

## **Purchase & Contract**

Department of Administration

*Trainings for*

# The Procurement Professional

Course Catalog

2019

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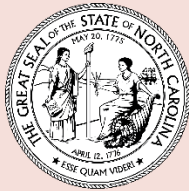
# Course Offering Quick Guide

<b>Purchase &amp; Contract Courses</b>	<b>Purchase &amp; Contract Online Trainings</b>	<b>E-Procurement Online Trainings</b>	<b>NIGP Trainings</b>
Introduction to Procurement	Choosing the Correct Commodity Code	Advanced Functionality	Developing and Managing Request for Proposals
Specification Writing	How to Reset Your IPS Password	Approving Process	Legal Aspects of Public Procurement
Request for Proposal (RFP) Development and Evaluation	Agency Procurement Planning	Catalog Approval Process	Strategic Procurement Planning
Contract Administration and Monitoring	Preliminary Review of Service Solicitations	Receiving Process	Protests: Managing Options for Positive Results
Determining Cost	Executive Leadership: Procurement Basics	Reporting	Contract Administration in the Public Sector
Demystifying Terms and Conditions	Inspection Introduction	Requisitioning	Fundamentals of Leadership and Management
E-Procurement	Tier 2 Inspections	Security Administration	Financial Analysis for Procurement Professionals
	Commodity Specific Inspection Examples	System Navigation	Risk Management in Public Sector Contracts
	Inspections Pass, Fail, Re-inspect		Get What You Need Through Successful Negotiation
	NC BIDS for Agencies		Advance Your Negotiation Skills
	Posting a Bid Using NC BIDS		CPPB Prep
	NC Procurement Certification		CPPO Prep

## Symbols to Keep in Mind



All online training courses with the NC electronic Vendor Portal logo indicates that the course was created and is being offered and instructed by P&C.



**Purchase & Contract**  
Department of Administration

All traditional and online training courses with the Division of Purchase & Contract logo indicates that the course was created and is being offered and instructed by P&C.



All traditional training courses with the NIGP The Institute for Public Procurement logo indicates that the course was created and is being offered and instructed by NIGP at the P&C location.



All traditional and online training courses with the NC E-Procurement logo indicates that the course was created and is being offered and instructed by the NC E-Procurement Team. Please note that these training courses are created specifically for those who use the E-Procurement system.

## Abbreviations

LMS	Learning Management System Also referred to as NC Learning Center and NCVIP
HR-Integrated Payroll System	Formerly called BEACON
DOA	Department of Administration
P&C	Division of Purchase & Contract
IFB	Invitation for Bid The Division of Purchase & Contract's solicitation template for goods and simple services.
RFP	Request for Proposal The Division of Purchase & Contract's solicitation template for complex services and combinations of goods and services.
DIT	Department of Information Technology

## Definitions



# Registration Instructions for Traditional Trainings

NC Learning Center

Registration for the Division of Purchase & Contract's courses is available through the NC Learning Center. All individuals employed with any state agency, department, institution, community college, or university governed by Chapter 143 Article 3 of the North Carolina General Statutes will receive preferential seating in these traditional courses. Individuals employed by local government or public school entities may choose to take these courses as well, but may have deferred enrollment due to priority preference for entities governed by Article 3 of the NC General Statutes.

Keep in mind that all traditional trainings are based on Purchase & Contract (P&C) related rules for goods and service procurements. These courses will not relate to any DIT, State Construction, or State Property laws and rules.

**Registration instructions for state agencies and institutions are different from all other entities.** State agencies and institutions register using the Integrated HR-Payroll System. All other entities should register through the P&C website in order to create an account in the NC Learning Center. Please follow the instructions below as it relates to your place of employment. Please find, following these instructions, a job aid to assist your supervisor/manager with approving your training request(s).

**If you have any questions or concerns when registering for courses within the NC Learning Center, please contact your agency LMS Administrator. If you are unsure of who serves in this role, please use this [link](#) to locate their contact information.**

Registration

## Integrated HR-Payroll System Users – Formerly BEACON (State Agencies and Institutions)

If you are an Integrated HR-Payroll System (formerly BEACON) user, follow the instructions below to register.

1. Select **NEXT** to sign into the Integrated HR-Payroll System (formerly BEACON).



**INTEGRATED HR-PAYROLL SYSTEM**  
HR | PAYROLL | BENEFITS | TRAINING | TIME

Formerly BEACON

Click Next to sign in

Next

[Customer Service](#) | [System Status](#) | [Privacy & Security](#) | [Legal](#)

2. Enter your NCID user ID and password in the fields provided.

NCID Post Upgrade Tips

NCID

NCID Login

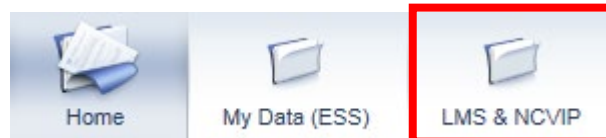
[Forgot Username](#)  
[Forgot Password](#)  
[Unlock Account](#)

[Need Help?](#) [Register!](#)

[Privacy and Other Policies](#) [Contact Us](#)

WARNING: This is a government computer system, which may be accessed and used only for authorized business by authorized personnel. Unauthorized access or use of this computer system may subject violators to criminal, civil and/or administrative action.  
NCC743

3. Select the **LMS & NCVIP** tab and click on the **SUBMIT** button.



**AND**



Click "Submit" to enter NC Learning Center

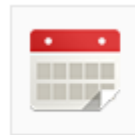
Submit

If you have trouble connecting, please click [here](#) for an FAQ Help document.  
If you have questions about LMS content, please contact your agency [LMS Coordinator](#).  
Contact BEST Shared Services at [BEST@osc.nc.gov](mailto:BEST@osc.nc.gov) if additional assistance is required.

4. From the NC Learning Center home page, type **P&C** in the global search box located in the top right corner of the page. Press **ENTER** on your keyboard.



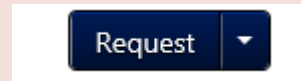
5. Click on the course title to view the list of available offerings.



#### **P & C - eQuote**

Event | Administration, Dept. of | \$0.00  
This course provides hands on computer training vendors.

