NC eProcurement

Collaborative Requisitioning

Collaborative Requisitioning is the informal quoting and pricing request function within the NC eProcurement system. When purchasing quantities of items over the typical purchasing threshold for normal buying policies, but under the threshold for a formal bidding process, users can use Collaborative Requisitions to obtain quotes for goods and services from multiple vendors at the same time.

Collaborations are started on individual line items on a Purchase Requisition (PR), meaning that on a PR containing multiple line items, you can have both collaborative and non-collaborative items as required. In addition, Collaboration can only be enabled while in Expert View.

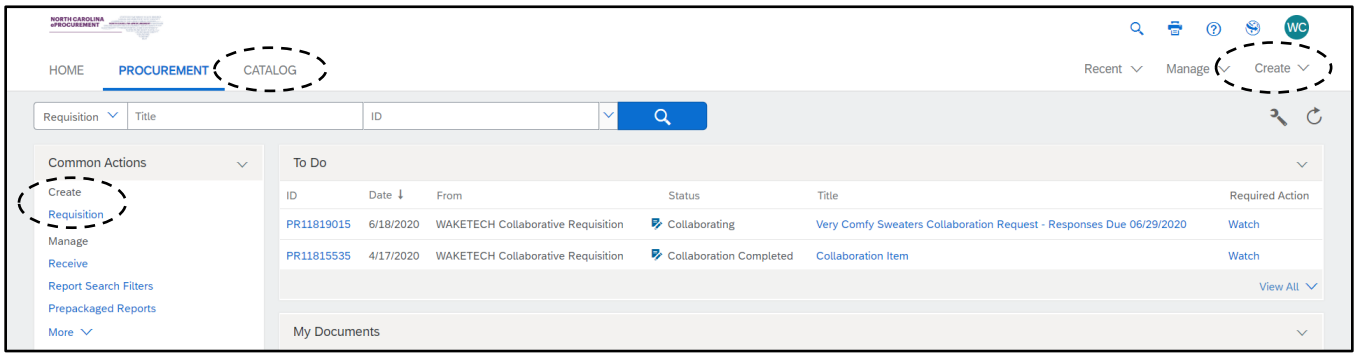
Note: The monetary thresholds for informal and formal bidding processes are dictated by your purchasing department. Consult your purchasing director if there are questions about when to use either process.

I. Entering Item Details

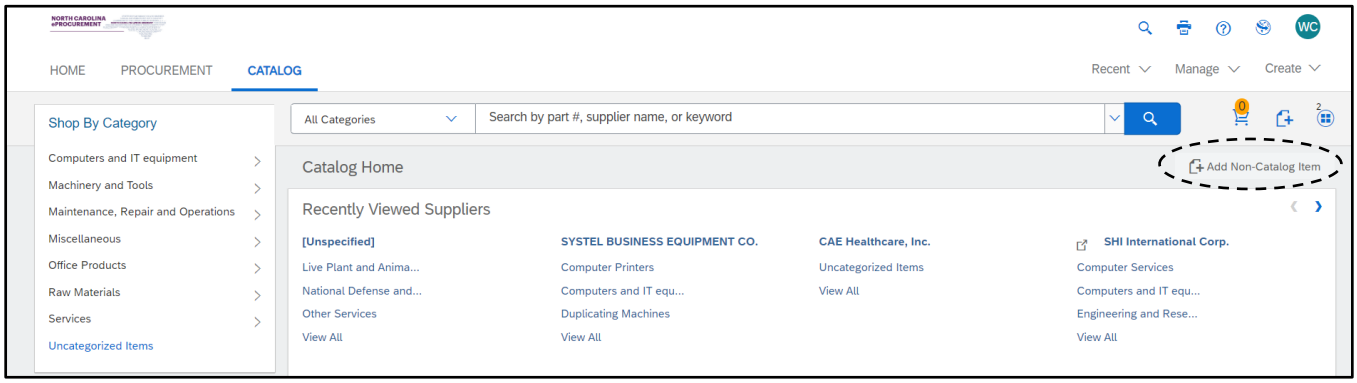
Before starting collaboration with vendors, users will need to create a non-catalog item. To begin the process, users will need both the ability to create Purchase Requisitions (PRs) as well as the correct permissions to Enable Collaboration with vendors.

Note: Approvers with the **Edit** capability that would like to enable Collaboration on an already submitted PR, please move to Section 3: Enabling Collaboration as an Approver.

1. In Expert View, navigate to the Catalog by either selecting the tab on the top of the screen, or by using the **'Create'** drop-down menu and selecting **'Requisition.'**



2. In the upper right of the Catalog, select **'Add Non-Catalog Item.'**



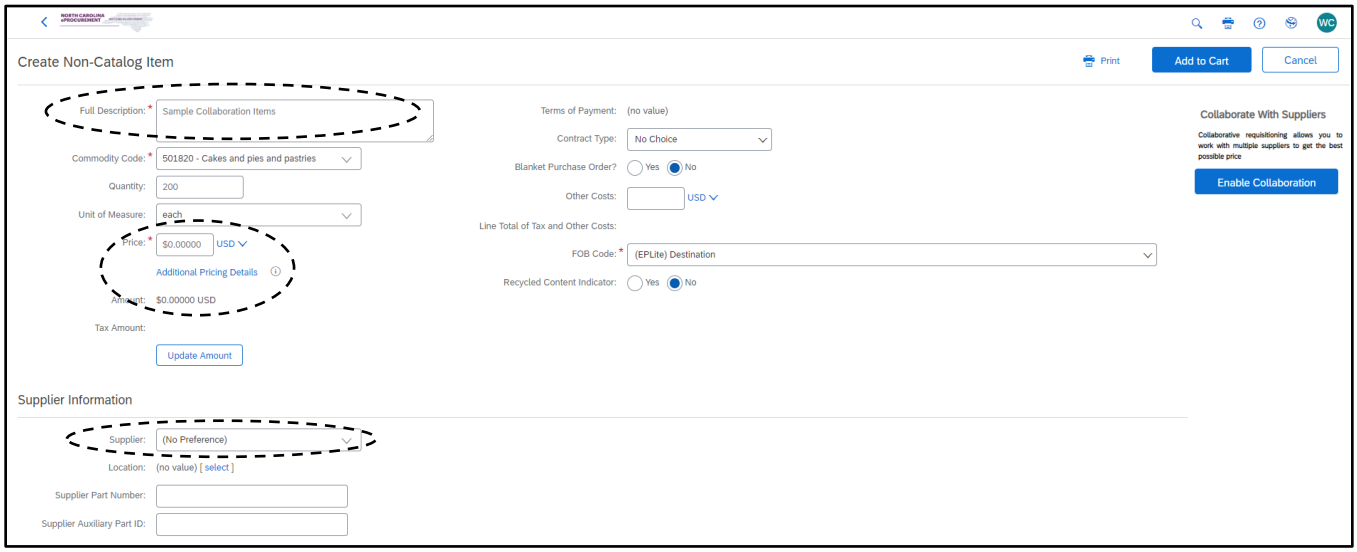
3. Fill in all required line item details.

    a. When creating a Collaborative line item, users should leave the **'Price'** field at $0.

    b. Leave the Supplier field blank. Suppliers will be selected after enabling Collaboration.

    c. Make sure that the 'Description' has all details that a vendor will need in order to give you an accurate quote for the goods or services being requested.

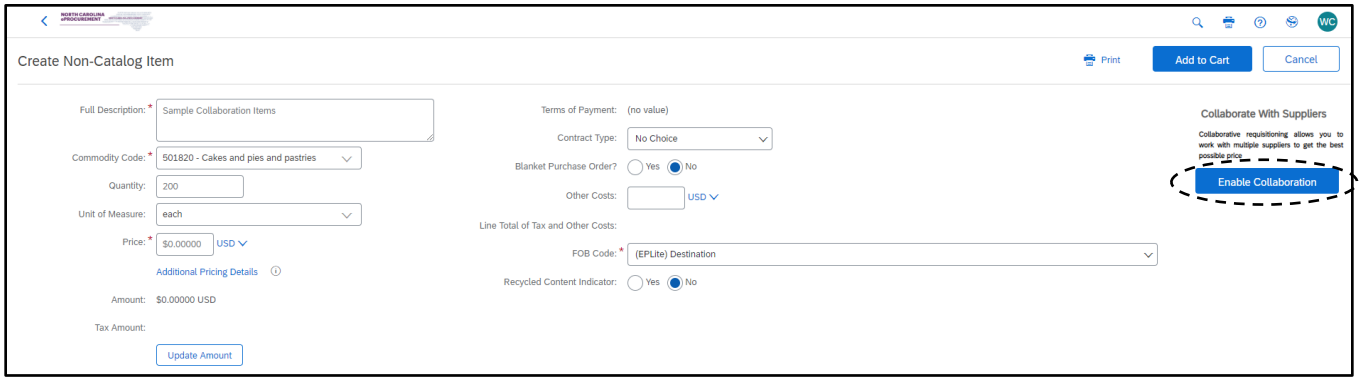
Note: For more information on line item creation, please reference the Expert View Purchase Requisitions guide.



II. Beginning Collaboration as the Requester

Enabling Collaboration can **only** be done in Expert View. Enablement can be started on a new Purchase Requisition (PR), or on a Submitted PR that falls under the purchasing policy requirements to solicit quotes from vendors.

