

Creating Requisitions: Guided Buying

Introduction

This process guide provides instruction on the functional steps to create a Requisition (RQ) in the Guided Buying view of NC eProcurement. An RQ is a request to buy goods or services that is created electronically. Users can add items from Statewide Term Contract (STC) using the catalogs and Punchout catalogs or request an item(s) that is not on STC, which is called a non-catalog item.



Learning Objectives

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



Add Catalog items to a requisition in Guided Buying.



Add Non-Catalog items to a requisition in Guided Buying.



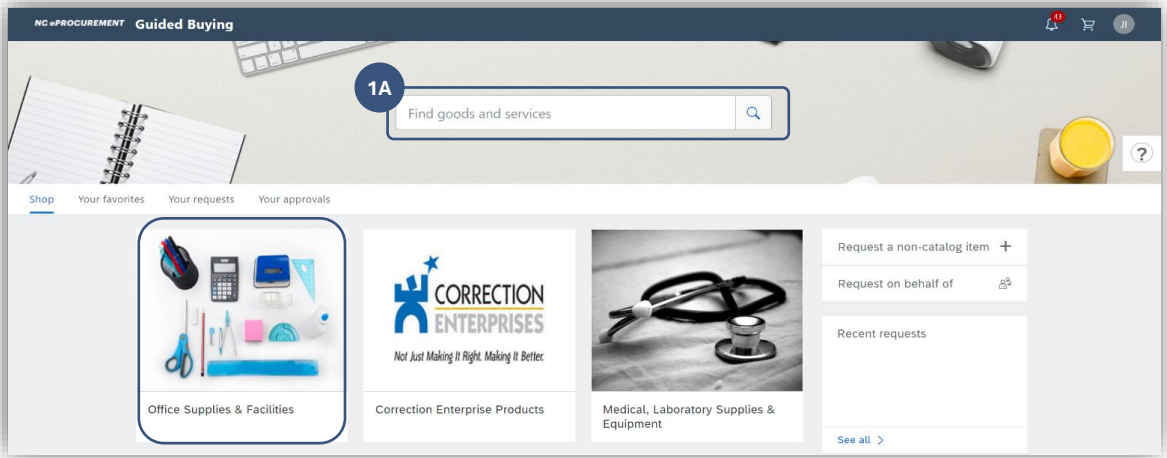
Submit a requisition in Guided Buying.

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Adding Catalog Items

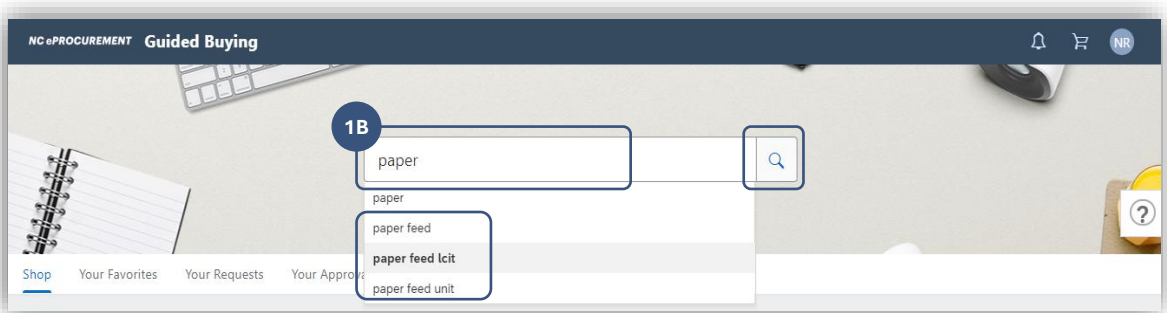
1 If an item appears in the NC eProcurement catalogs, it is on a Statewide Term Contract (STC) negotiated on behalf of the State of North Carolina's buyers by the Division of Purchase & Contract (P&C). Users may add catalog items to their RQ by utilizing the catalog search functionality.

A. There is no need to initiate an RQ in Guided Buying; users just need to search for the item(s) being purchased and add them to the shopping cart. Catalog items can be searched for by using the **Search Bar** or **Tiles**.



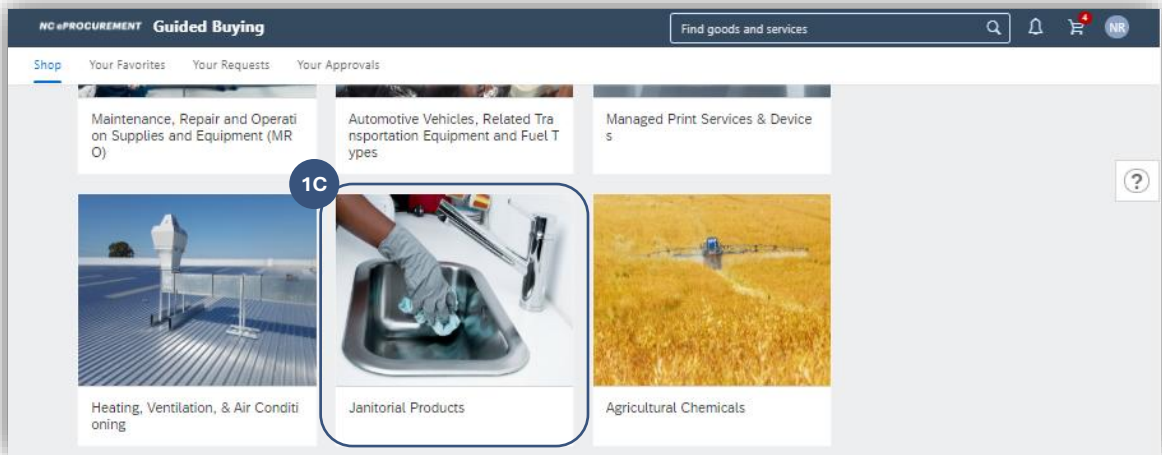
B. If using the **Search Bar**, enter the desired search criteria (i.e., **Keyword, Supplier Part #, Manufacturer, Statewide Contract ID, or Category**) and click the magnifying glass or press **Enter**.

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.

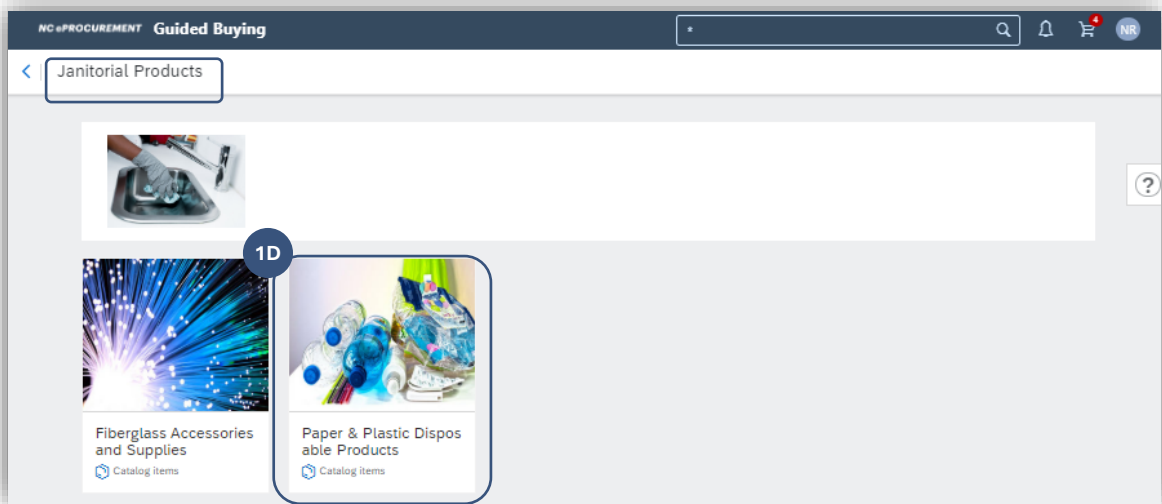


C. If beginning a search via **Tiles**, click on the **Tile** that best represents the type of item desired.

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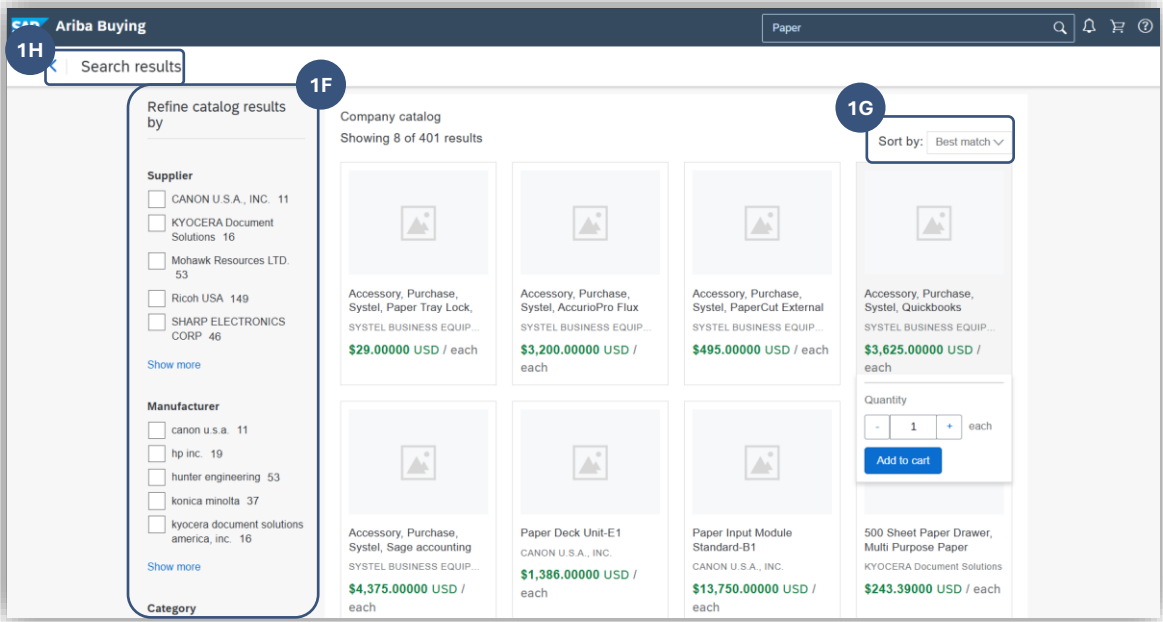


- D. A sub-screen will appear with additional, more-specific **Tiles** to direct the purchase. Click on the one that, again, best represents the type of item desired.