6. Select the **REQUEST** button to enroll in a course corresponding to the title you are interested in attending.



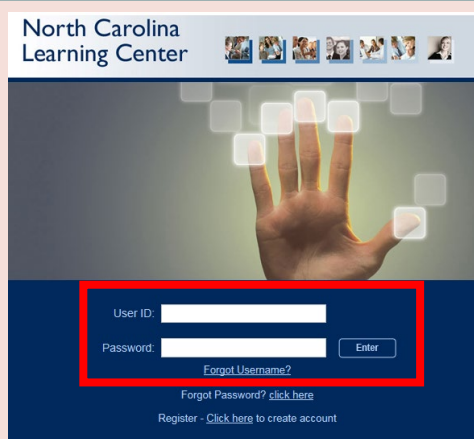
7. Wait for the registration confirmation email from the NC Learning Center.
8. An additional email will be sent directly from P&C containing important information for the course typically within one week of the start date for the course.

## Extended Enterprise Users (Community Colleges, Local Government Entities, Public Schools, and Universities)

Community college, local government, public school, and university employees must first [create an account](#) with the NC Learning Center before registering for training courses. Click on the link to create your account. When creating an account, please use your work email. Once you create an account, follow the instructions below to register.

1. Type <https://ncgov.csod.com/client/ncgov/default.aspx> into your web browser. You must use Internet Explorer!

2. Enter the login and password established when you created your account.



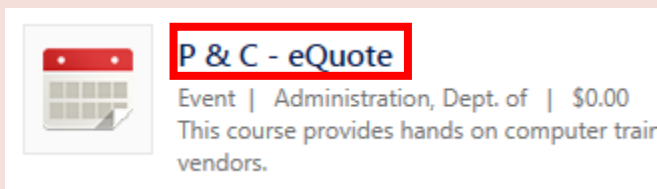
3. Click on the **P&C LOGO** on the home page.



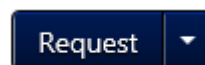
### Purchasing and Contract Training NC Department of Administration

The Division of Purchase & Contract is the central purchasing authority for all state departments, institutions, agencies, universities, and community colleges. It also makes certain services available to local governments, public school systems, private colleges and universities, and other non-state entities.

4. Click on the title of the course to view a list of available dates.



5. Identify the date, location and time of the course you prefer. Then select the **REQUEST** button to choose a course corresponding to the title you are interested in attending.



6. Expect an email from the NC Learning Center confirming your registration.
7. An additional email will be sent directly from P&C containing important information for the course typically within one week of the start date for the course.

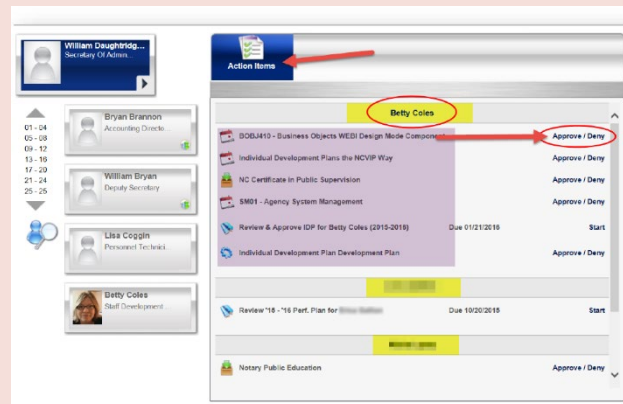
## Job Aid – Approving Your Employees' Training Requests

If you are a supervisor/manager, please follow the steps below for approving staff training requests, if required, in the NC Learning Center.

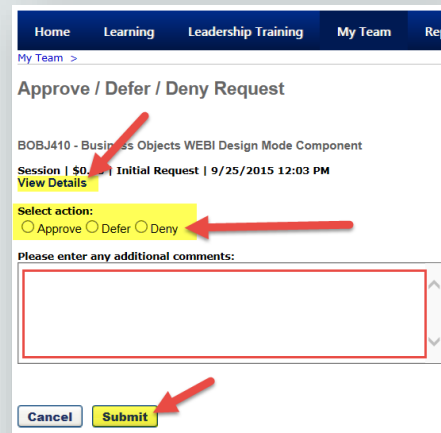
1. Log into the Integrated HR-Payroll System (formerly BEACON). Select the **LMS & NCVIP** tab. Next, hover over the **My Team** tab, then click on **My Team**.



2. You will be brought to your **Action Items** tab. These items are separated by employee. This is your “to do” list in LMS/NCVIP. Start with your first employee. Find the training they are requesting on the left-hand side, then click the **Approve/Deny** link on the right-hand side.



3. On the next screen, you can click **View Details** to see more information about this particular course. You will then select your action of either **Approve**, **Defer**, or **Deny**. You have the option of adding a comment in the box below, then click **Submit**.



## Minimum Course Size & Registration Cancellations

### Minimum Course Size

Due to limited staff, P&C will cancel any course that fails to meet the minimum number of required participants, including those that are scheduled outside of the Raleigh area. Participants will be notified via email of a course cancellation.

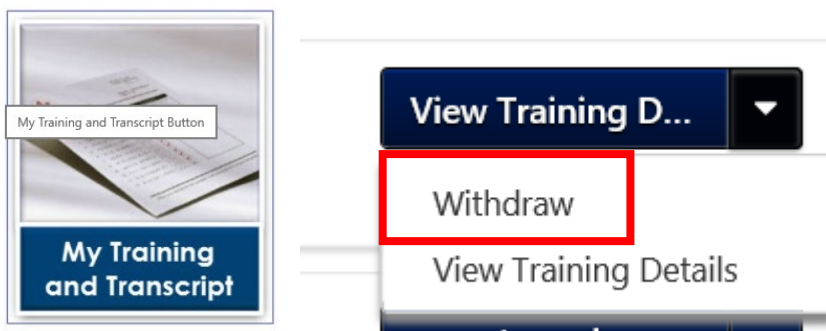
### Cancellation Requests

If you are currently registered for a course but are no longer able to attend, please cancel your registration as soon as possible using the NC Learning Center. Doing so provides an opportunity for a waitlisted participant to attend in your place, or in the event of low enrollment, will help us determine if a course should be cancelled.

The Division of Purchase & Contract will cancel courses when the weather or other factor creates unsafe conditions for participants.

### Withdraw from a Course

If you are registered for a course and are unable to attend, please withdraw yourself by going to your transcript within the NC Learning Center and clicking the **WITHDRAW** button next to the course title.