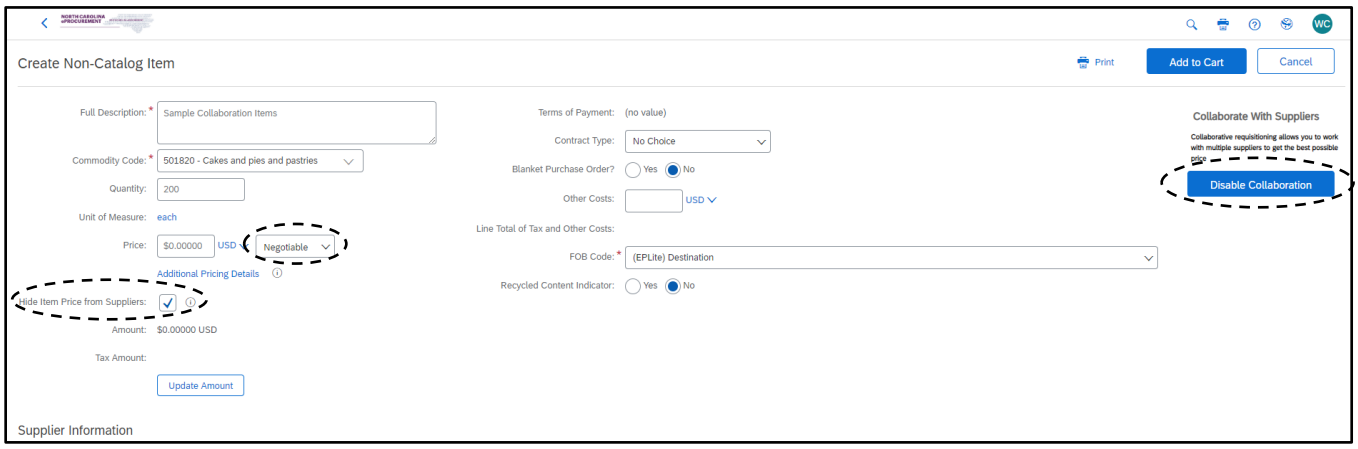
1. On a newly created Non-Catalog Item, click the blue **'Enable Collaboration'** button on the right side of the screen to start the Collaboration process.



2. Once selected, the button will change to read **'Disable Collaboration,'** letting you know the Collaboration process has begun.

    a. Next to the **'Price'** field, a drop-down menu will appear. Leave this option on the default value **'Negotiable.'**

    b. Another new field, **'Hide Item Price from Suppliers,'** is located below Price. Check the box on this field to mask the item's unit price from vendors while they are participating in Collaboration.



3. To invite Suppliers to Collaborate, click the revealed **'Change'** button in the Supplier Information section.

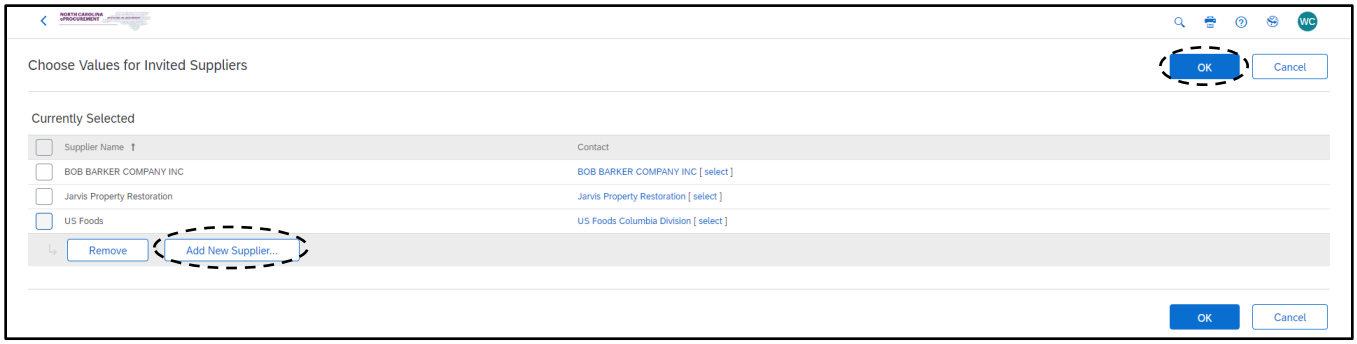
4. On the next page, click **'Add New Supplier…'** to open the list of currently active NC eProcurement vendors in the system.

    a. To search, type the full or partial company name for a vendor listed in the electronic Vendor Portal (eVP). Any misspellings in the search will bring back incorrect or no results at all.

        i. To search for vendors using more company registration information, please see Section IV: Using eVP to Find Vendors. Some information, such as vendors with HUB status information, can also be found in the Supplier Search before enabling Collaboration.

    b. Choose a vendor to request Collaboration with by clicking the **'Select'** button to the right, or click **'Done'** to close the pop-up.

    c. Add suppliers using the **'Add New Supplier…'** button until purchasing requirements are met and click **'OK'** to go back to the line item page.



5. Confirm that the selected suppliers now appear under the Supplier Information section.

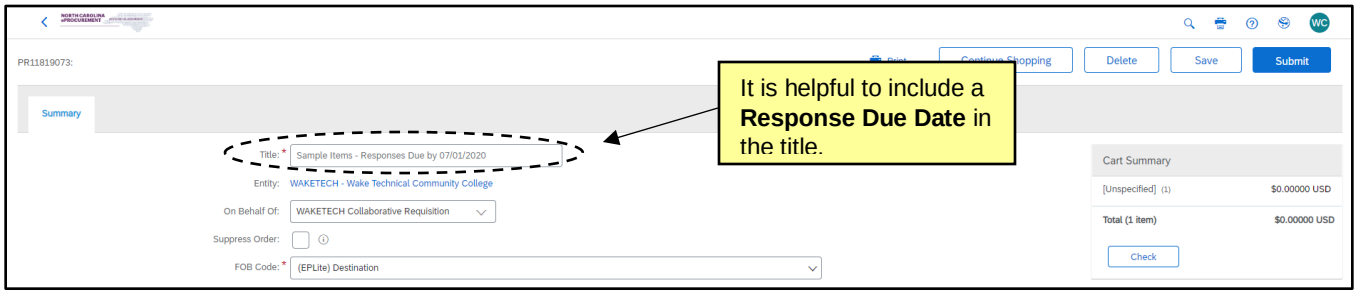
6. Under the Supplier Information section, set the **'Bidding Type'** drop-down to **'Open – Amount'** to enable vendors to see the winning quote once Collaboration is completed.

Note: Do not create a **'New'** bidding type as that may cause system issues.

7. When the line is ready to be submitted, click **'Add to Cart.'**

8. Click 'Proceed to Checkout' to go to the PR Summary page.

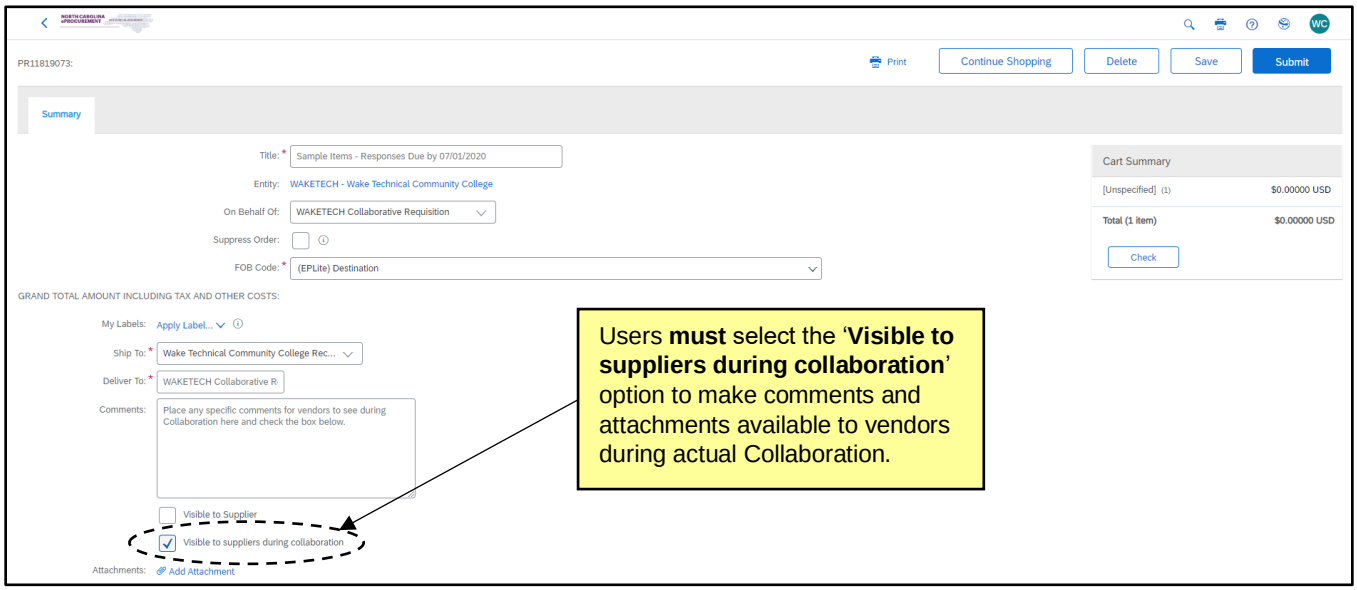
9. When titling the PR, make sure to put a Response Due Date in the title, e.g. “Sample Items – **Responses Due By 07/01/2020**” to inform the vendor when quotes are due for submission. There is no Due Date field in Collaborative Requisitioning.