- E. After conducting the search, the results page will be displayed. It will provide further options for refining the search and evaluating the results.
- F. The **Refine Results** panel on the left will provide options to allow users to refine results. Those options will automatically appear and are dependent on the search results. Select an option from this menu to see only those results matching the specified criteria. The possible fields include **Supplier**, **Manufacturer**, **Keyword**, or **Price**, and the subsequent number displays the amount of options that will display if the box next to the suggestion is checked.
- G. Clicking the drop-down next to **Sort By** allows users to sort the search results based on **Best match**, **Price - highest to lowest**, or **Price - lowest to highest**.
- **Best match** places the items with the best or most complete match near the top.
 - **Price highest to lowest** places the most expensive items closer to the top.
 - **Price lowest to highest** places the least expensive items closer to the top.
- H. Click the blue left-arrow next to **Search Results** to return to the previous page of results or click on **NC eProcurement** in the top left of the screen to reset the search results altogether.
- I. A maximum of eight catalog items will display on the results page. To unveil more results, click on **More** beneath the last result.

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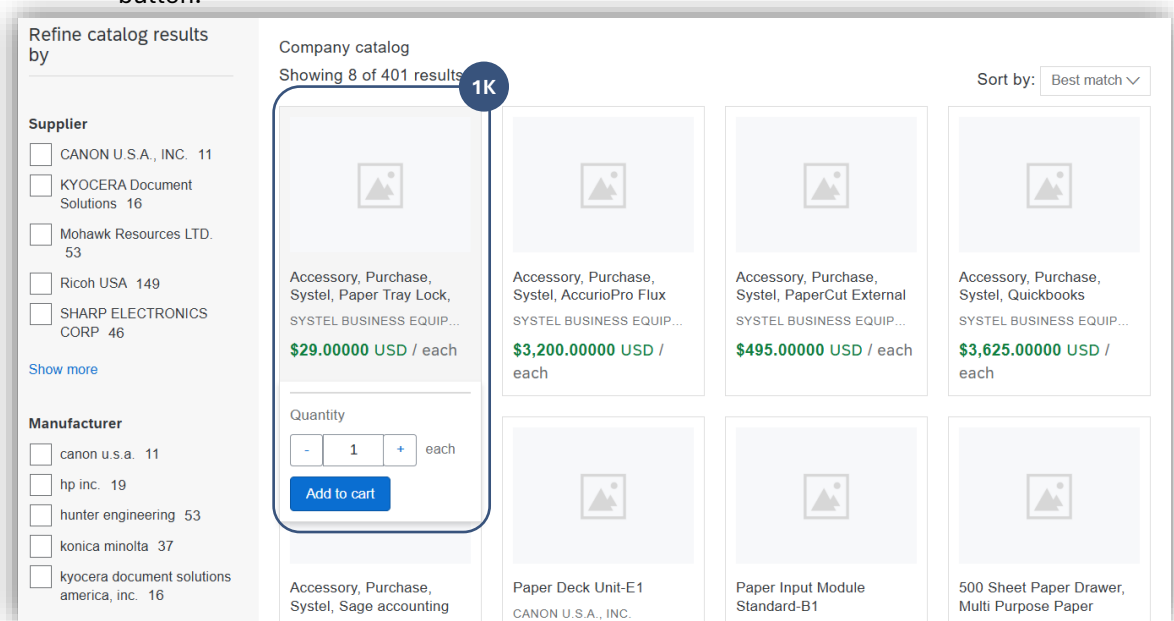


J. Each catalog item on the results page will provide a description of the item, the supplier of the item, the price of the item, and the unit of measure for the item.



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

K. If the user hovers their cursor over a catalog item, it will be surrounded by an expanded blue rectangle with an option to select the quantity desired and click the **Add to cart** button.



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L. For more information about the item, click on it to display a detailed view.

MEDICINE CUP, PA®, 1OZ, POLYPROPYLENE, METRIC
From Medical Solutions, Inc.
MEDICINE CUP, PA®, 1OZ, POLYPROPYLENE, METRIC ONLY., 100/SL, 50SL/CS

\$0.83 USD / slipsheet

Available immediately

Quantity: slipsheet

[Add to cart](#) [☆ Add to favorites](#)

Product information

Supplier part no.:	ADV-P250550
Manufacturer:	PRO ADVANTAGE
Manufacturer Part #:	P250550
Available in:	0 days
Bid Number:	201700454
Contract Type:	T
Statewide Contract ID:	475A
Information from Supplier:	https://medicalsolutionsinc.com/
Information from Manufacturer:	http://www.proadvantagebyndc.com/

M. 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.

420A - Academia Furniture. Please navigate to the
From Academia Furniture

\$0.00000 USD / each

Available immediately

Quantity: each

[Add to cart](#) [Add to favorites](#)

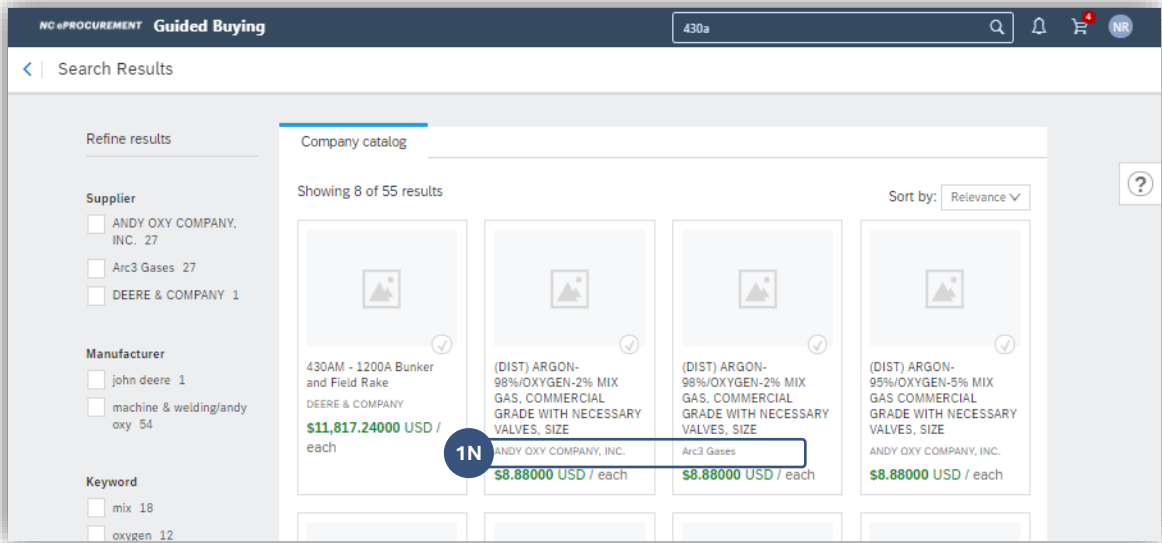
Specification

Supplier Part #:	420A - Academia Furniture
Available in:	0 Day(s)

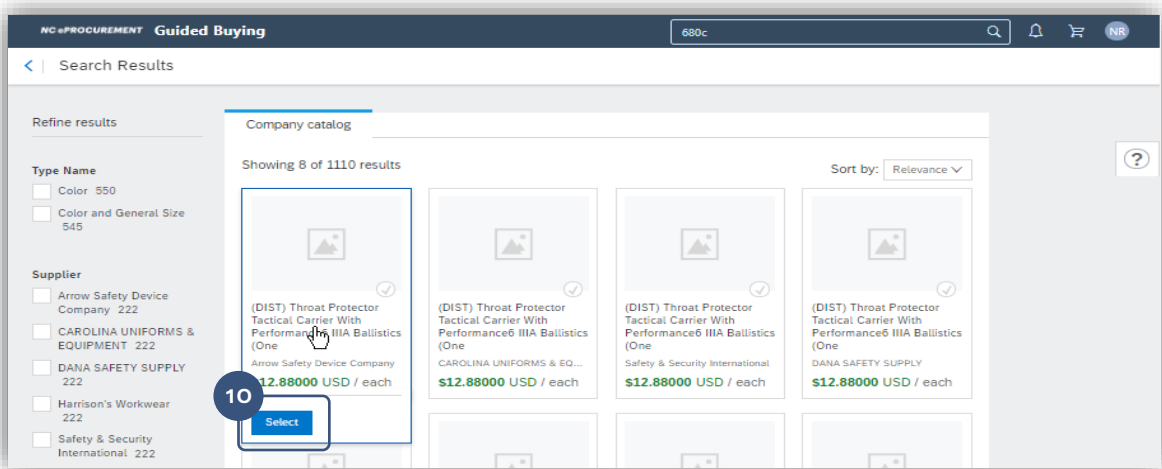
1M 420A - Academia Furniture. Please navigate to the Contract Summary page on the DOA Purchase and Contract website to access the 'STC 420A Award Information' link for pricing, discount, & distributor information. To order from this contract, please create a Non-Catalog Item referencing Statewide Term Contract 420A and issue to an authorized distributor.

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- N. 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.