## Parking Map

The Department of Administration is located in downtown Raleigh on 116 W. Jones St. (on the map below it is marked by a red star). Visitor parking can be found on McDowell Street (deck #75), Edenton Street (deck #77) and Jones Street (lot #18).

Downtown parking is not free! Both decks and the lot have a booth that will dispense parking tickets. You are responsible for keeping this ticket for payment purposes. The parking fee is \$2.00 per hour. To pay, you must use cash, Visa, or Mastercard. The decks and lot locations are framed in red on the map below.



For more information please visit the State Parking Division [website](#).

Where to Park

## Hotels Near the Department of Administration


Hotel Name	Address
Hampton Inn & Suites Raleigh Downtown	600 Glenwood Ave. Raleigh, NC 27603 (919) 825-4770 Approximately 0.9 miles from DOA
Holiday Inn Raleigh Downtown	320 Hillsborough St. Raleigh, NC 27603 (919) 832-0501 Approximately 0.4 miles from DOA
Days Inn by Wyndham Raleigh	300 N. Dawson St. Raleigh, NC 27603 (919) 828-9081 Approximately 1.3 miles from DOA
Raleigh Marriott City Center	500 Fayetteville St. Raleigh, NC 27601 (919) 833-1120 Approximately 0.7 miles from DOA
Residence Inn by Marriott Downtown	616 S. Salisbury St. Raleigh, NC 27601 (919) 856-0017 Approximately 0.8 miles from DOA
Sheraton Raleigh	421 S. Salisbury St. Raleigh, NC 27601 (919) 834-9900 Approximately 0.6 miles from DOA
The McKimmon Center located on NC State University campus, which is close to downtown, also maintains a list of <a href="#">hotel options</a> .	
P&C does not endorse any specific hotel and cannot provide any recommendations regarding accommodations. This is also not an exhaustive list.	



## Contact the Training Team

If you have any questions concerning upcoming courses or how to register, please contact the P&C training team or receptionist.

Dr. Jody Cleven  
Training Manager  
[jody.cleven@doa.nc.gov](mailto:jody.cleven@doa.nc.gov)  
919-807-4563



# Traditional Trainings

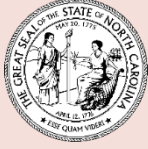
P&C Instructor-led Trainings


# P&C Traditional Trainings



## Course Descriptions


Introduction to Procurement should be taken as a foundation before Specification Writing, Request for Proposal, and Modifying Solicitation Forms. Information in Introduction to Procurement will not be repeated in-depth in other courses.

 <b>Purchase &amp; Contract</b> Department of Administration	<b>Introduction to Procurement</b> (formerly NC Procurement)		
<b>Description</b>	<p>This 3-day instructor-led course provides a comprehensive overview of the procurement process for purchasing goods and services not related to information technology, construction, or grants. The content of this course includes the following topics: basic principles of procurement, understanding the administrative code and general statutes, delegation of authority, ethics, procurement methods, procurement planning, developing specifications and scope of work, developing solicitations, solicitation documentation, competitive bidding, evaluation, terms and conditions, negotiation, resolution of protests and disputes, and best practices.</p> <p>This course is scheduled from 8:30 a.m. to 4:30 p.m.</p>		
<b>Prerequisite</b>	None		
<b>Target Audience</b>	Anyone involved in the procurement process. This includes Purchasing Agents, Purchasing Officers, End Users, Controllers, Auditors, etc.		
<b>Cost</b>	Free		
<b>Schedule</b>	<u><a href="#">Dates</a></u>	<u><a href="#">Location</a></u>	<u><a href="#">Facility</a></u>
	January 8 – 10	Raleigh	P&C (G111)
	March 12 – 14	Raleigh	P&C (G111)
	July 16-18	Raleigh	P&C (G111)


 <p><b>Purchase &amp; Contract</b> Department of Administration</p>	<h2 style="text-align: center;">Specification Writing</h2>		
<b>Description</b>	<p>This 1-day instructor-led course explains the purpose of specification writing to obtain a commodity that will satisfy a specific need at an economical cost. In this interactive course, participants will discuss how writing a specification relates to sections of the Invitation for Bid, identifies key components of a specification that make it nonrestrictive and the components that promote competition, explores each type of specification, and determines when each type of specification is used for a specific need.</p> <p>This course is scheduled from 8:30 a.m. to 4:30 p.m.</p>		
<b>Prerequisite</b>	Introduction to Procurement		
<b>Target Audience</b>	Purchasing Agents, Purchasing Officers, Contract Administrators and End Users		
<b>Cost</b>	Free		
<b>Schedule</b>	<a href="#"><u>Dates</u></a>	<a href="#"><u>Location</u></a>	<a href="#"><u>Facility</u></a>
	January 24	Raleigh	P&C (G111)
	March 27	Raleigh	P&C (G111)
	July 31	Raleigh	P&C (G111)

 <p><b>Purchase &amp; Contract</b> Department of Administration</p>	<h2 style="text-align: center;">Request for Proposal (RFP) Development &amp; Evaluation</h2>		
<b>Description</b>			


	<p>This 2-day instructor-led course is an in-depth study of RFPs. This course is designed to help participants understand the processes of creating and evaluating RFP solicitations.</p> <p>This course is scheduled from 8:30 a.m. to 4:30 p.m.</p>		
<b>Prerequisite</b>	Introduction to Procurement		
<b>Target Audience</b>	Purchasing Agents, Purchasing Officers, End Users, and those on an evaluation team		
<b>Cost</b>	Free		
<b>Schedule</b>	<u><a href="#">Dates</a></u>	<u><a href="#">Location</a></u>	<u><a href="#">Facility</a></u>
	February 12 – 14	Raleigh	P&C (G111)
	April 2 – 4	Raleigh	P&C (G111)

 <p><b>Purchase &amp; Contract</b> Department of Administration</p>	<h2>Contract Administration &amp; Monitoring</h2>
<b>Description</b>	<p>This 1-day instructor-led course is an introduction to the process of managing a contract. The topics discussed include contract administration principles, terminology, roles and responsibilities of contract administrators, problem-solving and negotiating with Vendors, and best practices for</p>