10. Comments and attachments can be added on the Summary tab. Designs, additional details, or specific terms and conditions can be linked in the comments or attached. For example, IT purchases may require additional language or information - NCDIT IT Procurement Forms & Templates

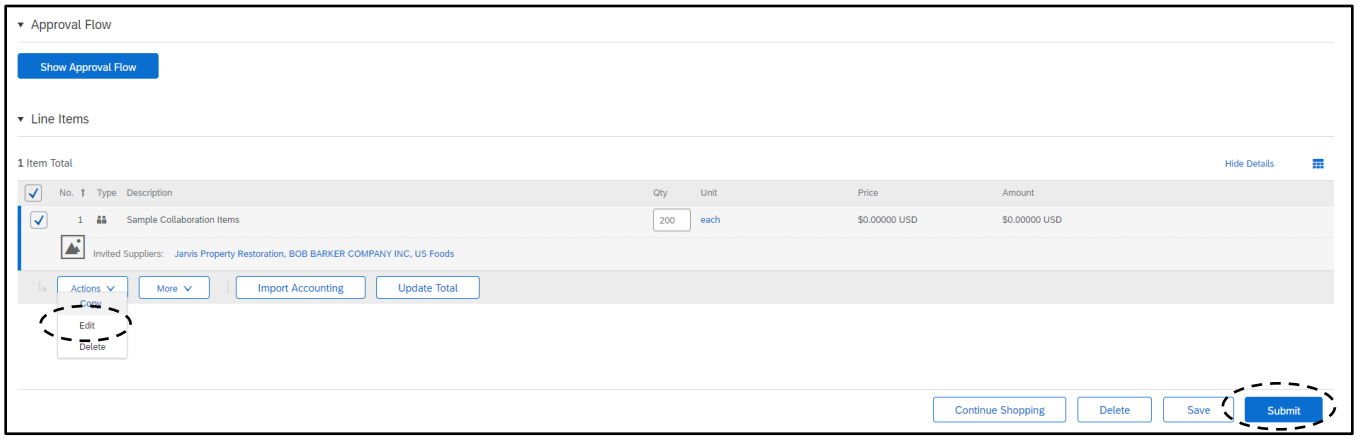
    a. Selecting the ‘**Visible to supplier**’ option will send comments and attachments to vendors after the PR is fully approved, **after Collaboration is completed.**

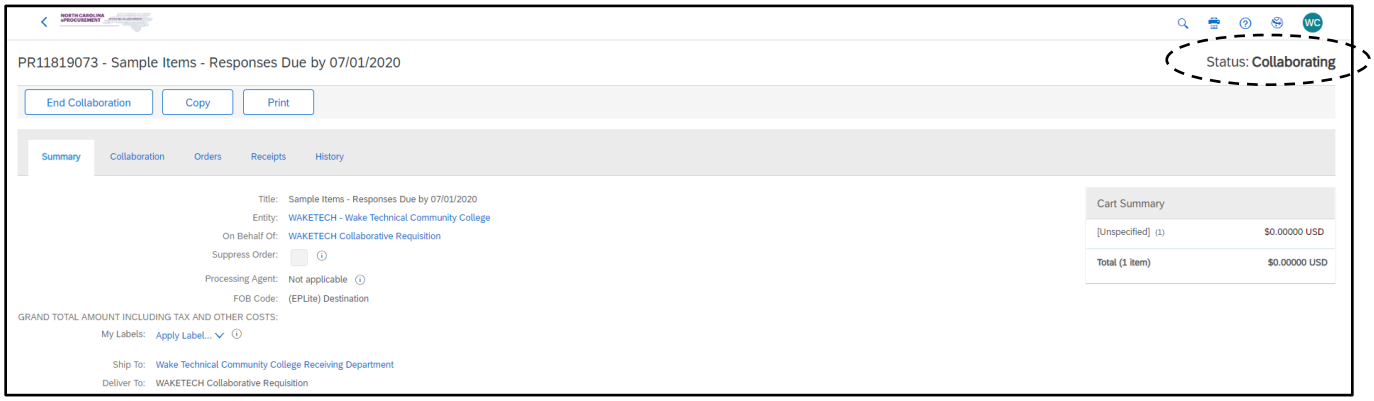
    b. To make comments and attachments available to vendors **during Collaboration**, check the ‘**Visible to supplier during collaboration**’ box.



11. Navigate down to the line item on the Summary page, check the box next to the line item going into Collaboration, and use the **‘Actions’** drop-down to Edit the line and add accounting information, then click **‘Ok’** to go back to the PR Summary screen.

12. Once all required fields are filled out, press **'Submit.'** Depending on the approval flow for your entity, the order will either move into Submitted or Collaborating status.





Note: Orders that do not move into Collaborating status after clicking 'Submit' may need additional approval before being sent out for Collaboration. Check the Approval Flow to see how many approvals are required before the PR reaches Collaboration status.

III. Enabling Collaboration as an Approver

As an Approver, enabling Collaboration can only be done in Expert View. Approvers will need both the ability to edit submitted Purchase Requisitions (PRs) as well as begin Collaboration on a submitted line item. Not all users will have both or either capabilities.

For further information on approving and editing line items, please see 'Approving a Requisition.'

1. In Expert View, select the PR either the **'ID,' 'Title,'** or **'Approve'** link, then click the **'Edit'** button.

2. Scroll down to the line items on the Summary page, check the box next to the line that needs Collaboration with vendors, and use the **'Actions'** drop-down to select **'Edit Details.'**

3. In the upper right of the line item details page, select the **'Yes'** radio button next to the **'Collaborate with supplier(s) for this item'** field.

4. Once selected, several fields will be added to the line item details, and the Invited Suppliers section will appear on the right.

   a. Set the **'Price'** field to $0.

   b. Next to the **'Price'** field, a drop-down menu will appear. Leave this option on the default value **'Negotiable.'**

   c. Another new field, **'Hide Item Price from Suppliers,'** is located below Price. Check the box on this field to mask the item's unit price from vendors while they are participating in Collaboration.

5. To invite Suppliers to Collaborate, click the revealed **'Change'** button in the Supplier Information section.

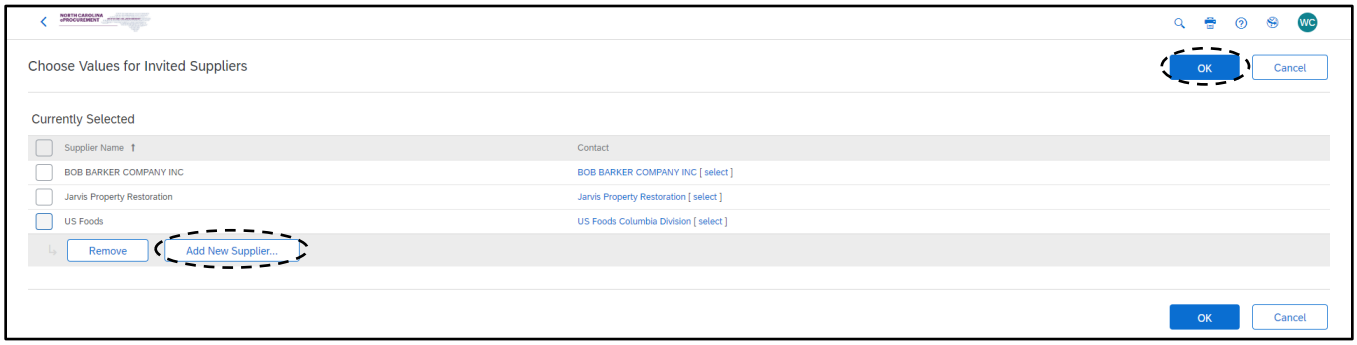
6. On the next page, click **'Add New Supplier…'** to open the list of currently active NC eProcurement vendors in the system.

   a. To search, type the full or partial company name for a vendor listed in the electronic Vendor Portal (eVP). Any misspellings in the search will bring back incorrect or no results at all.

      i. To search for vendors using more company registration information, please see Section IV: Using eVP to Find Vendors. Some information, such as vendors with HUB status information, can also be found in the Supplier Search before enabling Collaboration.

   b. Choose a vendor to request Collaboration with by clicking the **'Select'** button to the right or click **'Done'** to close the pop-up.

c. Add suppliers using the **'Add New Supplier…'** button until purchasing requirements are met and click **'OK'** to go back to the line item page.

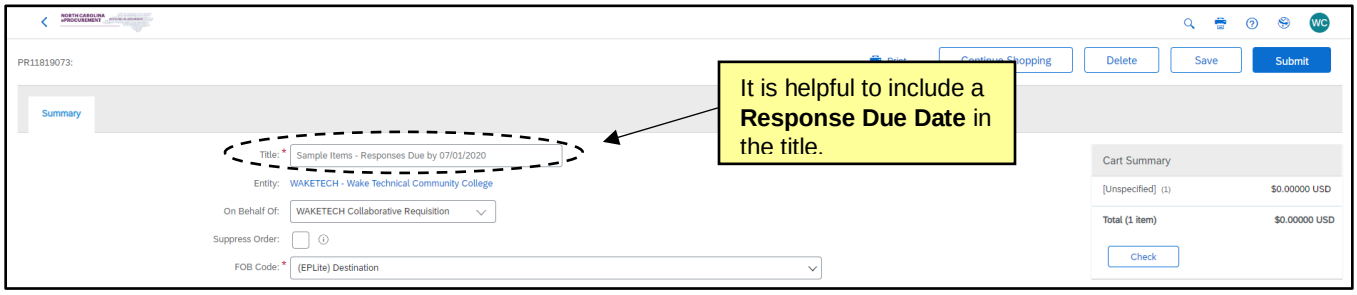


7. Confirm that the selected suppliers now appear under the Supplier Information section.

8. Under the Supplier Information section, set the **'Bidding Type'** drop-down to 'Open – Amount' to enable vendors to see the winning quote once Collaboration is completed.