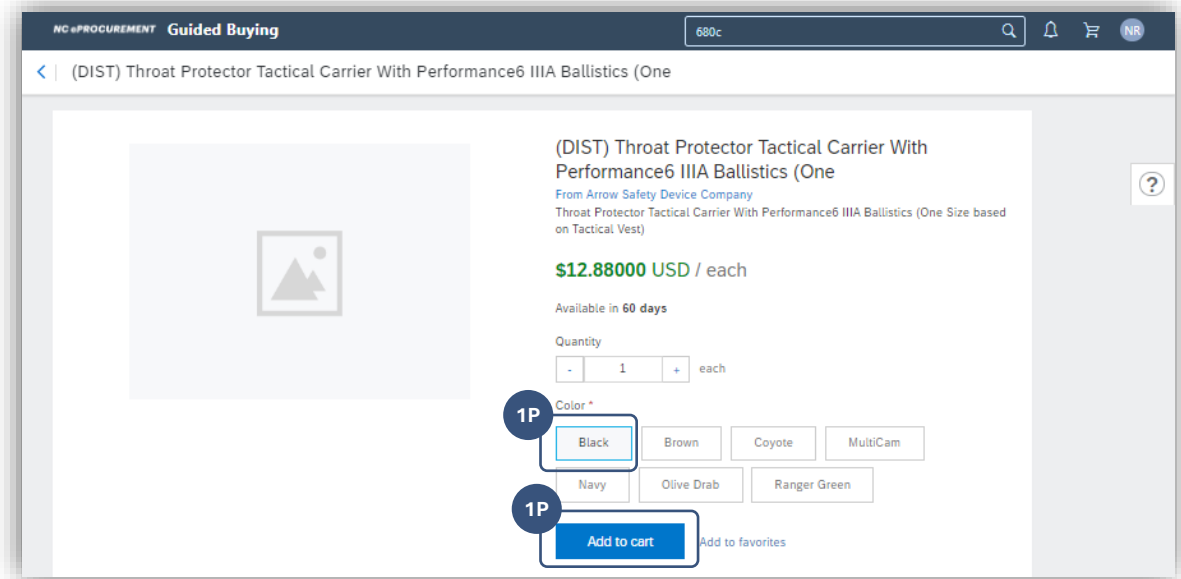


- O. Enumerations are STC items that have specific attributes associated with them and that require the user to select a preferred option before the item is added to the Requisition (e.g., size, color, delivery options). When an Enumeration item is returned in a search, the user will not have the option to **Add to cart**, but rather to **Select**. On the subsequent item details page, the system will display the options for the user to choose. The user will need to select the preferred option before clicking **Add to cart**.

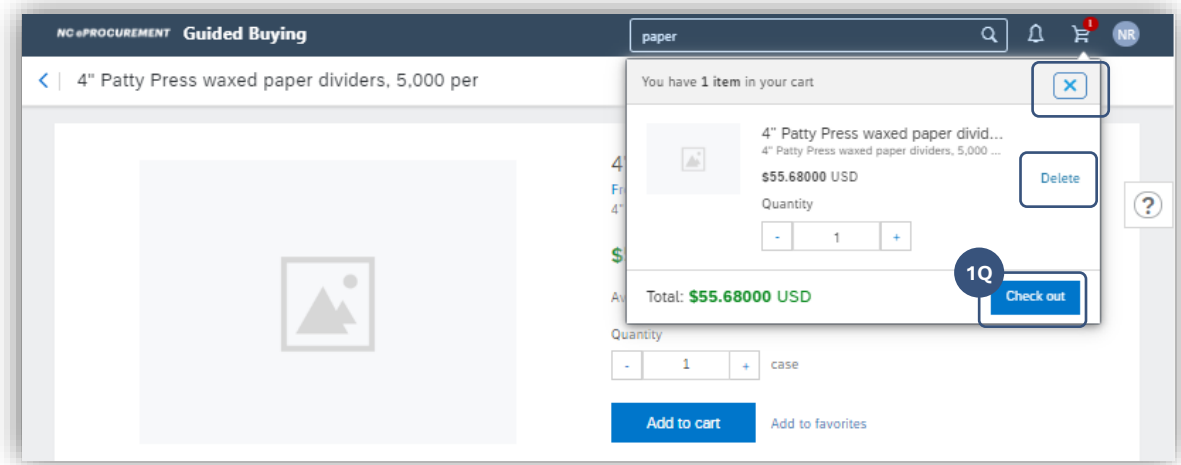


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P. Within the detailed view, select the preferred option (in this case **Color**). A blue border will surround the selection. The user can now click **Add to cart** without receiving an error message.



Q. If a user finds the desired item and clicks **Add to cart** (from either the results page or the detailed view), a red 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 **Check out** and complete the purchase if that is the only item intended for inclusion on this RQ, or the user can click the **X** to continue shopping for another item on this particular STC, or click **Delete** if the item was added in error.

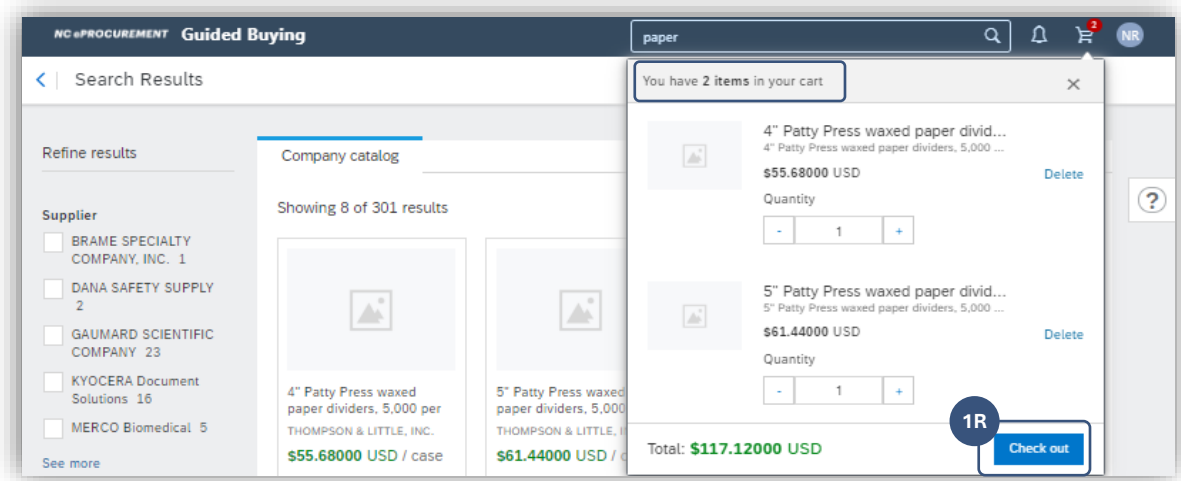


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R. If multiple items are added to the cart, it will be reflected in the red bubble above the shopping cart icon and in the drop-down box. By clicking **Check out** at this point, all items listed will be added to the RQ.



- If the user does not click **Check out** at this point, the items will remain in the cart until they are either deleted or the user clicks **Check out** at a later time.
- 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.



Adding Catalog Item Favorites

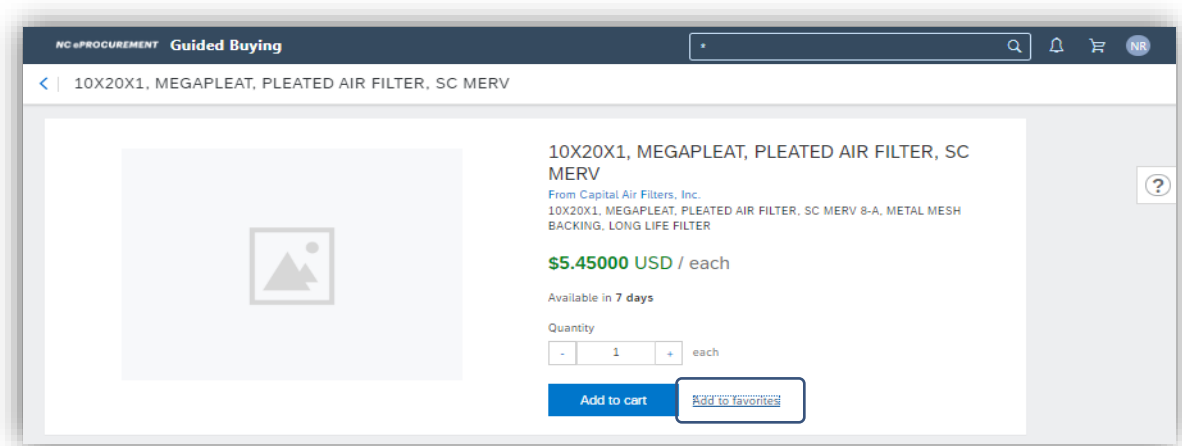
- 2 Users may add specific Statewide Term Contract (STC) items to a favorites list for quick reference. Catalog items saved as favorites are updated as the catalog item is updated (e.g., price, description). To utilize catalog Favorites, users must first define **Favorites Lists**. Specific catalog items can then be added to a defined Favorites List.



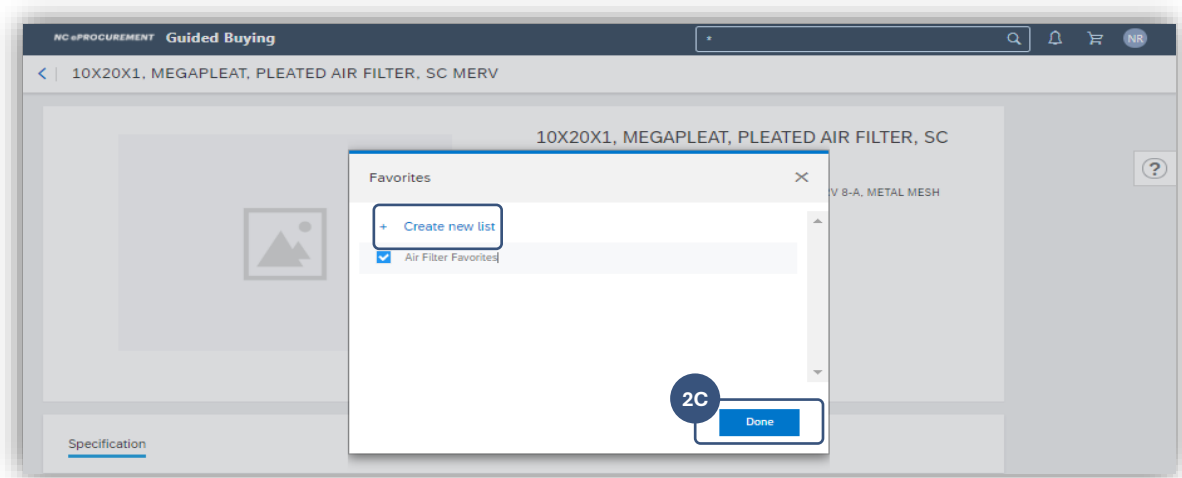
Favorite Items from Expert View do not carry over into Guided Buying and vice versa.

