

HUB Goods and Services Reporting

Introduction

Each quarter, public entities report their Historically Underutilized Business (HUB) vendor spending to the HUB office. HUB Statistics users will submit HUB Statistics records to the HUB office using the electronic Vendor Portal (eVP) system. This process guide will show users with the HUB Statistics User role how to update and approve a HUB Statistics record.



STATE DEPARTMENT STATE BRANCH
LOCAL GOVERNMENT CITY COUNTY
COMMUNITY COLLEGE PUBLIC SCHOOL
NORTH CAROLINA ePROCUREMENT PURCHASE
ONLINE SHOPPING STATEWIDE TERM CONTRACTS
ELECTRONIC VENDOR PORTAL HUB CERTIFIED V
QUOTE PUNCHOUT CATALOG
PURCHASE ORDER
SOURCING
BIDDING
BUY

Learning Objectives

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



Access a Hub Statistics Record.



Review a HUB Statistics Record.



Approve a HUB Statistics Record.

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Accessing a HUB Statistics Record

1 The electronic Vendor Portal will create a HUB Statistics record for each entity on the first day of the quarter.

A. To find a HUB Statistics record, a user with the HUB Statistics User security role can click the **HUB Statistics** option from the navigation panel on the left side of the screen.

B. Next, double-click on the desired record on the **Active HUB Statistic** page.

The screenshot shows the 'Active HUB Statistic' page. On the left, a navigation menu has 'HUB Statistics' highlighted with callout 1A. The main table has columns: Fiscal Year, Quarter, Approved By, Approved On, Status Reason, and Created On. Callout 1B points to a row for the year 2023, quarter 1st - July 1 - Sept 30, approved by 'EVPTestSix EVPTestSix'.

Fiscal Year	Quarter	Approved By	Approved On	Status Reason	Created On
2024	1st - July 1 - Sept 30	Julie Cloninger	5/26/2023 1:36 PM	Submitted	5/26/2023 1:21 PM
2023	1st - July 1 - Sept 30	Ana Harley	1/27/2023 11:59 AM	Submitted	1/27/2023 11:58 AM
2023	1st - July 1 - Sept 30	Jessica Harrison	3/7/2023 8:23 AM	Submitted	1/31/2023 2:05 PM
2023	1st - July 1 - Sept 30	EVPTestSix EVPTestSix	6/8/2023 1:27 PM	Submitted	6/8/2023 1:09 PM
2023	1st - July 1 - Sept 30	EVPTestSix EVPTestSix	6/5/2023 4:31 PM	Submitted	6/5/2023 4:19 PM
2023	2nd - Oct 1 - Dec 31			Pending	2/13/2023 1:13 PM
2023	2nd - Oct 1 - Dec 31	Ana Harley	1/27/2023 11:57 AM	Submitted	1/27/2023 11:53 AM
2023	2nd - Oct 1 - Dec 31	# Flow-RP	1/31/2023 8:00 AM	Pending	1/31/2023 9:17 AM
2023	2nd - Oct 1 - Dec 31	Ned Bliss		Pending	2/14/2023 3:30 PM

Reviewing a HUB Statistics Record

2 The **Fiscal Year** and **Quarter** fields will be pre-populated.

The screenshot shows the '3rd Quarter - 2023' record form. The 'Fiscal Year' field is pre-populated with '2023' and the 'Quarter' field is pre-populated with '3rd - Jan 1 - March 31'. Other fields like 'Approved By' and 'Approved On' are also visible.

The following fields may be pre-populated based on if the entity the report is for uses the HUB Spending Report System. If the fields are not pre-populated, users should be able to update the fields to the correct values.

A. Review the **Term Contract Purchases (HUB & Non-HUB)** field. It will be populated with the total amount of contract purchases during the quarter. If necessary, click on the field and enter a new value.

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B. Next, review the total contract purchase amounts by ownership category for the quarter. The ownership categories are listed below. The amounts can be updated by clicking on the category and entering a new amount.

- **Black**
- **Hispanic**
- **Asian American**
- **American Indian**
- **Female**
- **Disabled Owned**
- **Socially and Economically Disadvantaged**
- **Disabled Business Enterprise**
- **Non-Profit Work Center**

The **Term Contract Purchases (HUB)** field will update with the sum of the **Black, Hispanic, Asian American, American Indian, Female, Disabled Owned, and Socially and Economically Disadvantaged** fields once the save button is clicked. The **Disabled Business Enterprise, and Non-Profit Work Center** amounts are not included in the **Term Contract Purchases (HUB)** field.