9. When finished with editing the line item details, click **'OK'** to return to the PR Summary page.

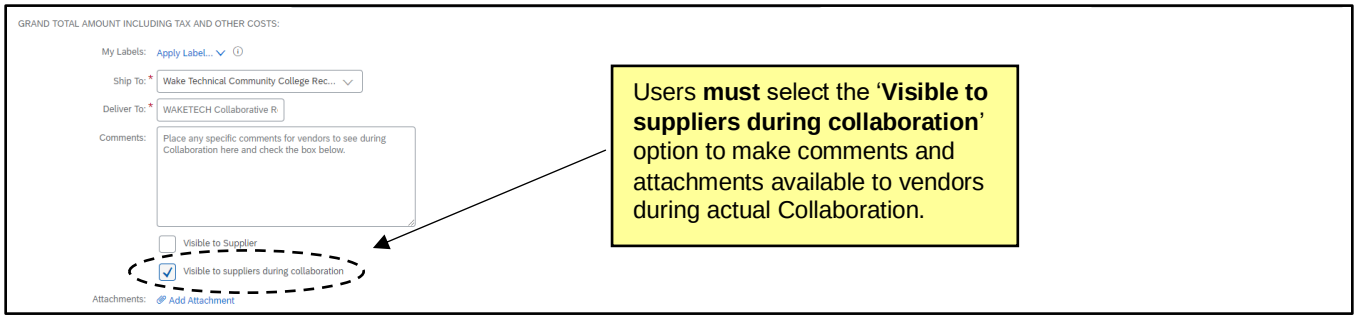
10. When titling the PR, make sure to put a Response Due Date in the title, e.g. "Sample Items – **Responses Due By 07/01/2020**" to inform the vendor when quotes are due for submission. There is no Due Date field in Collaborative Requisitioning.



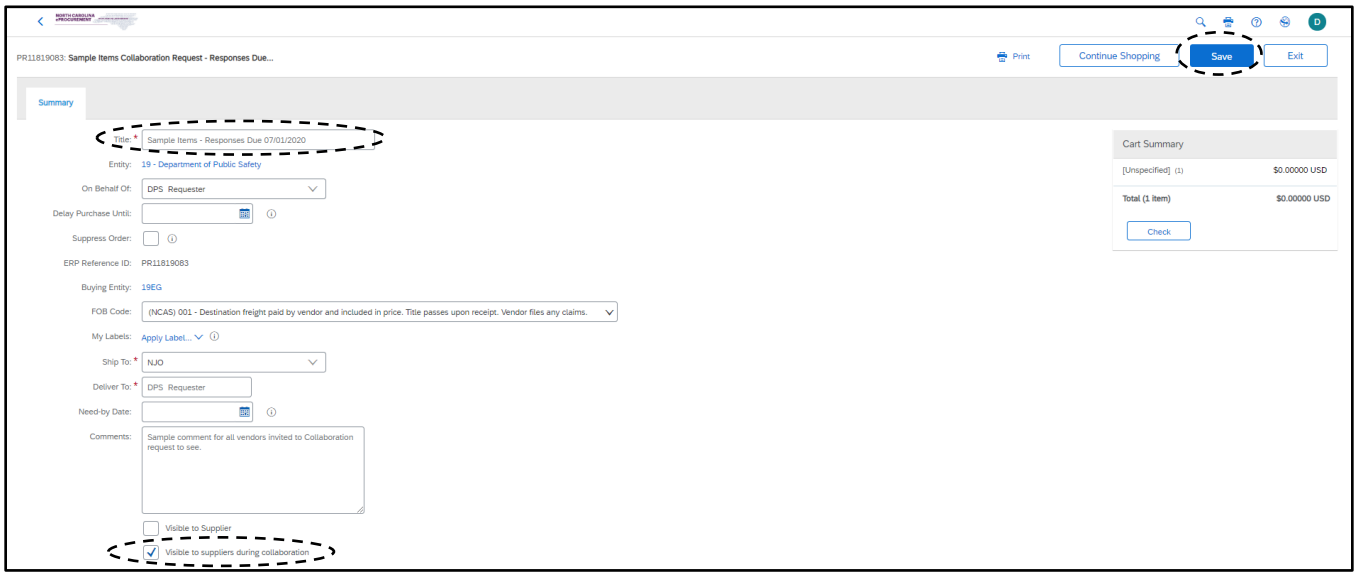
11. Comments and attachments can be added on the Summary tab. Designs, additional details, or specific terms and conditions can be linked in the comments or attached. For example, IT purchases may require additional language or information - [NCDIT IT Procurement Forms & Templates]

    a. Selecting the '**Visible to supplier**' option will send comments and attachments to vendors after the PR is fully approved, **after Collaboration is completed.**

    b. To make comments and attachments available to vendors **during Collaboration**, check the '**Visible to supplier during collaboration**' box.



12. Once all required fields are updated to include the new Collaboration details, press **'Save.'** Depending on the approval flow for your entity, the order will either move into Submitted or Collaborating status.



13. To view the updated PR, use the 'Recently Viewed' portlet on the Procurement tab.

Note: Orders that do not move into Collaborating status after clicking **'Submit'** may need additional approvals before being sent out for Collaboration. Check the Approval Flow to see how many approvals are required before the PR reaches the Collaboration step.

IV. Using eVP to Find Vendors

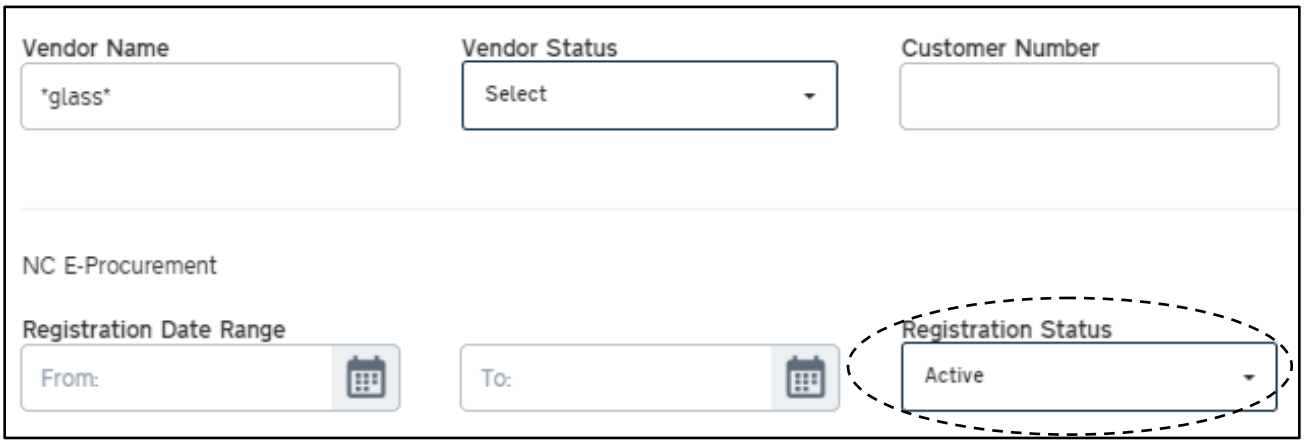
Before creating a Collaborative Requisition, users may need to find active eProcurement vendors that provide the goods and/or services being requested. The electronic Vendor Portal (eVP) Public Vendor Search is a convenient way to find and filter active vendors in the system capable of receiving Collaboration requests.

A video walkthrough on Searching for Registered Vendors is also available on the eProcurement website: Searching for Registered Vendors.

1. Navigate to the Public Vendor Search. Users can also use the 'Public Vendor Search' tile link on the eProcurement website.

2. If the vendor's name is known, populate the vendor name in the Search field.

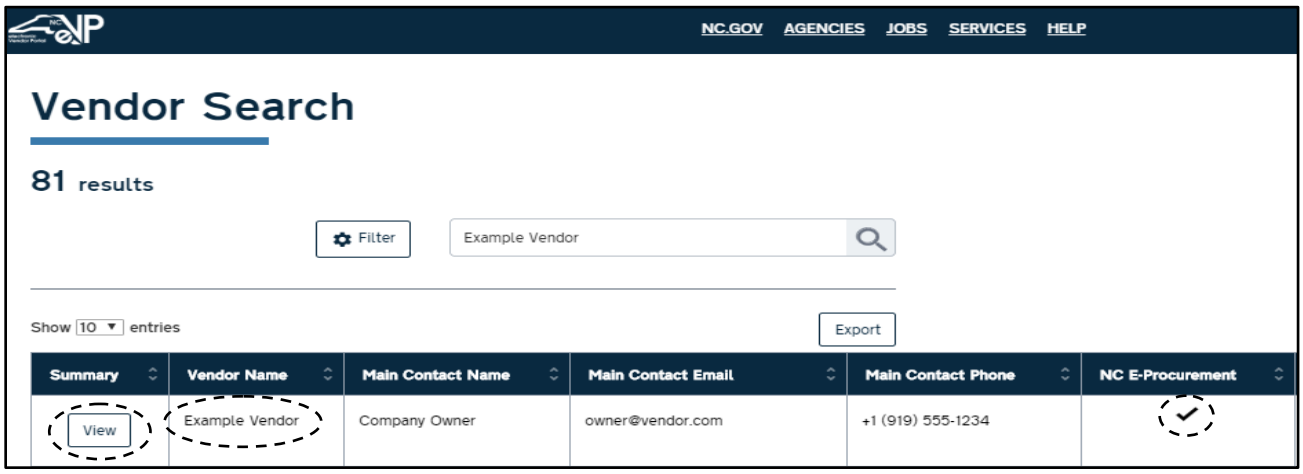
3. Click the '**Filter**' button and select **'Active'** in the **'Registration Status'** drop-down within the **'NC E-Procurement'** section (not the **'IPS'** section below it or the general **'Vendor Status'** drop-down above it) to return only vendors who are currently active and able to accept purchase orders.