	<p>individuals responsible for administering or managing contracts.</p> <p>This course is scheduled from 8:30 a.m. to 4:30 p.m.</p>		
<b>Prerequisite</b>	None		
<b>Target Audience</b>	Purchasing Agents, Purchasing Officers, End Users, Contract Administrators, Contract Managers, Project Managers, etc.		
<b>Cost</b>	Free		
<b>Schedule</b>	<u><a href="#">Dates</a></u>	<u><a href="#">Location</a></u>	<u><a href="#">Facility</a></u>
	February 26	Raleigh	P&C (G111)
	April 18	Raleigh	P&C (G111)

 <p><b>Purchase &amp; Contract</b> Department of Administration</p>		<p><b>Demystifying Terms and Conditions</b> (Formerly Solicitation Documents &amp; The Law)</p>
<b>Description</b>	<p>This 1-day instructor-led course includes a review of the legal significance of content in the state's IFB and RFP templates. Learn about the terms and conditions that can be negotiated, according to law. Understand when a decision is a business decision that can be made by the purchaser or purchasing officer and when it is a decision that requires legal advisement. This course will focus on explaining why the sometimes obscure and puzzling provisions in the solicitation</p>	

	<p>document are important for creating an effective and enforceable contract.</p> <p>This course is scheduled from 8:30 a.m. to 4:30 p.m.</p>		
<b>Prerequisites</b>	None		
<b>Target Audience</b>	Purchasing Agents, Purchasing Officers, End Users, Contract Managers, Contract Administrators, Project Managers, Business Owners, etc.		
<b>Cost</b>	Free		
<b>Schedule</b>	<u><b>Dates</b></u>	<u><b>Location</b></u>	<u><b>Facility</b></u>
	March 7	Raleigh	P&C (G111)
	June 20	Raleigh	P&C (G111)
	September 25	Raleigh	P&C (G111)

	<b>E-Procurement</b>
<b>Description</b>	<p>This 1-day instructor-led course provides hands-on computer training on how to use the NC E-Procurement system. This includes system navigation, how to save searches, and how to create requisitions, purchase orders, and folders. It also explores Statewide Term Contract catalogs and other special features and benefits.</p> <p>This course is scheduled from 9 a.m. to 4:30 p.m.</p>
<b>Prerequisites</b>	None

<b>Target Audience</b>	Purchasing Agents, Purchasing Officers and Requisitioners for State Agencies using the E-Procurement System		
<b>Cost</b>	Free		
<b>Schedule</b>	<u><a href="#">Dates</a></u>	<u><a href="#">Location</a></u>	<u><a href="#">Facility</a></u>
	January 3	Raleigh	Wake Tech Community College
	January 29	Raleigh	Wake Tech Community College
	February 19	Raleigh	Wake Tech Community College
	February 26	Raleigh	Wake Tech Community College
	March 5	Raleigh	Wake Tech Community College
	March 19	Raleigh	Wake Tech Community College
	April 10	Raleigh	Wake Tech Community College
	April 23	Raleigh	Wake Tech Community College
	May 14	Raleigh	Wake Tech Community College
	June 18	Raleigh	Wake Tech Community College
	June 26	Raleigh	Wake Tech Community College
	July 10	Raleigh	Wake Tech Community College
	July 17	Raleigh	Wake Tech Community College
	August 6	Raleigh	Wake Tech Community College



August 21	Raleigh	Wake Tech Community College
September 4	Raleigh	Wake Tech Community College
September 24	Raleigh	Wake Tech Community College
October 3	Raleigh	Wake Tech Community College
October 16	Raleigh	Wake Tech Community College
November 6	Raleigh	Wake Tech Community College
November 19	Raleigh	Wake Tech Community College
December 5	Raleigh	Wake Tech Community College
December 10	Raleigh	Wake Tech Community College





# NIGP Training

Instructor-led Trainings by Institute  
of Governmental Purchasing

# Registration Instructions for NIGP Trainings

## Logistics

The Division of Purchase & Contract will partner with NIGP The Institute for Public Procurement to offer procurement training opportunities at a reduced cost. A complete schedule of upcoming NIGP trainings will be released soon as well as the cost for each course.

**All registrations for these courses must be done through NIGP and all questions regarding NIGP courses should be addressed to the NIGP staff. NIGP can be contacted through their [website](#), where information can also be found about the [UPPCC certification](#) requirements for the CPPB and the CPPO.**

<b>Course Locations</b>	Purchase & Contract Training Room (G111)
<b>Proposed Courses and Descriptions</b>	<p><b>Developing &amp; Managing Request for Proposals</b> This course is uniquely designed to prepare procurement professionals to use the Request for Proposals (RFP) process to its maximum potential. The course agenda will identify the process, offer a key understanding of the elements of the proposal, and ascertain ways in which the document can be used to its full capability. Pitfalls and success stories will make the course relevant and applicable when planning to incorporate this type of solicitation into the government process. Practical examples, discussion, group exercises, and case studies will be used throughout the course.</p> <p><b>Legal Aspects of Public Procurement</b> Designed to be an educational exploration of the legal elements of public procurement, this course will provide a foundation of the principles and general concepts of the law as it applies to public procurement. Course content will address issues such as the Uniform Commercial Code (U.C.C.), the Model Procurement Code, Sale of Goods Act and the legal implications surrounding solicitations, contracting, and post-award issues. Attention will be given to the ethical issues facing the profession relevant to the law. This course will focus on actual procurement situations with relevant procurement implications using practical examples, discussion, group exercises, and case studies throughout the course.</p> <p><b>Strategic Procurement Planning</b> The direction of public sector organizations has generated increased demand for strategic procurement planning and participation by procurement professionals in the actual implementation of many projects—particularly out-sourcing, privatization, and public-private partnerships. This course provides practical tools and approaches that can be used by</p>

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the procurement practitioner to contribute to an organization's strategic mission. These include the development of strategic plans, the strategic role of procurement in the budget process, pricing strategies and value-adding analysis techniques, the tools and analytics of strategic sourcing, client satisfaction strategies, and talent management. Practical examples, discussion, group exercises, and case studies will be used throughout the course.

**Protests: Managing Options for Positive Results**

Protests are all too common; they take time and can be expensive. This course examines why they happen and offers tools and strategies to reduce their occurrence and what to do when a protest is received.

**Contract Administration in the Public Sector**

This course provides a framework for examining contract administration by focusing on essential elements of the discipline. The intent is for the student to develop a strong understanding of the complexities of contract administration and recognize the importance of planning, monitoring, and proactive insight into and oversight of contract performance. Practical examples, discussion, group exercises and case studies will be used throughout the course.