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- A. To define a **Favorites List**, execute a catalog search for the desired item.
- B. Click the **Add to Favorites** link.

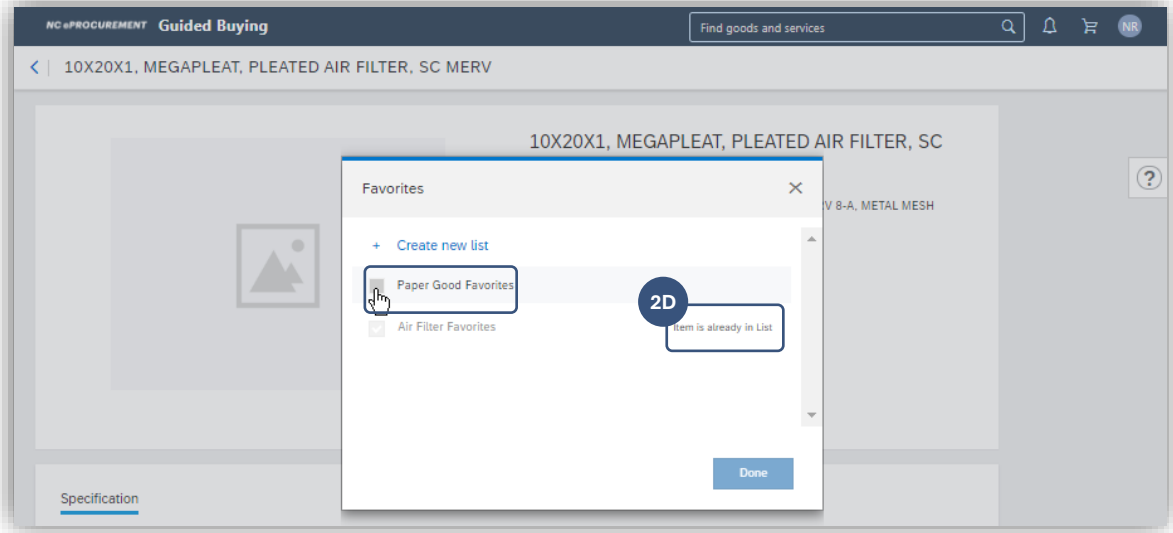


- C. The **Favorites** popup will display. Click **Create new list**, type the name of the list, and click **Done**. The item will be added to that list.

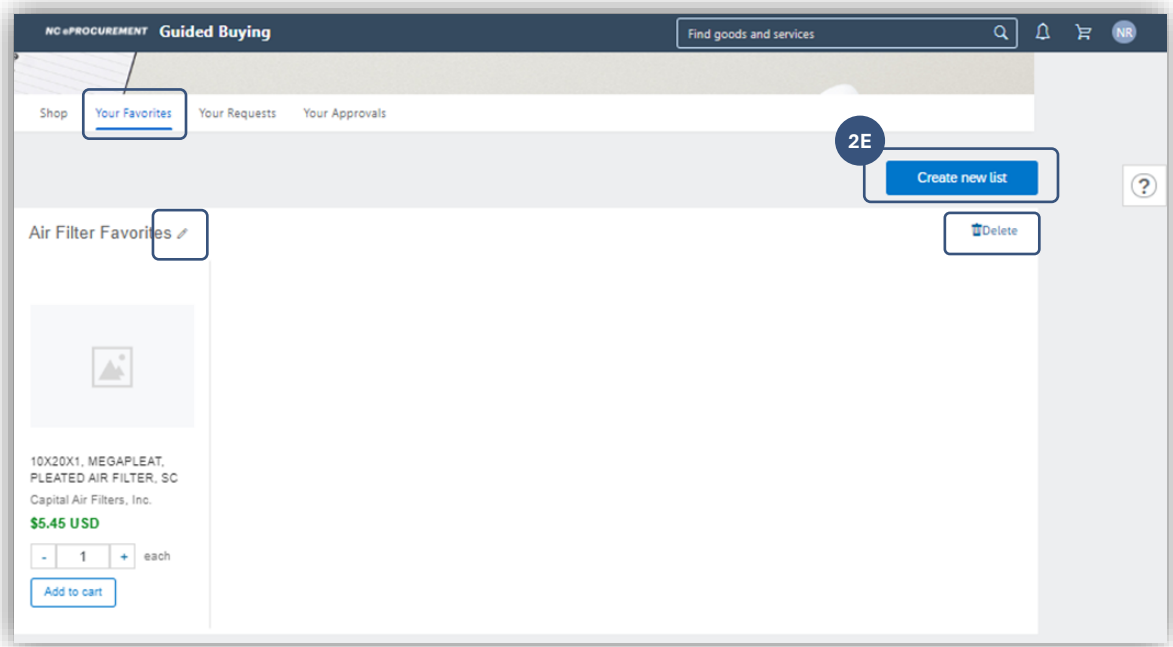


- D. The same item may be added to multiple lists by checking the box next to each list and clicking the **Done** button. If the item already exists in a list, the user will receive a notification that the **Item is already in List** and that list will be unable to select.

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E. Users can manage their **Favorites Lists** by clicking on **Your Favorites** near the top of the page. New lists can be added from this page by clicking **Create new list**, the names of existing lists can be edited by clicking the pencil icon, or lists can be permanently deleted by clicking on **Delete** in the top right of each list.



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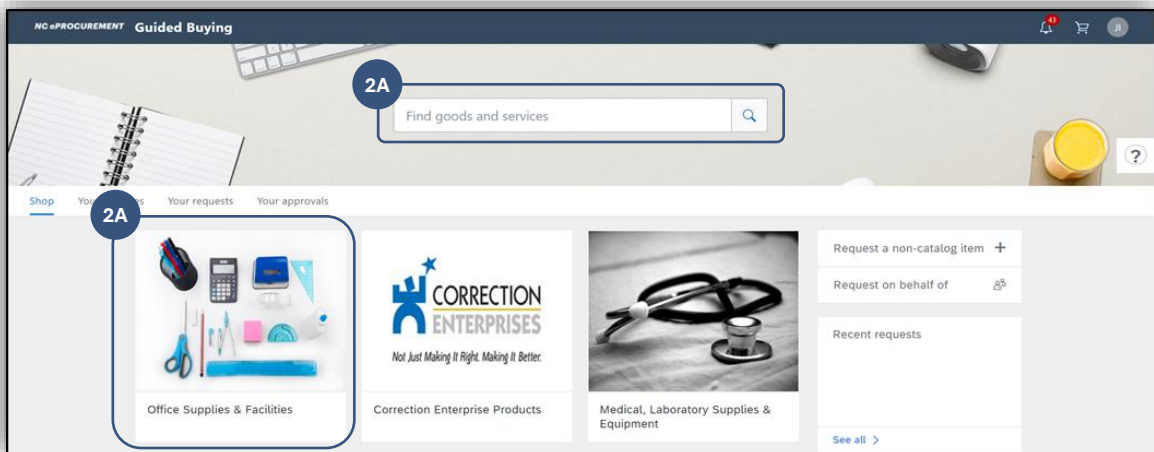
- F. Add an item from a **Favorites List** to the cart by clicking **Add to cart**, or delete the item from the list by clicking the **X** in the top right corner of the item. A confirmation screen will appear asking the user if they are sure they wish to remove the item from the list, to which they can click **Yes** or **Cancel**.



Adding Punchout Catalog Items

- 3 Some State of North Carolina Statewide Term Contract (STC) suppliers have created punchout websites containing negotiated term contract items. These punchout sites are accessible through the NC eProcurement term contract catalogs. A punchout site is a website created and maintained by the supplier specifically for the State of North Carolina. Users do not need to enter a new user ID or password to enter the suppliers punchout site. The 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.

- A. There is no need to initiate a punchout catalog purchase in Guided Buying; users just need to search for the item(s) they would like to buy and add them to their shopping cart. Catalog items can be searched for by using the **Search Bar** or **Tiles**.



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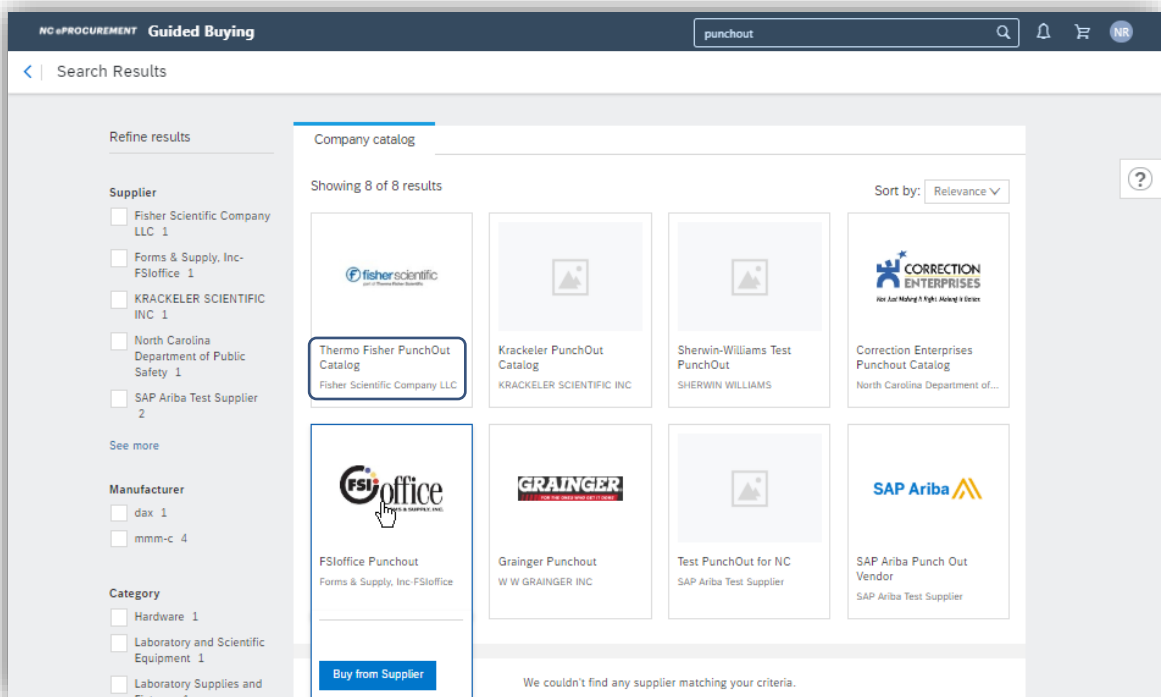
B. If using the **Search Bar**, users can enter the desired search criteria and click the magnifying glass or press **Enter**.