4. Click the magnifying glass to initiate the search.

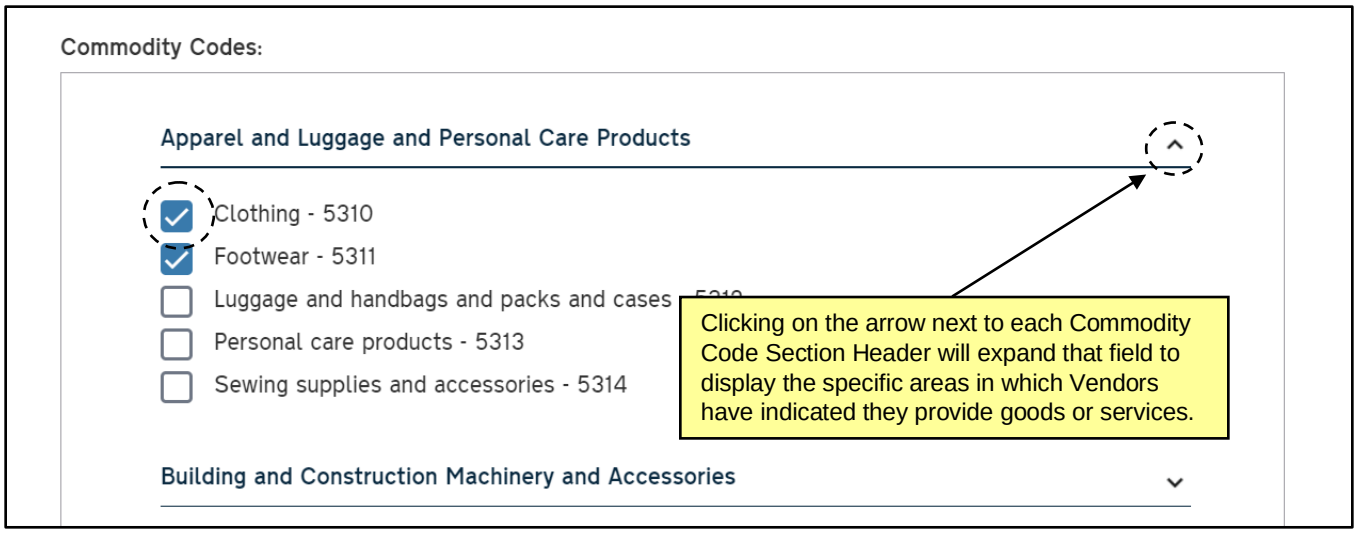
5. Click **"View"** in the **"Summary"** column of the desired Vendor to see more information.

Note: When selecting vendors for Collaboration, use the **exact** Vendor Name listed in the Public Vendor Search.



6. Vendors who have indicated they provide certain types of goods or services can be searched for based on related commodity codes.

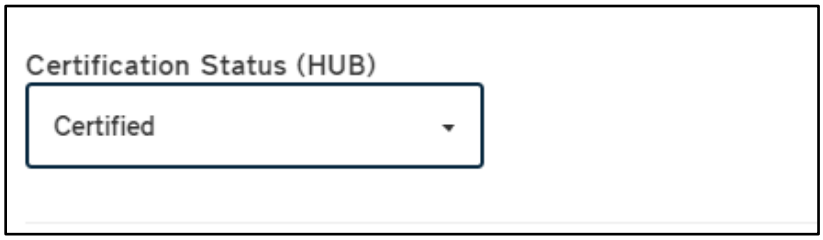
   a. Scroll down the screen below the drop-down and free-text filters to the **'Commodity Codes:'** section. By expanding the arrows next to each heading, you can select areas in which Vendors have indicated they provide specific goods or services



7. Once all relevant commodity codes have been selected, a search can be executed by selecting the **'Apply'** button at the top of the page.

8. Additional search filters can be used to search by specific criteria in order to find more focused results.

    a. Select **'Certified'** in the **'Certification Status (HUB)'** drop-down beneath the **'IPS'** section will filter results to include only vendors who are currently Certified as a Historically Underutilized Business (HUB).

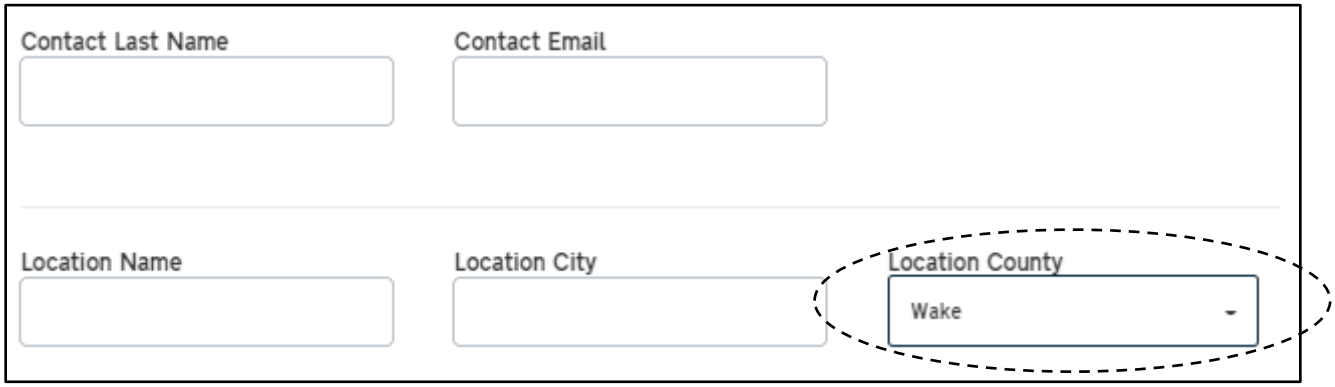


    b. Further down the page, there are five filters that can help target specific vendors by contact or geographical location.

        i. If vendor contact information is known, the **'Contact Last Name'** or **'Contact Email'** can be entered to return the associated vendor account.

        ii. Selecting a specific County from the **'Location County'** drop-down will return only vendors who have entered an address located in that county. The **'Location City'** filter is a free-text field into which even more specific localized information can be entered.

        Note: Filtering by County only works for North Carolina based vendors.



9. Use a combination of fields to find vendors to begin Collaboration with.

    a. Using fewer fields may result in more vendors, but less accurate results.

    b. Users should contact vendors to confirm that they offer the requested goods/services before sending a Collaboration request.

Note: All vendors registered to receive purchase orders can be selected for Collaboration requests, but in order to respond to the request they will need to register for an Ariba Network supplier account. Vendors with questions on the Ariba Network account creation process should contact the vendor Help Desk.

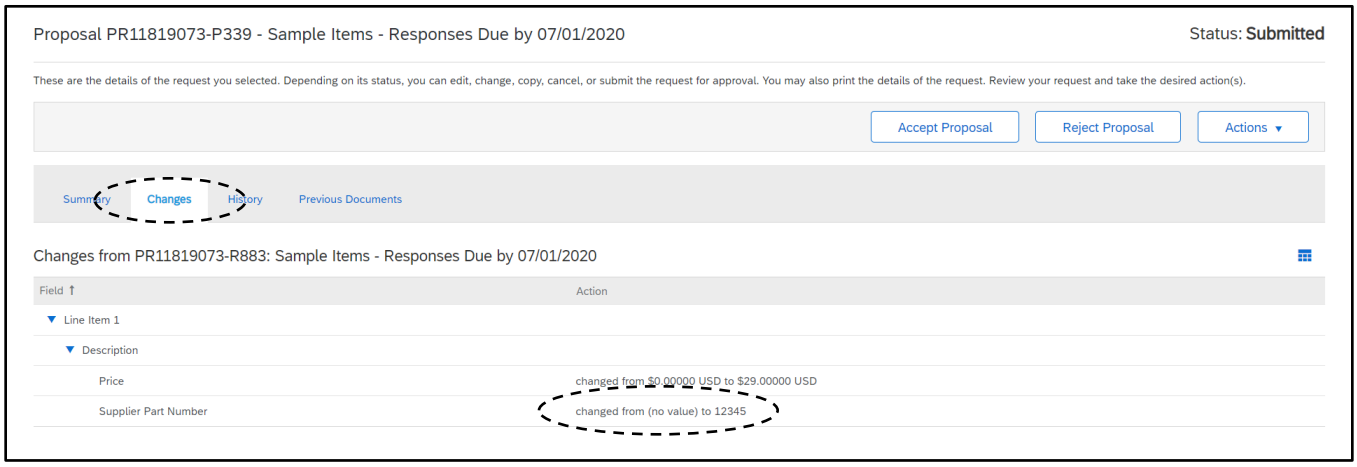
V. Handling Substitute Items

Vendors may not provide, or have available in their inventory, the goods/services being requested. In this event, vendors may offer the requester an equivalent substitute instead.