**Fundamentals of Leadership and Management**

This course is designed to examine leadership and management issues regularly faced by public sector professionals. This course will focus on topics of motivation, decision making, communication, conflict management, group dynamics, and organizational change, with more attention being paid to how these issues relate. Discussions of theory with practical application are intended to improve an organization's effectiveness when considering the professional. Practical examples, discussion, group exercises, and case studies will be used throughout the course.

**Financial Analysis for Procurement Professionals**

Understanding financial statements helps procurement professionals make good decisions about suppliers. This course focuses on the key areas of the financial statements that are relevant to the agency when selecting a supplier. The course covers the level of analyses, relevant ratios and why they are important for procurement categories. The course concludes with a financial analysis game using the concepts.

**Risk Management in Public Sector Contracts**

Risk is a critical consideration in the contracting and procurement process. A thoughtful and proactive approach toward risk, as it relates to specific procurement actions, contributes to the success of contract performance. Risk is

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directly related to the successful achievement of targeted goals and objectives. The emphasis of this course is on developing a solid understanding of the complexities of risk management. The course content recognizes the importance of planning, monitoring, and proactive insight and oversight into risk areas related to the contract's stated performance outputs and outcomes. Practical examples, discussion, group exercises, and case studies will be used throughout the course.

### **Get What You Need Through Successful Negotiation**

This course will introduce students to some of the basic negotiation principles and some new skills used by master negotiators. Topics covered include preparation strategies, tactics, communication and awareness of global applications. Practical exercises will allow students the chance to reinforce their skill development.

### **Advance Your Negotiation Skills**

The necessity to negotiate is part of our everyday life. The ability to negotiate and achieve results is something else. Any negotiating is not about a "one and done" mindset but a continued effort to achieve better results each and every time a negotiation is conducted. Following on the heels of "Get What You Need Through Successful Negotiation Strategies," this course will offer a deeper perspective on the skills and abilities needed to be a successful negotiator.

### **CPPB Prep**

In an effort to prepare candidates for the computer based written CPPB exam containing 190 questions, this course provides a review that addresses key information on topics identified in the 2013 UPPCC Body of Knowledge. Considered as a tool to help the student in assessing their own strengths and weaknesses as they relate to the subject matter, this course is only a part of the candidate's overall study plan for preparation. Candidates authorized to test should enroll in the course well in advance of the selected test date. Participation in this course does not guarantee success on the examination.

### **CPPO Prep**

In an effort to prepare candidates for the computer based written CPPO exam containing 190 questions, this course provides a review that addresses key information on topics identified in the 2013 UPPCC Body of Knowledge. Considered as a tool to help the student in assessing their own strengths and weaknesses as they relate to the subject matter, this course is only a part of the candidate's overall study plan for preparation. Candidates authorized to test should enroll in the course well in advance of the selected test date. Participation

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	in this course does not guarantee success on the examination.
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# Online Trainings


E-Procurement Website

# E-Procurement Online Training




## Course Descriptions

NC E-Procurement offers a diverse list of training materials for purchasers on its website, <http://eprocurement.nc.gov/>. To view a list of web-based and in-person trainings as well as webinars and job aids, click on the **User Training tab** located at the top of the home page. For your convenience, a list of NC E-Procurement web-based trainings are provided below.

	<b>E-Procurement Advanced Functionality</b>
<b>Description</b>	<p>This online course provides a detailed overview of the creation of change orders. By the end of this online course, participants will understand how to cancel purchase orders and resolve NCAS (North Carolina Accounting System) encumbrance failures.</p> <p><b><i>Please note: This course is NOT available for registration in the NC Learning Center. It is published on the NC E-Procurement <a href="#">website</a>. Please be aware that this training course will only operate with Adobe Flash Player 10 or higher.</i></b></p>
<b>Target Audience</b>	State agency purchasing professionals
<b>Cost</b>	Free
<b>Length</b>	Approximately 2 hrs. 20 mins. (if viewing from beginning to end)
<b>Interested?</b>	<b>Begin the advanced functionality training course <a href="#">here</a>.</b>



	<h2 style="text-align: center;">E-Procurement Approving Process</h2>
<p><b>Description</b></p>	<p>This online course discusses the approval flow tab and explains which users can act on them. Participants will also learn how to delegate approval authority and change email notification preferences. There are two (2) trainings for this course; one is designated for state agencies and the other for community colleges and school systems.</p> <p><b><i>Please note: This course is NOT available for registration in the NC Learning Center. Both versions of this course are published on the NC E-Procurement <a href="#">website</a>. Please be aware that these training courses will only operate with Adobe Flash Player 10 or higher.</i></b></p>
<p><b>Target Audience</b></p>	<p>State agency, community college, other school system purchasing professionals</p>
<p><b>Cost</b></p>	<p>Free</p>
<p><b>Length</b></p>	<p>Approximately 2 hrs. 50 mins. (if viewing from beginning to end)</p>
<p><b>Interested?</b></p>	<p><b>Begin the approving process training course for state agencies <a href="#">here</a>.</b></p>
	<p><b>Begin the approving process training course for community colleges and school systems <a href="#">here</a>.</b></p>



## E-Procurement Catalog Approval Process

### Description

This online course provides contract administrators with essential skills to approve catalogs that have been submitted by contract vendors. By the end of this online course, participants will understand what actions are required, the role of the content enablement team and the features available for reviewing catalogs in NC E-Procurement.