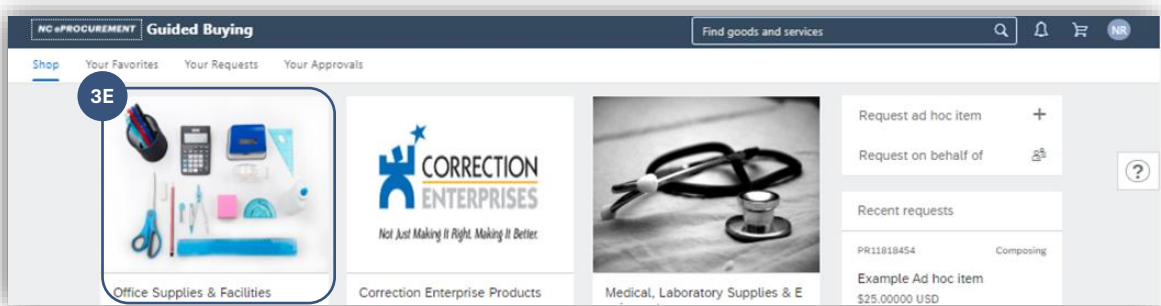
Searches by **Category** (ex: Office Supplies), **Supplier** (ex: FSI), or **Statewide Contract ID** (ex: 615A) will return results that may lead the user to a punchout catalog. Alternatively, if the user enters the keyword **Punchout** in the **Search Bar**, the only results returned will be links to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

C. Punchout catalog results will not show individual items with prices like standard catalog items. A tile with the suppliers name followed by **PunchOut Catalog** will display for every available punchout catalog.

D. If the user hovers their cursor over the punchout catalog tile they wish to purchase from, it will be surrounded by an expanded blue rectangle and an option to click **Buy from Supplier** which will take the user to the suppliers punchout catalog.

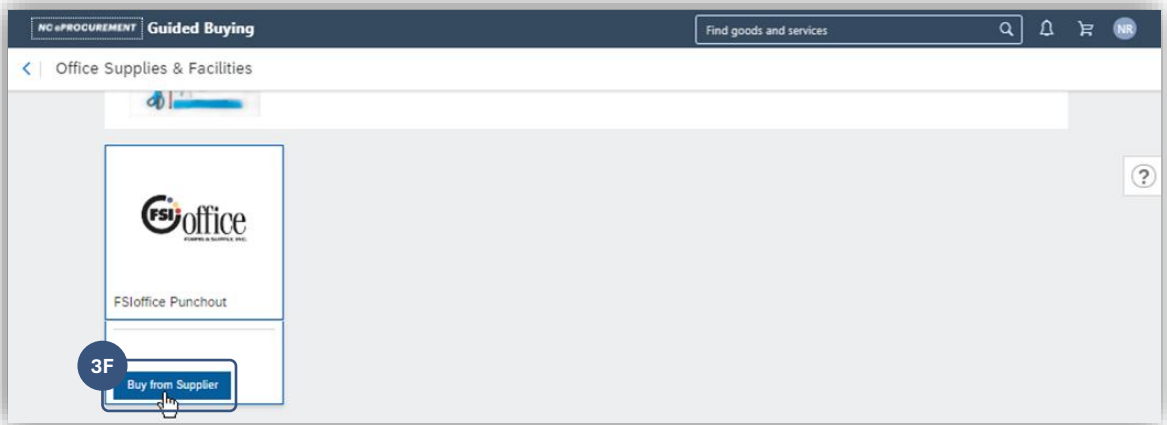


E. If beginning a search via **Tiles**, click on the **Tile** that best represents the type of item desired.



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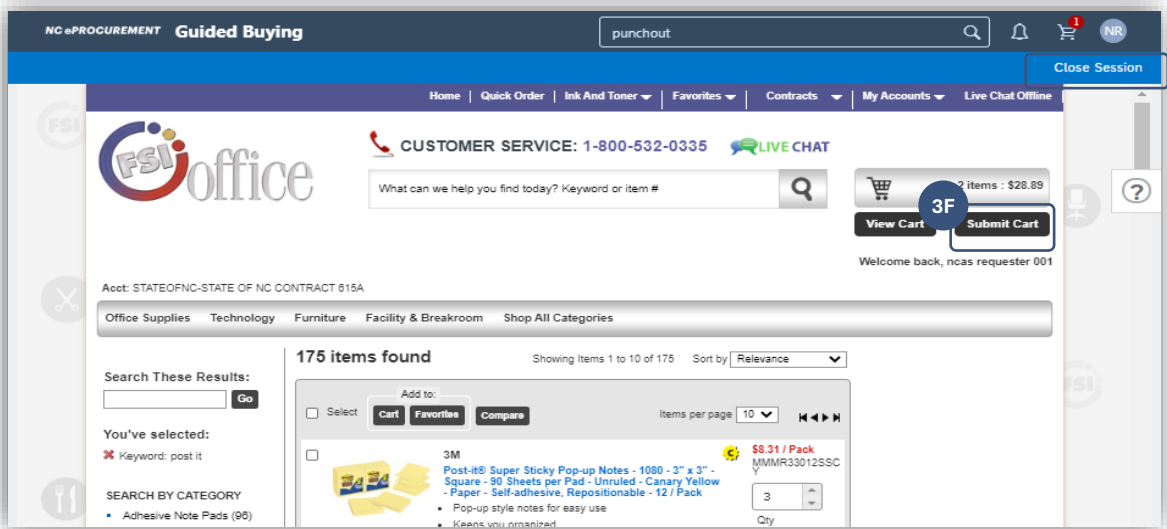
- F. A sub-screen will appear with additional, more-specific **Tiles** to direct the purchase. If a punchout tile appears, hover the cursor above the tile and click **Buy from Supplier** to be taken to that suppliers punchout catalog.



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

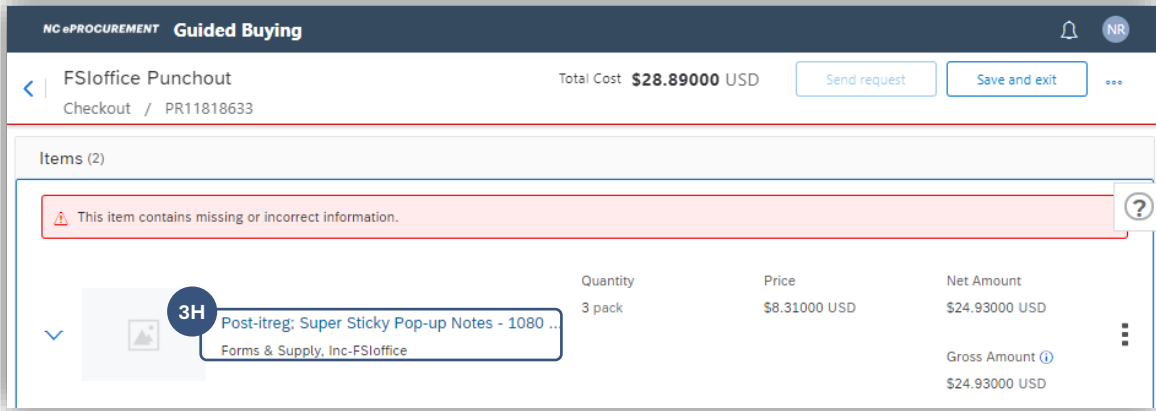


If a buyer decides to end a punchout shopping session before any items are selected, they may return to the RQ by clicking on **Close Session**.



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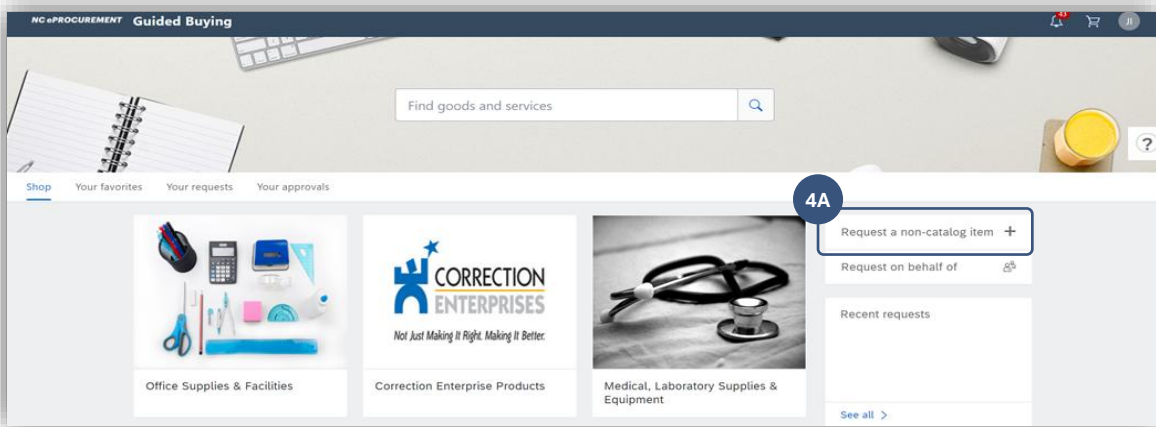
- H. Once the punchout item(s) have been added to the RQ, if there is a need to edit the quantity of the item or to add additional punchout items from that catalog, the user will have to make those edits back on the suppliers punchout catalog site and re-submit their cart. To access the site directly from the RQ, click on the **Description** of any of the line items.



