamesville	~						
Item Classification: Good							
Tax Rate: 6.75%	6.75%						
Shipping - by Line Item							
Ship To: * Town of Jamesville To	own Hall 🗸						
Deliver To: * requester							
Comments - by Line Item	Do NOT add ' <b>Comments'</b> or	]					
Add Comment	<b>'Attachments'</b> at the line item level. Only do this on the <b>'Summary'</b> page.						
Attachments - by Line Item	When all edits have been completed,						
Add Attachment	click the <b>'OK'</b> button to lock them in and return to the <b>'Summary'</b> page.						
		(Cancel					

- 29. 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.'
- 30. Since all requisite information has been entered for all line items, the **'Approval Flow'** is now visible above the **'Line Items'** section.

▼ Approval Flow							
Submitted Pending Approved							
▼ Line Items	Users can add manual approvers by clicking						
<sup>2 Items To</sup> Users should ignore the 'More' and 'Import Accounting'	the arrows between existing approvers.						
□ <sup>№</sup> buttons but can click <b>'Update</b>	Qty Unit	Price	Amount				
<b>Total'</b> if there is a need to recalculate the <b>'Amount.'</b>	1 case	\$55.68000 USD	\$55.68000 USD				
2 😢 5" Patty Press waxed paper dividers, 5,500 per	1 case	\$61.44000 USD	\$61.44000 USD				
↓     Actions ∨     More ∨     Import Accounting ()     Update Total							

31. 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.

Note: 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.'

- 32. 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.
- 33. 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.

				Q 🖶	o 😵 N
PR11819092: Sample Expert View PR		Print	Continue Shopping	Delete Save	Submit
Summary		1			
Title:	* Sample Expert View PR			Cart Summary	
Entity:	JVIL - Town of Jamesville	Click 'Print' to see the		THOMPSON & LITT (2)	\$117.12000 USD
On Behalf Of:	NonInt Requester	printed version of the PR		Total (2 items)	\$117.12000 USD
Suppress Order:	i	and click 'Submit' to send			
FOB Code:	* (EPLite) Destination	the PR off for approval.	~	Check	
GRAND TOTAL AMOUNT INCLUDING TAX AND OTHER COSTS:			1		