***Please note: This course is NOT available for registration in the NC Learning Center. It is published on the NC E-Procurement [website](#). Please be aware that this training course will only operate with Adobe Flash Player 10 or higher.***

### Target Audience

Contract administrators for P&C and DIT

### Cost


Free


### Length


Approximately 1hr. 20 mins. (if viewing from beginning to end)


### Interested?


**Begin the catalog approval process training course [here](#).**

	<h2 style="text-align: center;">E-Procurement Receiving Process</h2>
<b>Description</b>	<p>This online course discusses the two types of receiving: how to receive and unreceive in the NC E-Procurement system.</p> <p><b><i>Please note: This course is NOT available for registration in the NC Learning Center. It is published on the NC E-Procurement <a href="#">website</a>. Please be aware that this training course will only operate with Adobe Flash Player 10 or higher.</i></b></p>
<b>Target Audience</b>	<p>State agency procurement professionals (NCAS users)</p>
<b>Cost</b>	<p>Free</p>
<b>Length</b>	<p>Approximately 3 hrs. 10 mins. (if viewing from beginning to end)</p>
<b>Interested?</b>	<p><b>Begin the receiving process training course <a href="#">here</a>.</b></p>

	<h2 style="text-align: center;">E-Procurement Reporting</h2>
<b>Description</b>	<p>This online course offers participants an overview on the various reports that are available in NC E-Procurement. By the end of this online training course, participants will gain a better understanding of the reporting process and how to filter and save reports.</p> <p><b><i>Please note: This course is NOT available for registration in the NC Learning Center. Both versions of this courses are published on the NC E-Procurement <a href="#">website</a>. Please be aware that these training courses will only operate with Adobe Flash Player 10 or higher.</i></b></p>
<b>Target Audience</b>	<p>State agency, community college, other school system purchasing professionals</p>
<b>Cost</b>	<p>Free</p>
<b>Length</b>	<p>Approximately 1 hr. 9 mins. (if viewing from beginning to end)</p>
<b>Interested?</b>	<p><b>Begin the reporting training course <a href="#">here</a>.</b></p>

	<h2 style="text-align: center;">E-Procurement Requisitioning</h2>
<b>Description</b>	<p>This online course provides steps to create an eRequisition in NC E-Procurement. By the end of this online training course, participants will become familiar with Statewide Term Contract Catalogs and how to edit an existing eRequisition.</p> <p><b><i>Please note: This course is NOT available for registration in the NC Learning Center. Both versions of this course are published on the NC E-Procurement <a href="#">website</a>. Please be aware that these training courses will only operate with Adobe Flash Player 10 or higher.</i></b></p>
<b>Target Audience</b>	<p>State agency, community college, other school system purchasing professionals</p>
<b>Cost</b>	<p>Free</p>
<b>Length</b>	<p>Approximately 3 hrs. 35 mins. (if viewing from beginning to end)</p>
<b>Interested?</b>	<p><b>Begin the requisitioning training course for state agencies <a href="#">here</a>.</b></p>

	<h2 style="text-align: center;">E-Procurement Security Administration</h2>
<b>Description</b>	<p>This online course provides an overview of the security administrator role. By the end of this online course, participants will know how to create address and user maintenance eForms. This includes adding, deleting and updating addresses and user accounts.</p> <p><b><i>Please note: This course is NOT available for registration in the NC Learning Center. It is published on the NC E-Procurement <a href="#">website</a>. Please be aware that this training course will only operate with Adobe Flash Player 10 or higher.</i></b></p>
<b>Target Audience</b>	<p>State agency, community college and school system procurement professionals</p>
<b>Cost</b>	<p>Free</p>
<b>Length</b>	<p>Approximately 3 hrs. 11 mins. (if viewing from beginning to end)</p>
<b>Interested?</b>	<p><b>Begin the security administration training course <a href="#">here</a>.</b></p>

	<h2 style="text-align: center;">E-Procurement System Navigation</h2>
<b>Description</b>	<p>This online course offers an overview of NC E-Procurement. By the end of this online course, participants will be able to operate NC E-Procurement dashboard and the portlets available to customize their dashboard. Participants will also gain a better understanding of the system search fields and labeling transactions.</p> <p><b><i>Please note that this course is NOT available for registration in the NC Learning Center. It is published on the NC E-Procurement <a href="#">website</a>. Please be aware that this training course will only operate with Adobe Flash Player 10 or higher.</i></b></p>
<b>Target Audience</b>	State agency procurement professionals
<b>Cost</b>	Free
<b>Length</b>	Approximately 2 hrs. 44 mins. (if viewing from beginning to end)
<b>Interested?</b>	<b>Begin the system navigation training course <a href="#">here</a>.</b>



# Online Trainings

P&C Website

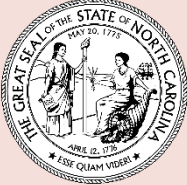


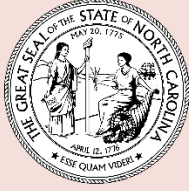
# P&C Online Trainings



## Course Descriptions

P&C offers a diverse list of training materials for purchasers, end-users, and executive leadership on its website, <https://ncadmin.nc.gov/about-doa/divisions/purchase-contract>. To view a list of e-learning, click on the **Online Procurement Training** tile located at the bottom of the home page. For your convenience, a list of P&C e-learning modules are provided below.

 <b>Purchase &amp; Contract</b> Department of Administration	<b>P&amp;C</b> <b>Choosing the Correct Commodity Code</b>
<b>Description</b>	<p>This online module offers an overview of choosing the correct commodity code. By the end of this online module, participants will be able to choose the correct commodity code for their needed good or service. Participants will also be able to test their knowledge with practical exercises to reinforce skills.</p> <p><i><b>Please note that this course is NOT available for registration in the NC Learning Center. It is published on the P&amp;C <a href="#">website</a>.</b></i></p>
<b>Target Audience</b>	State agency procurement professionals and E-Procurement users
<b>Cost</b>	Free
<b>Length</b>	Approximately 20 min. (if viewing from beginning to end)
<b>Interested?</b>	<b>Begin the commodity code training <a href="#">here</a>.</b>



**Purchase & Contract**  
Department of Administration

**P&C**

## **How to Reset Your IPS Password**

### **Description**

This online module offers a tutorial on how to reset your IPS password. Participants will be shown step-by-step instructions on how to change or reset their password in the Interactive Purchasing System.

Note: You must have an IPS account to complete this process.

***Please note that this course is NOT available for registration in the NC Learning Center. It is published on the P&C [website](#).***

### **Target Audience**

State agency procurement professionals and IPS users

### **Cost**

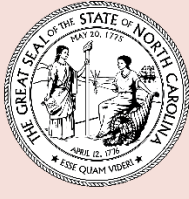
Free

### **Length**

Approximately 10 min. (if viewing from beginning to end)

### **Interested?**

**Begin the IPS password training [here](#).**



**Purchase & Contract**  
Department of Administration

**P&C**

## **Agency Procurement Planning**

### **Description**

This online module offers an overview of the process to submit the agency procurement plan to P&C. By the end of this online module, participants will be able to successfully complete the procurement plan. Participants will also be able to understand what should be recorded in the procurement plan and why P&C is asking agencies to submit this form.