Adding Non-Catalog Items

- 4 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).

- A. From the Guided Buying home page, click on **Request non-catalog item** to enter product information on the subsequent **Non-catalog request** page.

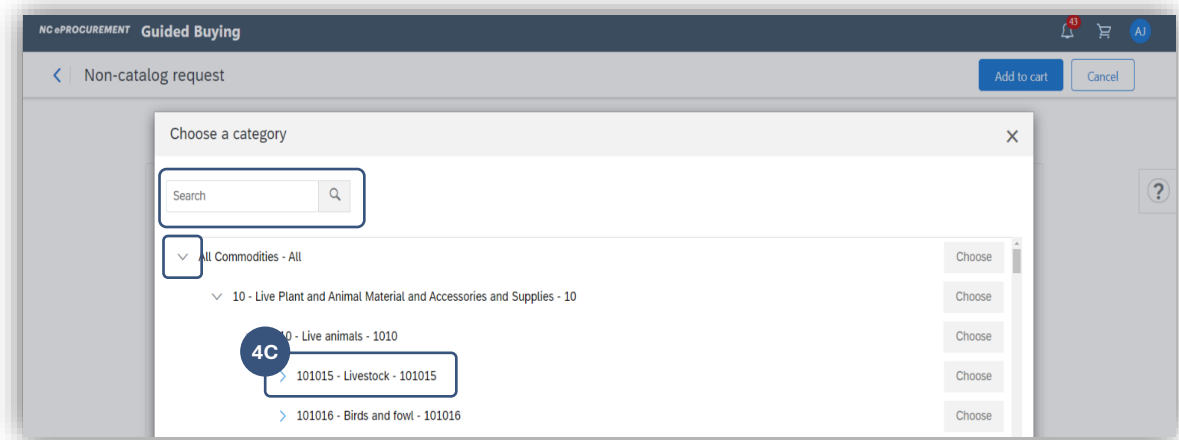


- B. **Product name:** Enter a name for the item being requested.
- C. **Category:** Locate the appropriate category that describes the item being purchased by using the drop-down menu. **Category** at this point translates to what is commonly referred to as a **Commodity Code**. If a desired category is not listed in the drop-down menu, select **Browse all** to search for the appropriate code. Users may search by category number or keyword.

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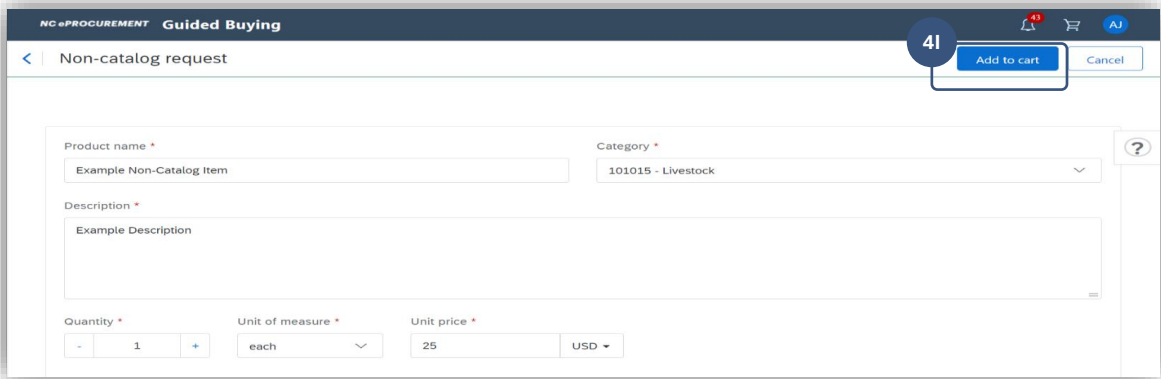


- It is important to select the appropriate **Category** as the State of North Carolina uses this for reporting purposes. The codes listed are part of the United Nations Standard Products and Services (UNSPSC) commodity code structure. Codes that begin with a 7, 8, or 9 describe service type categories. These codes should not be used when purchasing goods.
- It is required that users enter a category out to the sixth digit. Adding a two or four -digit code will not be prohibited when selecting, but the user will receive an error on the **Checkout** page if the selection does not have six digits.
- Please see the **Selecting a UNSPSC Commodity Code** job aid for further instructions.

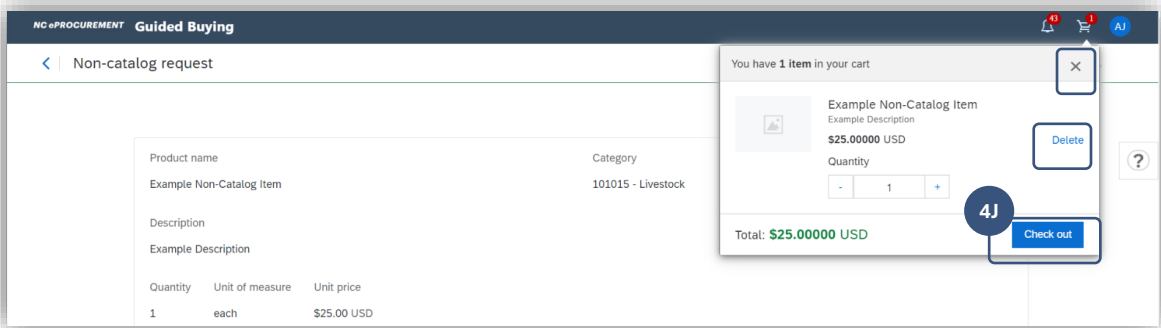


- D. Description:** Enter a description of the item being purchased. Be sure to enter as much detail as necessary for the supplier to accurately fulfill the item (e.g., color, dimensions, etc).
- E. Quantity:** Enter the appropriate Quantity. Add or subtract from the quantity by using the + or - buttons to either side of the free-text field.
- F. 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 **Browse all** to find the appropriate value.
- G. Unit Price:** Enter the price of the item in USD.
- H. Supplier:** Locate the supplier from the selector by clicking **View all suppliers**. The **Choose a supplier** popup will display. Suppliers will be organized by ascending **Supplier ID** number, or the user can enter part of the suppliers **Name**, **Address**, **City**, **State**, or **Country** in the search bar to return filtered results. Click the **Choose** button for the desired supplier to add them to the RQ.
- I.** When all required fields are complete, the user can click the **Add to cart** button. If a field is incorrect or incomplete, it will be outlined in red and accompanied by an error message until its corrected.

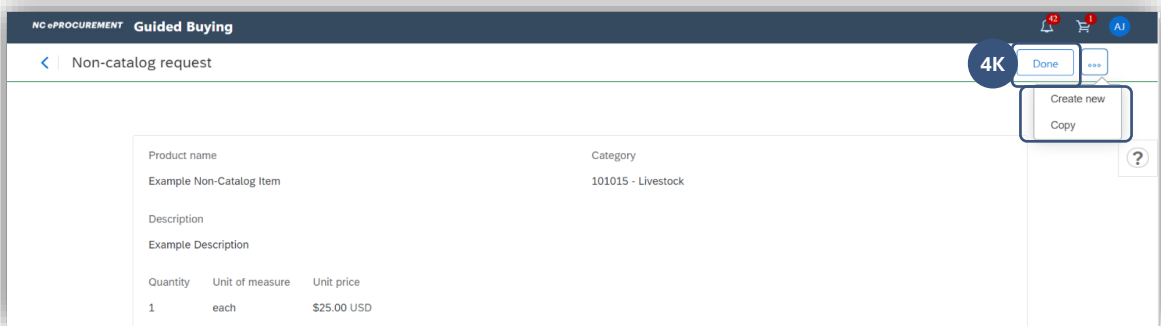
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J. An item will appear in the shopping cart icon, and the drop-down will allow the user to click the **X** in order to continue shopping, click **Delete** to remove the item from the cart, or click **Check out** to go to the **Checkout** page for that item.



K. If the user clicks the **X**, it will reveal two options in the top right of the screen. Clicking **Done** will take the user back to the Guided Buying home page and the item will remain in the cart. Clicking the three dots will display a drop-down option to **Create new**, allowing the user to add an additional **Non-catalog item** to the cart, or **Copy** the line as an additional **Non-catalog item**.



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Selecting Unit of Measure for Non-Catalog Items

- 5 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, a **UOM Warning** message will display in the **Others** subsection until they are properly aligned.



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
Service	YES	YES	NO
Good	YES	YES	YES



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**.
- 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.

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Checkout Page

6

The **Checkout** page allows the user to enter or update the details required to finalize the Requisition (RQ) before it is sent for approval. It displays once the user has clicked the **Check out** button in the shopping cart dropdown. Some fields are required while others are optional. Required fields with missing or incorrect information will be highlighted by a red border and an error message.

- A. The top of the **Checkout** page will display a **Title** that is defaulted to the first 25 characters in the description of the first line item on the RQ (in the case below **4" Patty Press waxed paper**). This **Title** can be edited by moving the cursor to it and overwriting the default. It is highly encouraged to change this **Title** to something descriptive of the items being purchased to make the RQ easily identifiable.
- B. Below the **Title** the user will find the **RQ number**, a unique identifier beginning with **RQ** that is automatically generated by the system.
- C. To the right of the screen, the **Submit** button (the button that passes the RQ along for approval) will be grayed out and unable to be clicked until all required fields are completed in an adequate fashion.
- D. **Save and exit** can be clicked if the user is not ready to click **Send request** but wants to keep the information they've already entered to complete later.