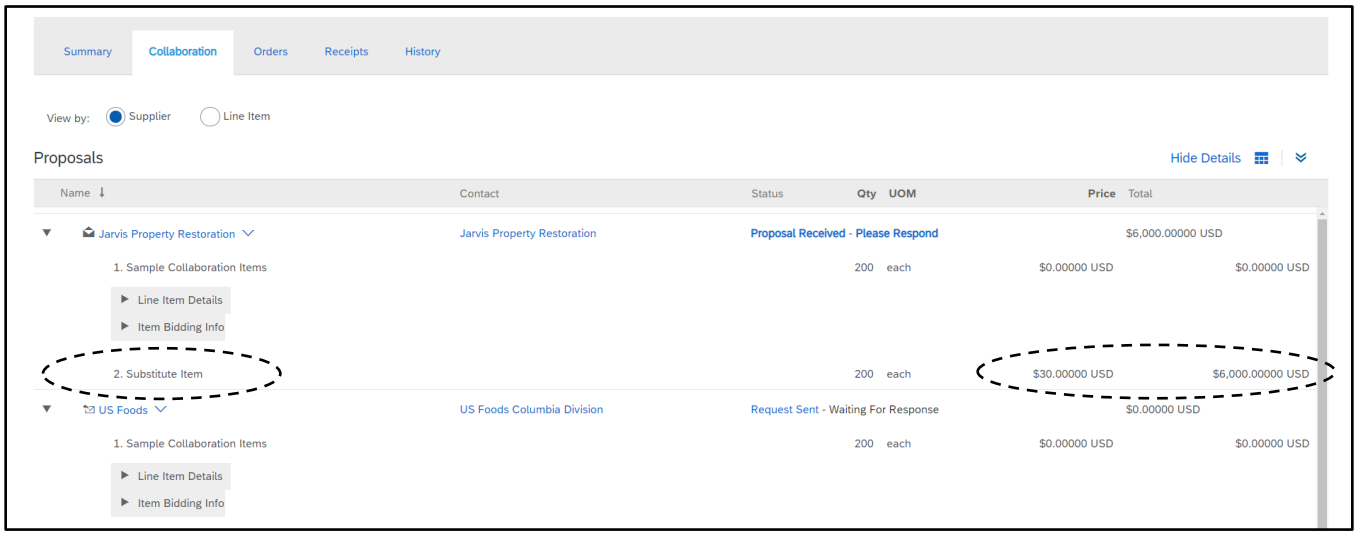
1. If a vendor would like to offer a substitute item, they may edit the line item details, part number, and quantity in addition to offering a price without informing the buyer beforehand.

    a. When reviewing Collaboration responses, covered in Section VII: Finishing Collaboration, be sure that all details match up to the original Collaboration request.

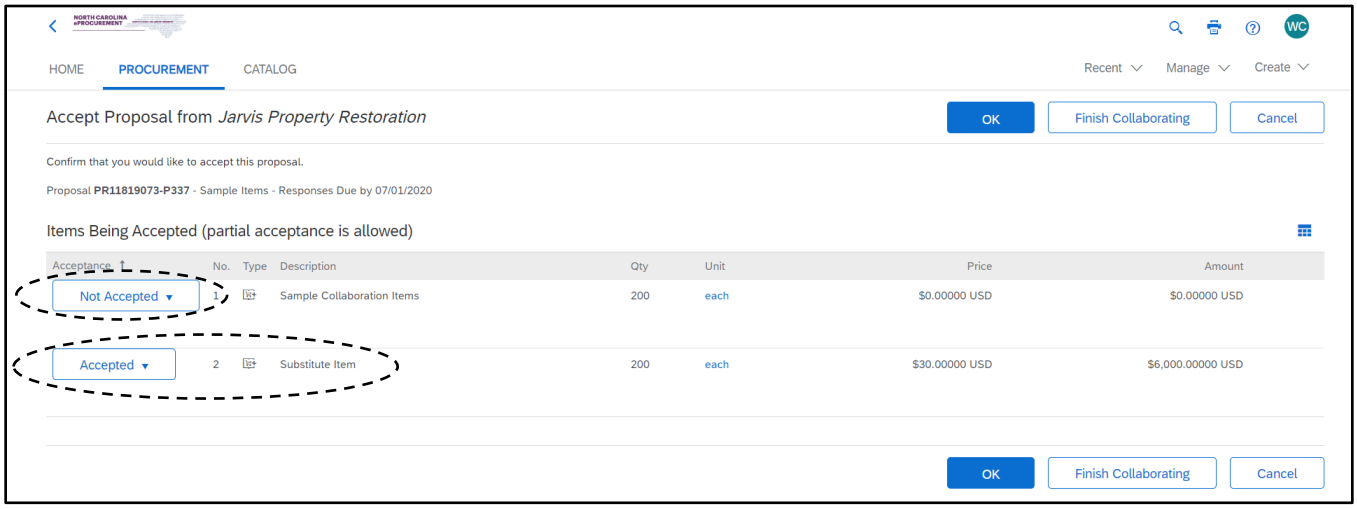
    b. All changes to the line(s), including adding or removing details, can be found on the Changes tab on the vendor proposal page.



2. Vendors may also submit a substitute item as a completely new line item instead of proposing a price for the initial Collaboration request, appearing on the Collaboration tab as a new line.



3. To accept the proposed substitute, choose to **'Accept Proposal'** when finishing Collaboration with the vendor, and use the Acceptance drop-down menu to Accept the line(s) and finish Collaborating. See Section VII: Finishing Collaboration for more information on ending the Collaboration process.



Buyers should check their purchasing policy guidelines or contact their purchasing leadership for guidance on whether to accept the substitute item(s).

VI. Communicating with Vendors During Collaboration

Users can communicate with vendors both via the **'Send Message'** Collaboration tool and **'Comments'** section on the Purchase Requisition (PR) Summary page during Collaboration.

Users can also contact the vendor directly using information found in the electronic Vendor Portal or given by the vendor themselves during Collaboration.

1. For comments that should be seen by all vendors selected for Collaboration, users can use the Comments section on the PR Summary page.

    a. Either before or during active Collaboration, navigate to the Summary page.

    b. To add a new comment to the PR, click the **'Add Comment'** button or link.

    c. After writing any pertinent information for the supplier, check **the 'Visible to suppliers during collaboration'** box and click **'OK'**

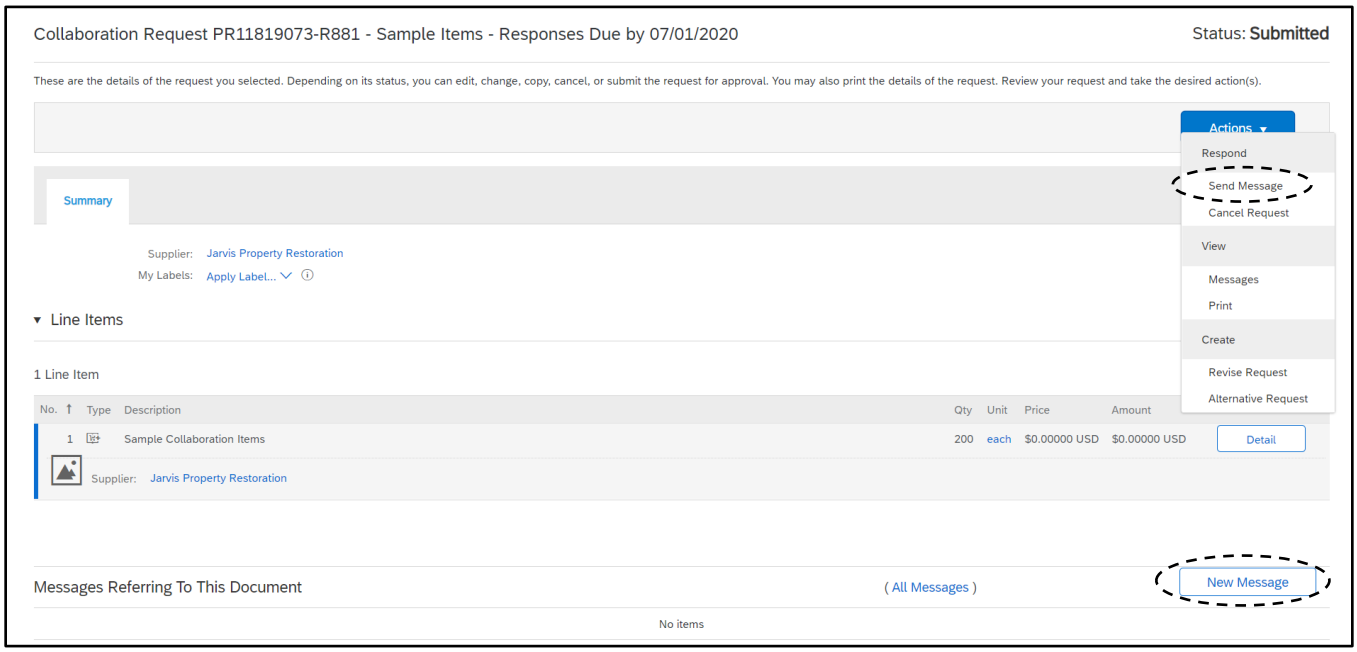
    d. Vendors will see any designated comments on the same screen as the line item details in their Ariba Network account.

2. Users may also want to exchange messages with individual vendors using the 'Send Message' tool once Collaboration has begun.

    d. Select the **'ID,' 'Title,'** or **'Required Action'** of a PR currently in 'Collaborating' status in the To Do portlet to be brought to the Collaborating tab.