***Please note that this course is NOT available for registration in the NC Learning Center. It is published on the P&C [website](#).***

### **Target Audience**

State agency procurement professionals

### **Cost**

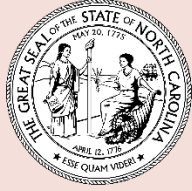
Free

### **Length**

Approximately 15 min. (if viewing from beginning to end)

### **Interested?**

**Begin the procurement planning training [here](#).**



**Purchase & Contract**  
Department of Administration

**P&C**

## **Preliminary Review of Service Solicitations**

### **Description**

This online module offers an overview of the process with the preliminary service review form. By the end of this online module, participants will be able to navigate and complete the preliminary service review form found on the P&C website under Forms and Documents. Participants will also understand what solicitations should and should not be submitted using this form.

***Please note that this course is NOT available for registration in the NC Learning Center. It is published on the P&C [website](#).***

### **Target Audience**

State agency procurement professionals

### **Cost**

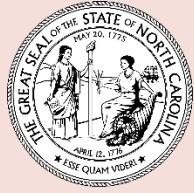
Free

### **Length**

Approximately 15 min. (if viewing from beginning to end)

### **Interested?**

**Begin the preliminary service review training [here](#).**



**Purchase & Contract**  
Department of Administration

**P&C**

## **Executive Leadership: Procurement Basics**

### **Description**

This online module offers a high-level overview of the procurement process. By the end of this online module, participants will be able to understand some of the main rules and regulations that govern state purchasing for North Carolina. Participants will also have a better understanding about how the process of state procurement works.

***Please note that this course is NOT available for registration in the NC Learning Center. It is published on the P&C [website](#).***

### **Target Audience**

Executive Leadership involved with purchasing goods or services

### **Cost**

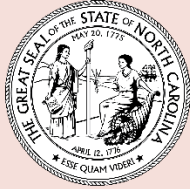
Free

### **Length**

Approximately 30 min. (if viewing from beginning to end)

### **Interested?**

**Begin the executive leadership training [here](#).**



**Purchase & Contract**  
Department of Administration

**P&C**  
**Inspection Series**  
**Inspection Introduction**

**Description**

This first online module in the Inspection Series offers an overview of the inspection process. By the end of this online module, participants will be able to navigate through the main parts of an inspection. Participants will also be able to understand the different types of inspections, how to prepare for an inspection, and how to document the inspection process.

Note: We strongly recommend that the 4 modules of the Inspection Series be completed in order to achieve the best learning experience.

***Please note that this course is NOT available for registration in the NC Learning Center. It is published on the P&C [website](#).***

**Target Audience**

State agency procurement professionals and agency inspectors

**Cost**

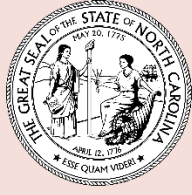
Free

**Length**

Approximately 10 min. (if viewing from beginning to end)

**Interested?**

**Begin the inspection introduction training [here](#).**



**Purchase & Contract**  
Department of Administration

## **P&C**

### **Inspection Series**

### **Tier 2 Inspections**

#### **Description**

This second online module in the Inspection Series offers an overview of Tier 2 inspections. By the end of this online module, participants will have a better understanding of what commodities may require a more extensive, Tier 2 inspection. Participants will also be able to understand how to inspect more complex commodities to ensure they conform to specifications and all safety standards.

Note: We strongly recommend that the 4 modules of the Inspection Series be completed in order to achieve the best learning experience.

***Please note that this course is NOT available for registration in the NC Learning Center. It is published on the P&C [website](#).***

#### **Target Audience**

State agency procurement professionals and agency inspectors

#### **Cost**

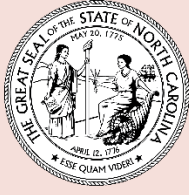
Free

#### **Length**

Approximately 10 min. (if viewing from beginning to end)

#### **Interested?**

**Begin the Tier 2 inspections training [here](#).**



**Purchase & Contract**  
Department of Administration

**P&C**  
**Inspection Series**  
**Commodity Specific Inspection**  
**Examples**

**Description**

This third online module in the Inspection Series offers specific examples of commodities and what to look for when inspecting. By the end of this online module, participants will have a better idea of some of the characteristics to check for when inspecting specific commodities. Participants will gain a better understanding of how to conduct inspections.

Note: Keep in mind that the commodities in this module are just examples and in no way cover everything that should be checked for every inspection.

Note: We strongly recommend that the 4 modules of the Inspection Series be completed in order to achieve the best learning experience.

***Please note that this course is NOT available for registration in the NC Learning Center. It is published on the P&C [website](#).***

**Target Audience**

State agency procurement professionals and agency inspectors

**Cost**

Free

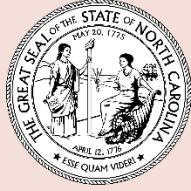
**Length**

Approximately 10 min. (if viewing from beginning to end)

**Interested?**

**Begin the commodity example training [here](#).**





**Purchase & Contract**  
Department of Administration

**P&C**  
**Inspection Series**  
**Inspections Pass, Fail, Re-inspect**

**Description**

This final online module in the Inspection Series offers an overview of the process for passing, failing, and re-inspecting commodities. By the end of this online module, participants will be able to decide what the process should be for a commodity that fails inspection and needs to be re-inspected. Participants will also be able to understand the process for documentation when a commodity passes inspection.

Note: We strongly recommend that the 4 modules of the Inspection Series be completed in order to achieve the best learning experience.

***Please note that this course is NOT available for registration in the NC Learning Center. It is published on the P&C [website](#).***

**Target Audience**

State agency procurement professionals and agency inspectors

**Cost**

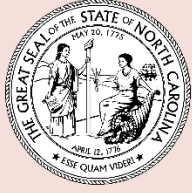
Free

**Length**

Approximately 10 min. (if viewing from beginning to end)

**Interested?**

**Begin the pass, fail, and re-inspect training [here](#).**



**Purchase & Contract**  
Department of Administration

**P&C**  
**NC BIDS**  
**NC BIDS for Agencies**

**Description**

This online module offers an overview of the NC BIDS process through IPS. By the end of this online module, participants will have a better understanding of how to view Vendor responses electronically through the new NC BIDS system. Participants will also be able to understand how electronic bid responses will be viewed and downloaded to store at the agency.