The screenshot shows the SAP Ariba Buying Checkout page. At the top, the requisition title is "4\" Patty Press Waxed Paper" and the RQ number is "PR3471". There are "Submit" and "Save and exit" buttons. Below this, there are sections for "Ship to" (1105 Kelly Drive, Sanford, NC 27330, United States), "Charge to" (Item Classification (Good)), and "Total cost" (\$1,000.00000 USD). There are "Manage locations" and "Manage details" links. A "6D" callout points to the "Save and exit" button.

- E. Below the top line are sections for **Ship to**, **Charge to**, and **Total Cost**. Clicking on **Manage locations** will allow the user to **Mass Edit** shipping information if there are multiple line items on the RQ, and clicking **Manage details** will allow for a **Mass Edit** of accounting information.

This screenshot is identical to the previous one, but with callouts "6E" pointing to the "Manage locations" and "Manage details" links.

- F. The Advanced options section below the area with **Total Cost** defaults to the expanded view, and a red border surrounds the **Deliver To** field directing the user to set a value. This free-text field indicates the recipient of the order and can be populated with any value, most commonly with the requesters name. This field can be defaulted in the user's profile so that it is automatically filled, in which case, the red border will not display.
- G. The **Need-by Date** field is transmitted on the RQ 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.

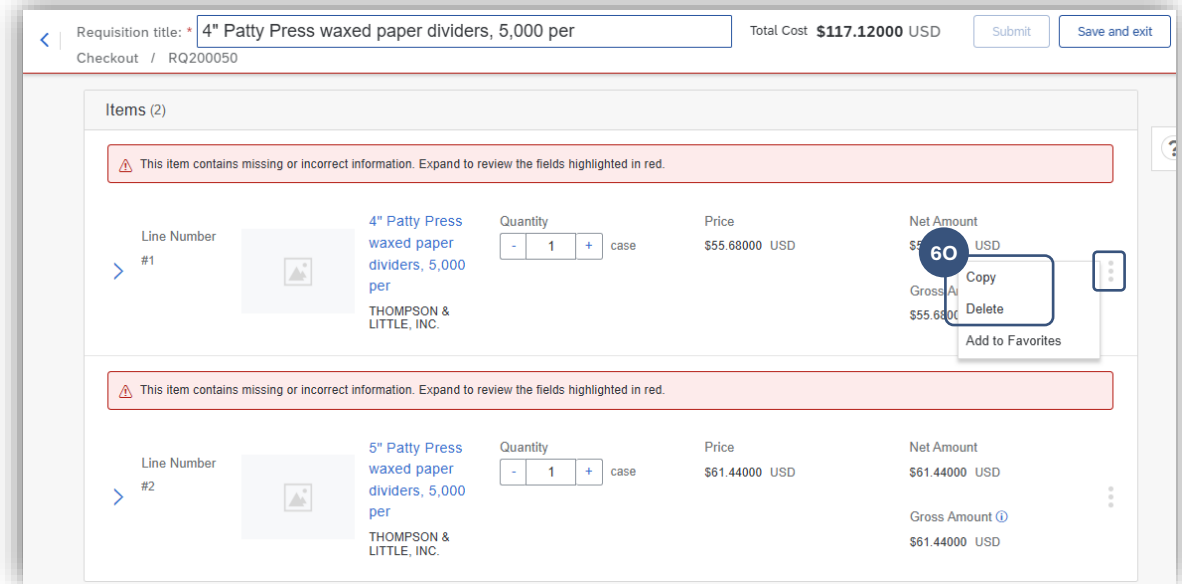
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- H. The **Ship To** field automatically defaults to the ship to location set up in the users profile. Users may choose a different option by selecting **Browse all** from the drop-down menu.
- I. **Entity** defaults to the user's entity and can't be changed.
- J. The **On Behalf Of** field will default to the requesters name, but the field can be edited by clicking the drop-down arrow and clicking **Browse all** to search for and select another user on whose behalf the RQ will be created. Additionally, the requester could have selected the **Request on behalf of** button on the Guided Buying home page to initiate the RQ on behalf of another user from the start.
- K. The **Delay Purchase Until** field, allows the RQ to be submitted and approved but not be distributed to the supplier until the date specified.
- L. The **Suppress Order** field defaults to **No**, meaning that the purchase order, when created, will NOT BE SUPPRESSED and will be sent to the supplier. If the selection is switched to **Yes**, the supplier will not receive a copy of the purchase order.
- M. In order to minimize the expanded view of the Advanced options section, click on the **Hide advanced options** text at the bottom of the section.

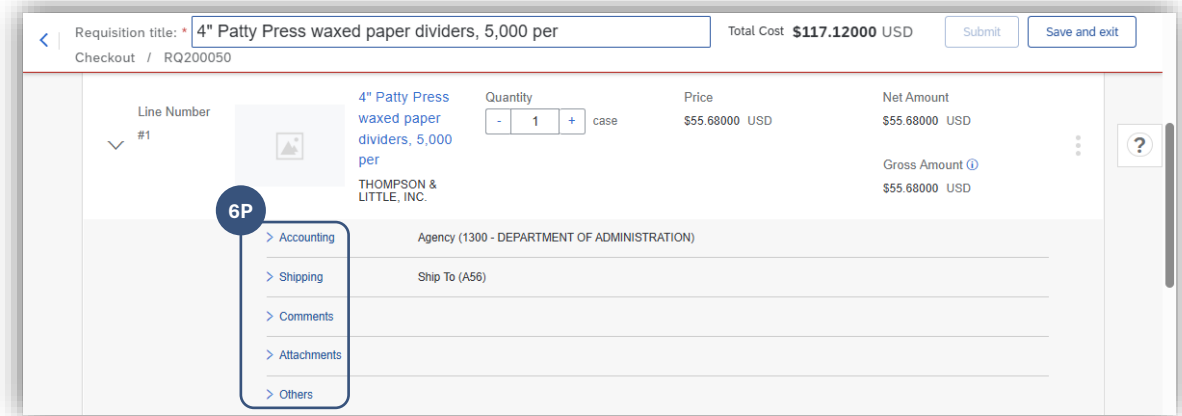
The screenshot shows a web form for creating a requisition. It includes several fields: 'Need-by Date', 'Ship To' (with a dropdown menu), 'Entity' (13 - Department of Administration), 'Delay Purchase Until', 'Buying Entity' (13EG), and 'FOB Code'. There are also 'On Behalf Of' and 'Suppress Order' sections with radio buttons for 'Yes' and 'No'. A 'Pass to Budget Officer' section is also present. Callout 6F points to the 'Deliver To' field, which has a red border and a warning message 'Deliver To must be set.' Callout 6L points to the 'Suppress Order' radio buttons, where 'No' is selected. Callout 6M points to the 'Hide advanced options' text at the bottom of the form.

- N. Below the Advanced options section, the line item(s) will display. If there are fields that need to be completed, a red notification will indicate at the top of each line item that there is missing or incorrect information. The user should click the arrow to the left of the item image to expand the line item details to review and update.
- O. By clicking the three dots to the right of the line item, users will be presented with certain options depending on the type of line item. Standard catalog items will display **Copy**, **Delete**, or **Add to Favorites**. Punchout catalog items will only have the option for **Delete**. Non-catalog items will display **Copy** and **Delete**.

Creating Requisitions: Guided Buying



P. When a line item is expanded to display the details view, the user will see five subsections below information about the supplier. **Accounting, Shipping, Comments, Attachments, and Others**. Any of these subsections can be expanded by clicking the arrow to the left of each label.



Q. If a subsection contains incomplete or incorrect information, it will open by default once the user clicks into the line item details. Typically, this will include the **Accounting** and **Shipping** subsections.

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The screenshot shows the 'Guided Buying' interface for a requisition. At the top, it displays 'Versa Vac Checkout / RQ162254' and a 'Total Cost' of '\$25,021.65 USD'. The 'Accounting' section is highlighted with a '6Q' callout. It contains several dropdown menus with error messages: 'Bill To' (A05), 'Agency' (1300 - DEPARTMENT OF ADMINISTRATION), 'Budget Fund' (no value), 'Agency Management Unit' (no value), 'Funding Source' (no value), 'Inter-fund' (no value), 'Future 2' (000000 - DEFAULT), 'Natural Account' (no value), 'Agency Program' (no value), 'Project' (no value), 'Future 1' (0000 - DEFAULT), and 'Future 3' (00000 - DEFAULT). The 'Shipping' section is also visible with a '6Q' callout, showing 'Ship To' and 'Deliver To' fields.

R. Within the **Accounting** subsection, the user will find the following fields:

S. Bill To: Defaults from the users profile but can be modified using the drop-down menu.

The **Bill To** Location code selected will determine the **Bill To** address that is printed on the line item. The invoice will be delivered to the specified address.

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

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

V. Natural Account: Defines the type of expenditures.

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

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

Y. Funding Source: Source underlying an expenditure such as appropriations, federal grant, local funds, etc.

Z. Project: Segment related to projects in the Projects module.

AA. Inter-Fund: Transfers between Budget Funds

AB. Future 1, 2, 3: Reserved for future use.



- 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 necessary.
- 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.

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AC. 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.



Do NOT select **No Choice** or **Previous Fiscal Year XX** from the dropdown.

AD. 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**.

AE. 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.