1st Quarter - 2023 - Saved
HUB Statistic

General Related ▾

Term Contract Purchases (HUB & Non-HUB)	\$1,000	Term Contract Purchases (HUB & Non-HUB) %	13.89
Black	(\$50)	Black %	-0.69
Hispanic	\$0	Hispanic %	0.00
Asian American	\$100	Asian American %	1.39
American Indian	\$0	American Indian %	0.00
Female	\$0	Female %	0.00
Disabled Owned	\$0	Disabled Owned %	0.00
Socially and Economically Disadvantaged	\$0	Socially and Economically Disadvantaged %	0.00
Term Contract Purchases (HUB)	\$50	Term Contract Purchases (HUB) %	0.69
Disabled Business Enterprise	\$0	Disabled Business Enterprise %	0.00
Non-Profit Work Center	\$0	Non-Profit Work Center %	0.00

C. Review the **Commodity Purchases (HUB & Non-HUB)** field. It will be populated with the total amount of commodity purchases during the quarter. If necessary, click on the field and enter a new value.

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D. Next, review the total commodity purchase amounts by ownership category for the quarter. The ownership categories are listed below. The amounts can be updated by clicking on the category and replacing the current amount with the new amount.

- **Black**
- **Hispanic**
- **Asian American**
- **American Indian**
- **Female**
- **Disabled Owned**
- **Socially and Economically Disadvantaged**
- **Disabled Business Enterprise**
- **Non-Profit Work Center**

The **Commodity Purchases (HUB)** field will update with the sum of the **Black, Hispanic, Asian American, American Indian, Female, Disabled Owned, and Socially and Economically Disadvantaged** fields once the save button is clicked. The **Disabled Business Enterprise, and Non-Profit Work Center** amounts are not included in the **Commodity Purchases (HUB)** field.

1st Quarter - 2023 - Saved
HUB Statistic

General Related ▾

Commodity Purchases (HUB & Non-HUB)	\$5,600	Commodity Purchases (HUB & Non-HUB) %	77.78
Black	\$0	Black %	0.00
Hispanic	\$235	Hispanic %	3.26
Asian American	\$100	Asian American %	1.39
American Indian	\$0	American Indian %	0.00
Female	\$0	Female %	0.00
Disabled Owned	\$0	Disabled Owned %	0.00
Socially and Economically Disadvantaged	\$0	Socially and Economically Disadvantaged %	0.00
Commodity Purchases (HUB)	\$335	Commodity Purchases (HUB) %	4.65
Disabled Business Enterprise	\$1,000	Disabled Business Enterprise %	13.89
Non-Profit Work Center	\$0	Non-Profit Work Center %	0.00

E. Review the **Services Purchases (HUB & Non-HUB)** field. It will be populated with the total amount of commodity purchases during the quarter. If necessary, click on the field and enter a new value.

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J. Next, review the total service purchase amounts by ownership category for the quarter. The ownership categories are listed below. The amounts can be updated by clicking on the category and replacing the current amount with the new amount.

- **Black**
- **Hispanic**
- **Asian American**
- **American Indian**
- **Female**
- **Disabled Owned**
- **Socially and Economically Disadvantaged**
- **Disabled Business Enterprise**
- **Non-Profit Work Center**

The **Services Purchases (HUB)** field will update with the sum of the **Black, Hispanic, Asian American, American Indian, Female, Disabled Owned, and Socially and Economically Disadvantaged** fields once the save button is clicked. The **Disabled Business Enterprise, and Non-Profit Work Center** amounts are not included in the **Commodity Purchases (HUB)** field.

Service Purchases (HUB & Non-HUB)	\$600	Service Purchases (HUB & Non-HUB) %	8.33
2J Black	\$600	Black %	8.33
Hispanic	\$0	Hispanic %	0.00
Asian American	\$0	Asian American %	0.00
American Indian	\$0	American Indian %	0.00
Female	\$0	Female %	0.00
Disabled Owned	\$0	Disabled Owned %	0.00
Socially and Economically Disadvantaged	\$0	Socially and Economically Disadvantaged %	0.00
Service Purchases (HUB)	\$600	Service Purchases (HUB) %	8.33
2J Disabled Business Enterprise	\$0	Disabled Business Enterprise %	0.00
Non-Profit Work Center	\$0	Non-Profit Work Center %	0.00

- The **Total All Purchases** field is calculated as the sum of the **Term Contract Purchases (Hub & Non-HUB), Commodity Purchases (HUB & Non-Hub) and Service Purchases (HUB & Non-HUB)**.
- The percentage fields on the right-hand side of the record will not populate until the **Total All Purchases** field is populated.

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Approving a HUB Statistics Record

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Once all the fields have been reviewed or updated, click the **Approve** button from the command menu to finalize the record.

A. After the **Approve** button is selected, the **Approved By** and **Approved On** fields will automatically populate with the user's name and the date that the record was approved. The status of the record will change to **Submitted**.