Note: NC BIDS will be implemented for all agencies in phases and the function will not appear for your agency until NC BIDS is activated.

***Please note that this course is NOT available for registration in the NC Learning Center. It is published on the NCBIDS [website](#).***

**Target Audience**

IPS users

**Cost**

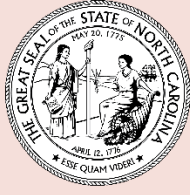
Free

**Length**

Approximately 15 min. (if viewing from beginning to end)

**Interested?**

**Begin the NC BIDS training [here](#).**



**Purchase & Contract**  
Department of Administration

## **P&C** **NC BIDS**

### **Posting a Bid Using NC BIDS**

#### **Description**

This online module offers an overview of how to post a bid in IPS with the new NC BIDS system. By the end of this online module, participants will be able to successfully post a bid that Vendors can submit responses to electronically. Participants will also understand how to make it clear to Vendors if the agency is accepting only electronic, only paper, or both types of bid responses.

Note: NC BIDS will be implemented for all agencies in phases and the function will not appear for your agency until NC BIDS is activated.

***Please note that this course is NOT available for registration in the NC Learning Center. It is published on the NCBIDS [website](#).***

#### **Target Audience**

IPS users

#### **Cost**

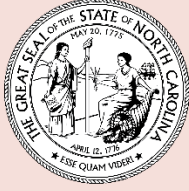
Free

#### **Length**

Approximately 15 min. (if viewing from beginning to end)

#### **Interested?**

**Begin the NC BIDS training [here](#).**



**Purchase & Contract**  
Department of Administration

**P&C**

## **NC Procurement Certification**

### **Description**

This online module offers an overview of the newly-released North Carolina procurement certification program. Participants will learn about the certification pathways (North Carolina Contract Manager, North Carolina Purchaser, North Carolina Purchasing Officer) currently offered and proposed through the North Carolina Procurement Academy.

Note: You must have an IPS account to complete this process.

***Please note that this course is NOT available for registration in the NC Learning Center. It is published on the P&C [website](#).***

### **Target Audience**

State agency procurement and contract management professionals.

### **Cost**

Free

### **Length**

Approximately 35 min. (if viewing from beginning to end)

### **Interested?**

**Begin the IPS password training [here](#).**

## 2019 Course Schedule

<u>Date</u>	<u>Course Title</u>	<u>Location</u>	<u>Facility &amp; Address</u>
<b>January 3</b>	E-Procurement	Raleigh NC	Wake Tech Public Education Campus
<b>January 8-10</b>	Introduction to Procurement	Raleigh NC	116 W. Jones Street P&C Training Room (G111)
<b>January 24</b>	Specification Writing	Raleigh NC	116 W. Jones Street P&C Training Room (G111)
<b>January 29</b>	E-Procurement	Raleigh NC	Wake Tech Public Education Campus
<b>February 12-14</b>	Request for Proposal	Raleigh NC	116 W. Jones Street P&C Training Room (G111)
<b>February 19</b>	E-Procurement	Raleigh NC	Wake Tech Public Education Campus
<b>February 26</b>	Contract Administration	Raleigh NC	116 W. Jones Street P&C Training Room (G111)
<b>February 26</b>	E-Procurement	Raleigh NC	Wake Tech Public Education Campus
<b>March 5</b>	E-Procurement	Raleigh NC	Wake Tech Public Education Campus
<b>March 7</b>	Demystifying Terms and Conditions	Raleigh NC	116 W. Jones Street P&C Training Room (G111)
<b>March 12-14</b>	Introduction to Procurement	Raleigh NC	116 W. Jones Street P&C Training Room (G111)
<b>March 19</b>	E-Procurement	Raleigh NC	Wake Tech Public Education Campus
<b>March 27</b>	Specification Writing	Raleigh NC	116 W. Jones Street P&C Training Room (G111)
<b>April 2-4</b>	Request for Proposal	Raleigh NC	116 W. Jones Street P&C Training Room (G111)
<b>April 10</b>	E-Procurement	Raleigh NC	Wake Tech Public Education Campus
<b>April 18</b>	Contract Administration	Raleigh NC	116 W. Jones Street P&C Training Room (G111)
<b>April 23</b>	E-Procurement	Raleigh NC	Wake Tech Public Education Campus
<b>May 14</b>	E-Procurement	Raleigh NC	Wake Tech Public Education Campus
<b>June 18</b>	E-Procurement	Raleigh NC	Wake Tech Public Education Campus
<b>June 20</b>	Demystifying Terms and Conditions	Raleigh NC	116 W. Jones Street P&C Training Room (G111)
<b>June 26</b>	E-Procurement	Raleigh NC	Wake Tech Public Education Campus

<b>July 10</b>	E-Procurement	Raleigh NC	Wake Tech Public Education Campus
<b>July 16-18</b>	Introduction to Procurement	Raleigh NC	116 W. Jones Street P&C Training Room (G111)
<b>July 17</b>	E-Procurement	Raleigh NC	Wake Tech Public Education Campus
<b>July 31</b>	Specification Writing	Raleigh NC	116 W. Jones Street P&C Training Room (G111)
<b>August 6</b>	E-Procurement	Raleigh NC	Wake Tech Public Education Campus
<b>August 21</b>	E-Procurement	Raleigh NC	Wake Tech Public Education Campus
<b>September 4</b>	E-Procurement	Raleigh NC	Wake Tech Public Education Campus
<b>September 24</b>	E-Procurement	Raleigh NC	Wake Tech Public Education Campus
<b>September 25</b>	Demystifying Terms and Conditions	Raleigh NC	116 W. Jones Street P&C Training Room (G111)
<b>October 3</b>	E-Procurement	Raleigh NC	Wake Tech Public Education Campus
<b>October 16</b>	E-Procurement	Raleigh NC	Wake Tech Public Education Campus
<b>November 6</b>	E-Procurement	Raleigh NC	Wake Tech Public Education Campus
<b>November 19</b>	E-Procurement	Raleigh NC	Wake Tech Public Education Campus
<b>December 5</b>	E-Procurement	Raleigh NC	Wake Tech Public Education Campus
<b>December 10</b>	E-Procurement	Raleigh NC	Wake Tech Public Education Campus