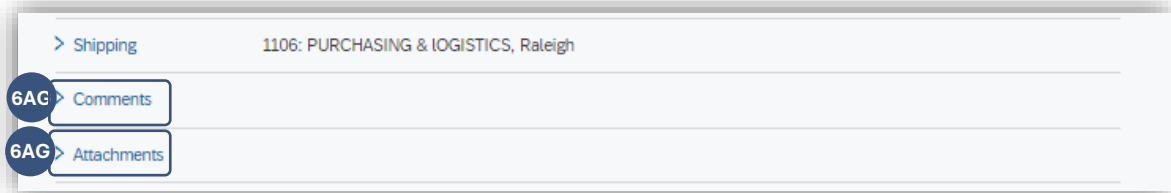
The screenshot shows the 'Accounting' section for 'Agency (1300 - DEPARTMENT OF ADMINISTRATION)'. It contains two columns of dropdown menus. The left column includes: 'Bill To *' (A05), 'Budget Fund', 'Agency Management Unit', 'Funding Source' (0000 - UNDESIGNATED), 'Inter-fund' (000000 - DEFAULT BUDGET FUND), 'Future 2' (000000 - DEFAULT), and 'Multi Year Indicator' (Unspecified). The right column includes: 'Agency' (1300 - DEPARTMENT OF ADMINISTRAT...), 'Natural Account', 'Agency Program' (0000000 - DEFAULT AGENCY PROGRAM), 'Project' (0000000000 - DEFAULT PROJECT), 'Future 1' (0000 - DEFAULT), 'Future 3' (00000 - DEFAULT), and 'Item Classification' (Good). A 'Split accounting' link is at the bottom left.

AF. Within the **Shipping** subsection, the user will find the **Ship To**, **Deliver To**, and **Need-by Date** fields that they had the option to previously fill out in the **Advanced Options** section at the top of the **Checkout** page. If the user needs to alter any of these on a per-line basis, they can do this here, but it is advised that these fields remain consistent across all line items.

The screenshot shows the 'Shipping' subsection for 'Company (1308)'. It includes: 'Ship To *' (437), 'Deliver To *' (requester), and 'Need-by Date' with a calendar icon. A '6Q' callout bubble is positioned over the 'Shipping' tab.

Creating Requisitions: Guided Buying

AG. It is possible to add **Comments** or **Attachments** in those respective subsections on a line item level, but it is strongly advised that they are **only added on the requisition level** (instructions on this can be found in a subsequent section) in order to make them more easily visible to the supplier.



The screenshot shows a requisition form with a header bar containing a right-pointing arrow, the text 'Shipping', and '1106: PURCHASING & LOGISTICS, Raleigh'. Below the header bar are two buttons, each with a blue circular icon containing the text '6AG' and a right-pointing arrow. The first button is labeled 'Comments' and the second is labeled 'Attachments'.

AH. Within the **Others** subsection, the user will find the following fields.



For catalog items, most fields in this subsection are not editable, while a Non-catalog line item will have a few more, editable fields within **Others**.

AI. Payment Terms: This field defaults to **N30** and can only be edited by a user with the **Purchasing Agent** role.

AJ. Commodity Code: This field is not editable for catalog items, but on Non-catalog items, it is editable and will populate with the value selected in the **Category** field on the initial **Non-catalog request** page.

AK. The **Incoterms Code** 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.

AL. Contract: This field will only display on Non-catalog items and it defaults to (no value). It cannot be edited.

AM. Contract Type: This field is not editable for catalog items, but on Non-catalog items the user can 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:

- **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.
- **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.
- **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.
- **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.
- **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.

Creating Requisitions: Guided Buying



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 **Browse all** to search for and select the Statewide Contract from which the item is being purchased.

Contract (no value)

Bid Number (no value)

Blanket Purchase Order? Yes No

Contract Type: Term Contract Statewide

Payment Basis: Receipt

Statewide Contract ID: (no value)

6AM

This field is required when the Contract Type is Statewide Term Contract.



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.

Contract (no value)

Bid Number (no value)

Blanket Purchase Order? Yes No

Contract Type: Term Contract Agency Specific

Payment Basis: Receipt

Agency Contract ID

6AM

If Agency Contract ID is visible, it is required.

AN. To add a comment at the requisition level, the user should type their note in the **Write your comment...** box in the **Comments** section below the line items. The **Add** button will become clickable, and the user should click in the **Share with supplier** box if they wish for the supplier to see the comment, otherwise it will only be visible internally. The user can add multiple comments to a single RQ, and they will thread below with the most recent closest to the top. Comments can be deleted by the user by clicking **Remove**.

Comments

Write your comment...

Share with supplier Add

6AN

NCAS Requester 6/7/20
Sample internal comment
Remove

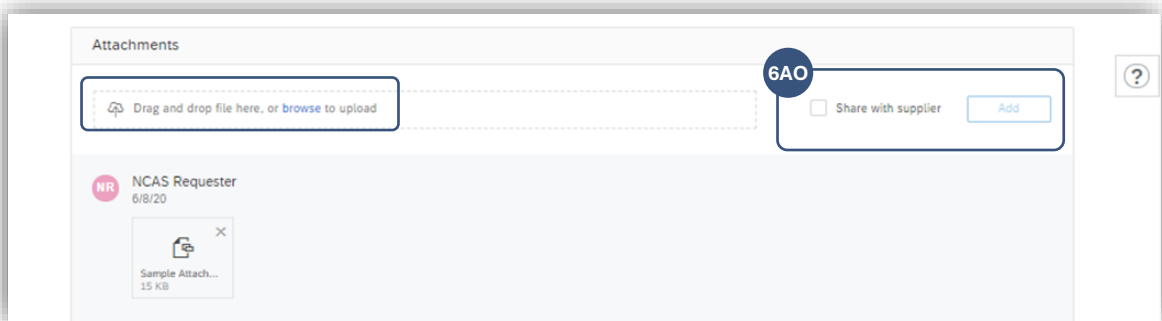
NCAS Requester 6/7/20 **Shared with supplier**
Sample Comment for supplier
Remove

Creating Requisitions: Guided Buying

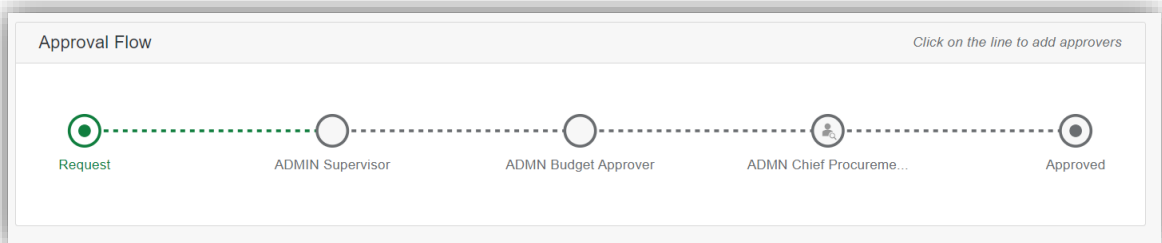
AO. Attachments may be added to the entire RQ in the **Attachments** section below the **Comments** section. Users can either **Drag and drop** a file to upload it, or they can click **browse** to search for files within their computer. Once a file has been selected, the **Add** button will become clickable, and the user should click in the **Share with supplier** box if they wish for the supplier to see the attachment, otherwise it will only be visible internally. The user can add multiple attachments to a single RQ. Attachments can be deleted by the user by clicking the **X** in the top right of the attachment icon.



- 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, .xltx, .xml, and .zip
- The maximum combined file size limit for attachments is 10MB.

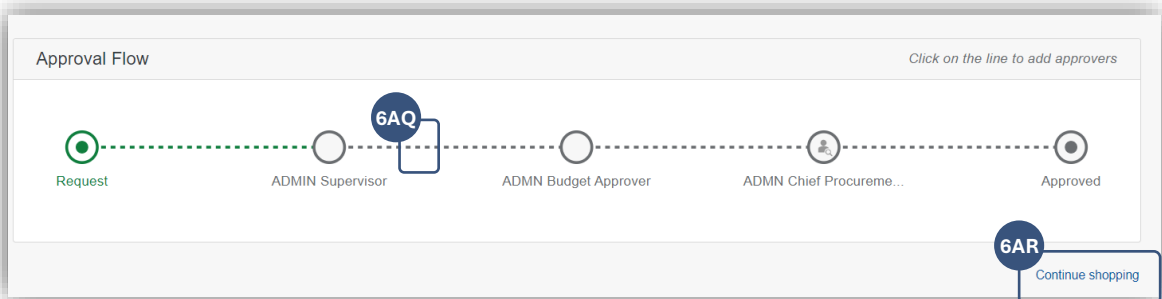


AP. The system generated approval flow will be visible in the **Approval Flow** section.



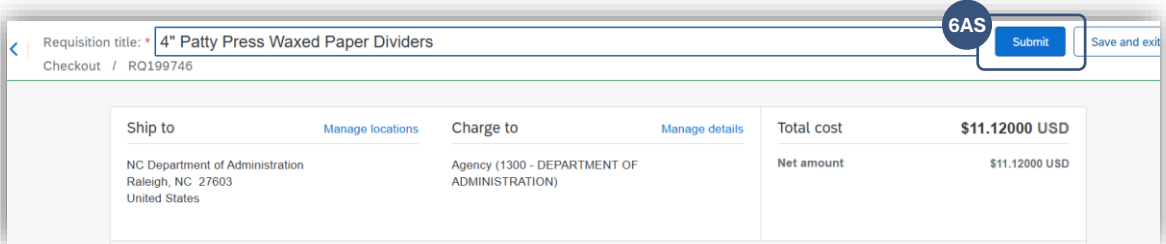
AQ. Users can manually add additional approvers by clicking between existing approvers and selecting the desired approver from the dropdown.

AR. If the user needs to add additional items to this RQ, they can click the **Continue shopping** link at the bottom of the RQ and be directed back to the catalog where they can add additional items.



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AS. When all required information is correctly added, the red borders and notifications will disappear from the **Checkout** page, and the **Submit** button will appear in blue in the upper-right and become clickable. Click this button to send the RQ to be reviewed and approved by the approval flow.



AT. This will submit the requisition for budget check. A **Success** notification will display, and the RQ status will be updated to **Submitted**. Click **Done** to return to the Guided Buying home page, or **View requisition** to revisit the details of the RQ. To view the status of the budget check, expand Show advanced options and 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** section will display the **Budget Check Status** as well.