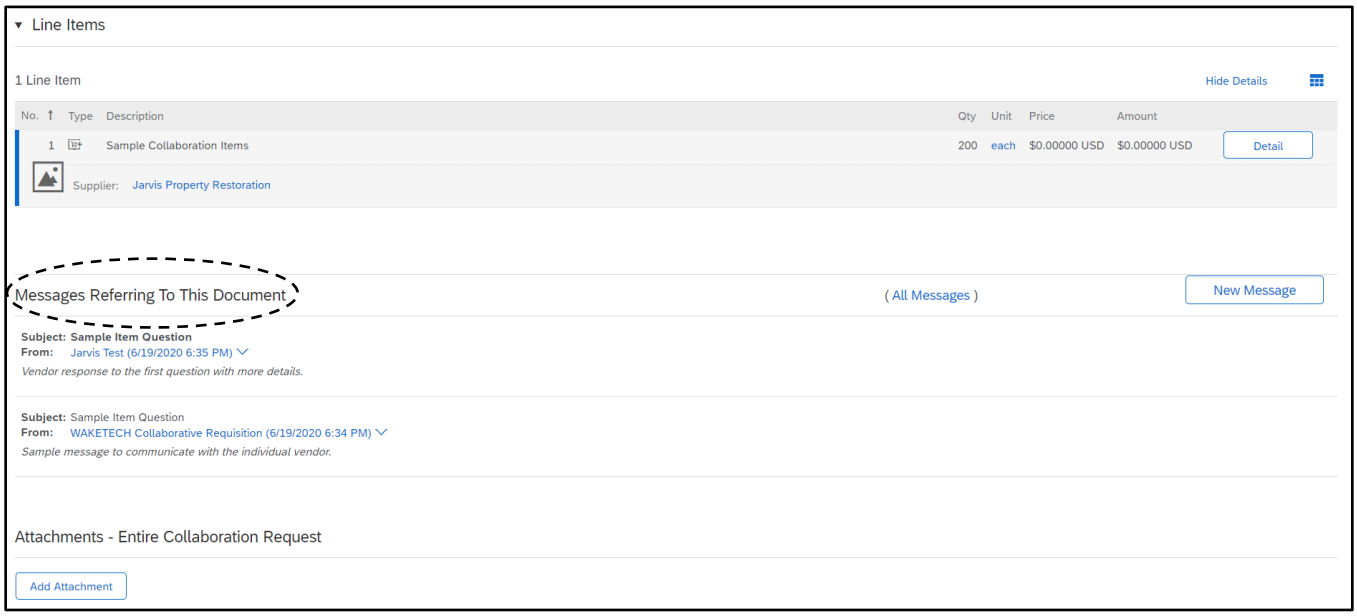
3. Click the **'Request Sent'** link for the chosen vendor under the Status column.

4. Use the **'Actions'** drop-down in the upper right and select **'Send Message,'** or use the **'New Message'** button on the lower right.



5. Compose the message and add any reference attachments, then click **'Send.'**

6. Messages sent by both the buyer and vendor will appear in the **'Messages Referring To This Document'** section on the vendor's Collaboration details page.



VII. Finishing Collaboration

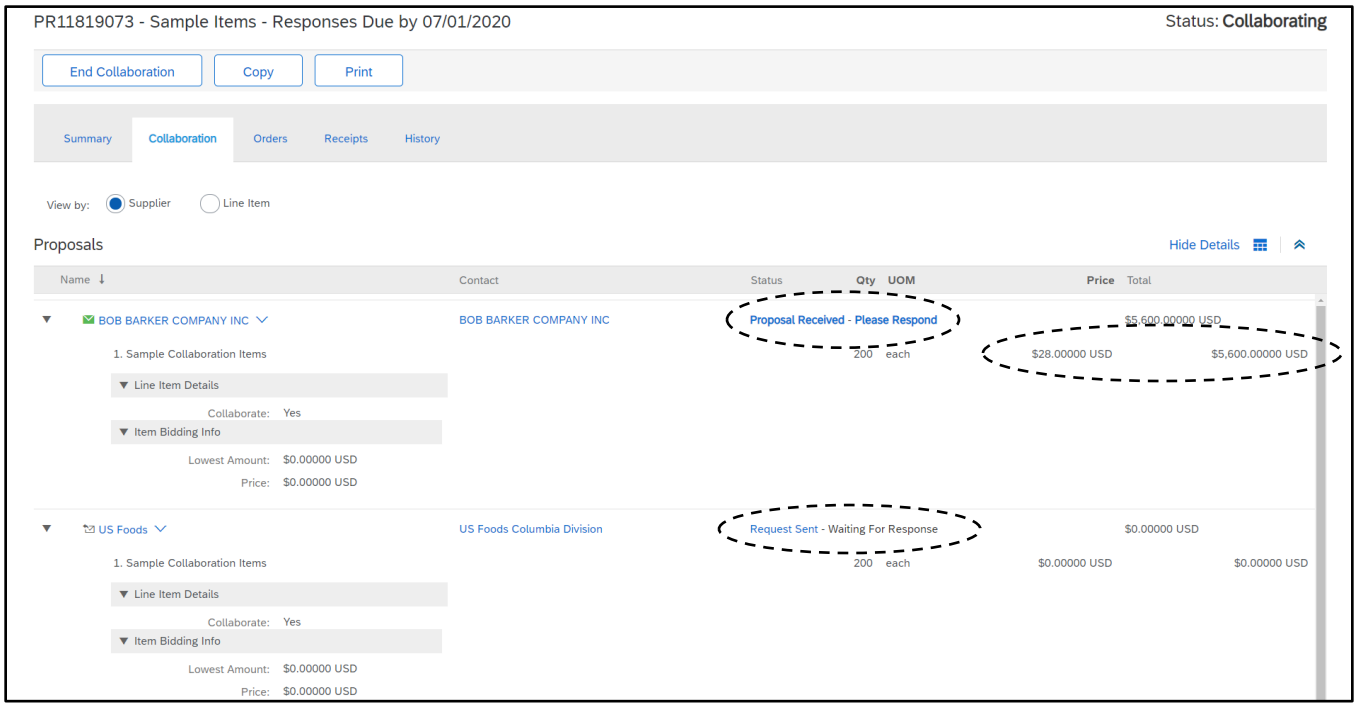
Users may end Collaboration at any time, either because the Collaboration is no longer needed or to accept a vendor's submitted pricing proposal. Users can perform either action from the Collaboration tab on the Purchase Requisition (PR) currently in Collaborating status.

1. Select the **'ID,' 'Title,'** or **'Required Action'** of a PR currently in 'Collaborating' status in the To Do portlet to be brought to the Collaboration tab.

    a. The Collaboration tab shows the overview and status of the Collaboration requests.

    b. This tab shows all vendors added to the Collaboration request(s), if they have provided a quote, and the 'Price Per Unit' and 'Total' for all vendors that have responded.

    c. Proposed pricing can be quickly compared on this page to determine the vendor to choose.

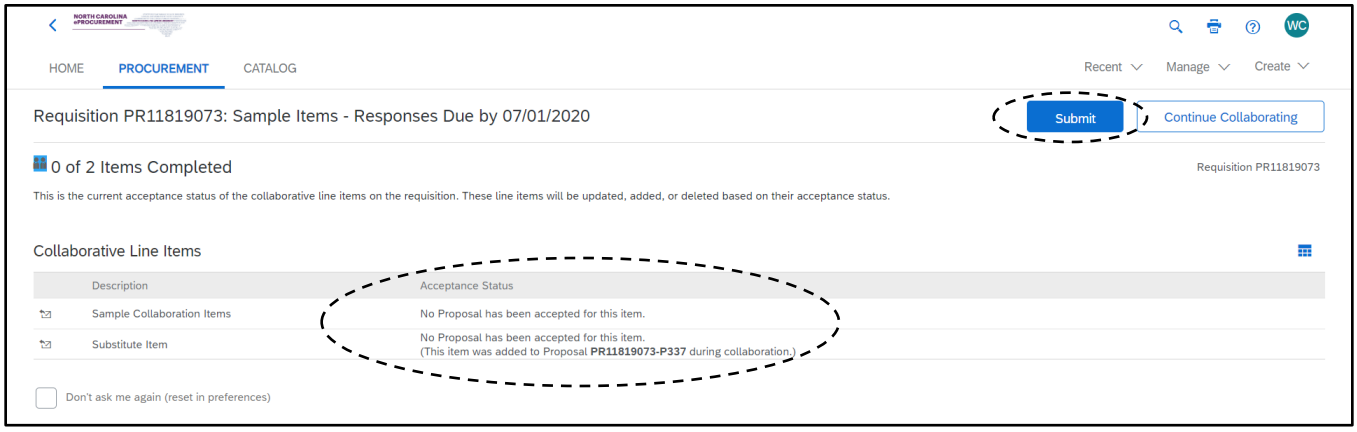


2. To end a Collaboration request before selecting a vendor, select the **'End Collaboration'** button in the upper left.

    a. The next page shows the Acceptance Status of all collaboration line items on the PR, including any new lines for vendor suggested substitutions. See Section V: Handling Substitutions for more information on substitute items.

    b. Clicking **'Submit'** will delete line items with no accepted vendor proposals. This will end any Collaboration for all line items on the PR.

    c. Click the **'Continue Collaborating'** button to go back to the Collaboration tab and continue evaluating vendor responses.

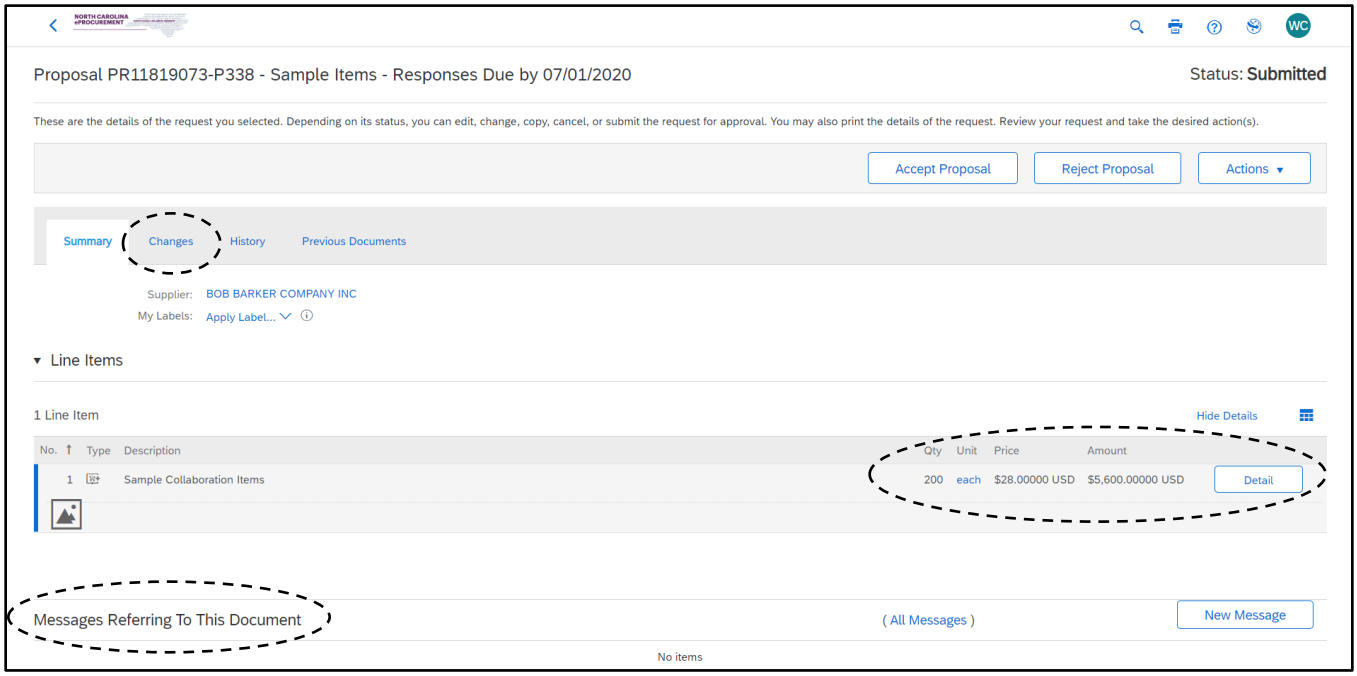


3. When a vendor has responded to the Collaboration, the status will update to **'Proposal Received – Please Respond'** on the Collaboration tab. Click on the status link to go to the proposal details.

    a. The Changes tab shows all changes to the Collaboration line item that the vendor made when sending in their request.

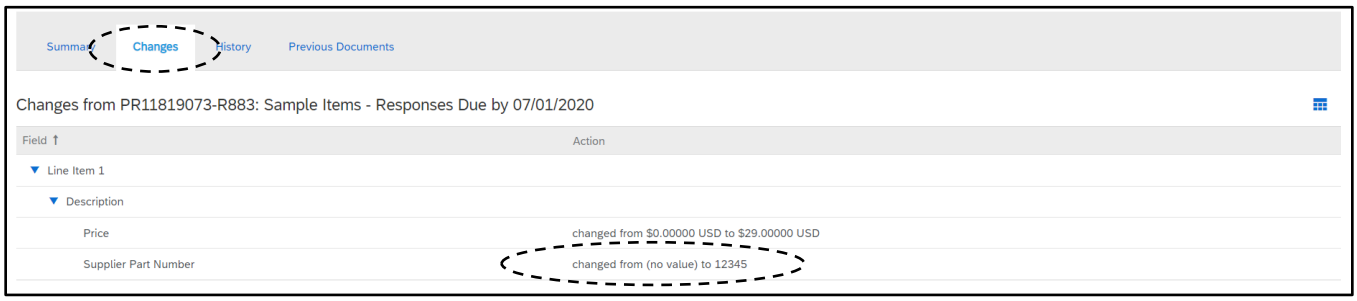
    b. The History tab will show when the vendor sent their proposal to the buyer.

    c. All Messages and Attachments exchanged with the chosen vendor can be found below the line item details for reference before finishing Collaboration.



4. Use the Changes tab to inspect the line item response details. Check to see if the Full Description, Quantity, Part Number, etc. have been altered by the vendor.

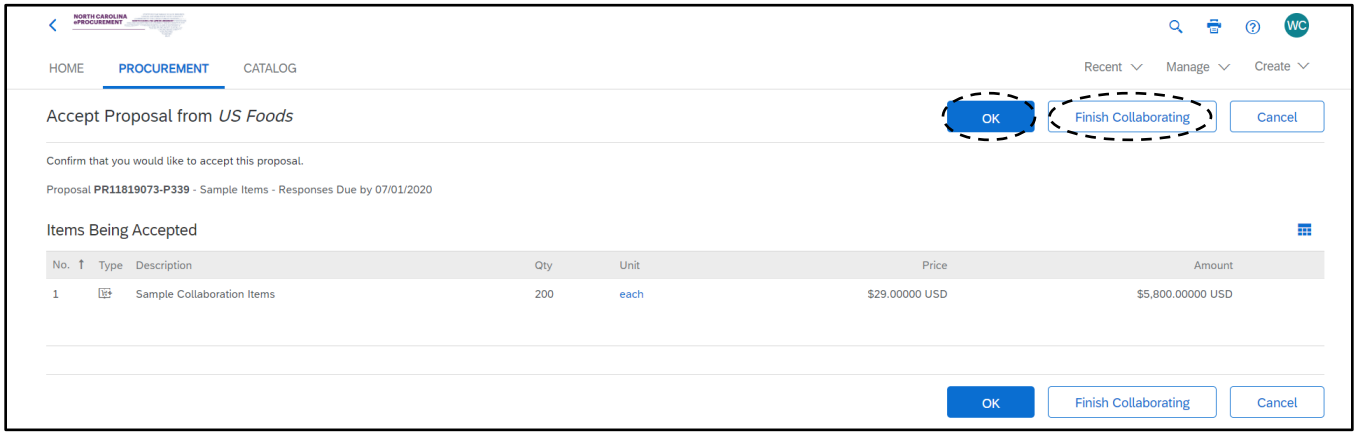
    a. If any details have been altered without prior notice, contact the vendor to see why the changes were made and work with your purchasing department to see if the substituted item details can be accepted, if needed.



5. Click **'Accept Proposal'** at the top of the page of the best vendor proposal.

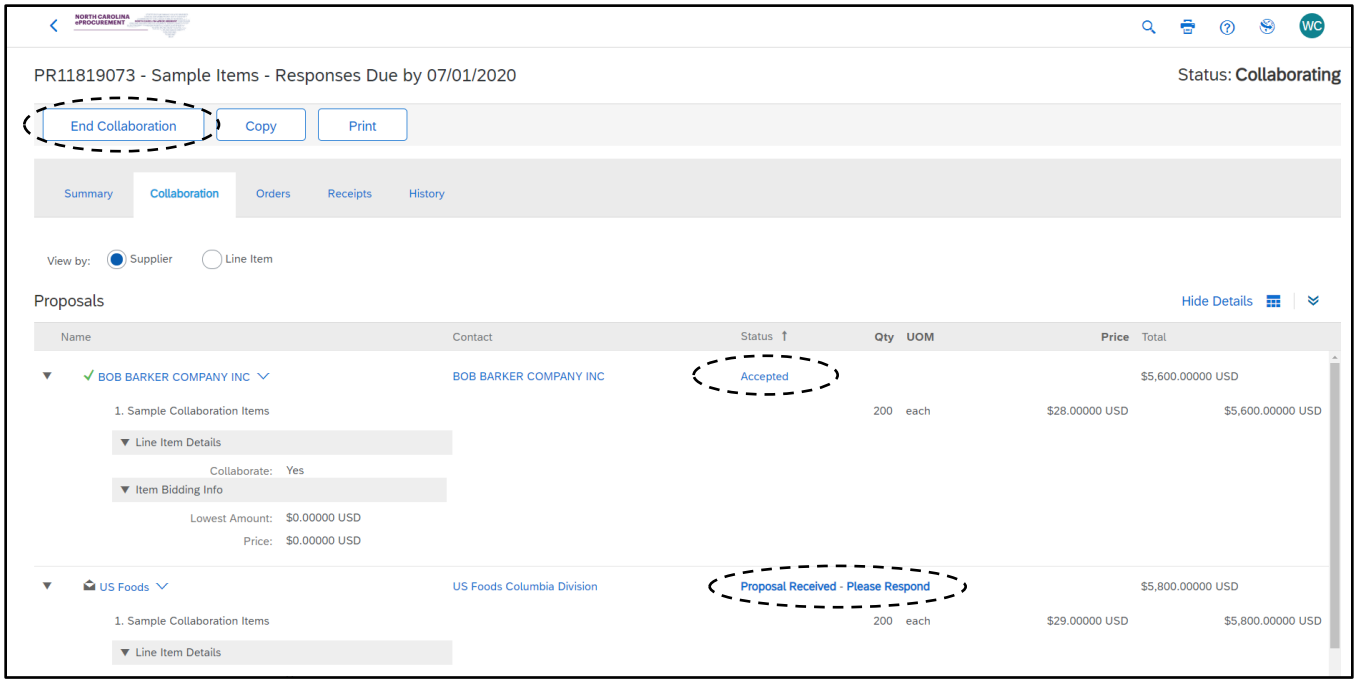
6. Select the **'OK'** button to accept the vendor proposal for Collaboration for just the chosen line and continue Collaboration on other lines.

    a. The **'Finish Collaborating'** button is for ending Collaboration immediately after accepting this vendor proposal.



7. After accepting proposals for all line items as needed, select the **'End Collaboration'** button on the Collaboration tab.

Note: After accepting a vendor response for a Collaboration request, the status of other vendor responses will not be altered by the system until Collaboration ends.

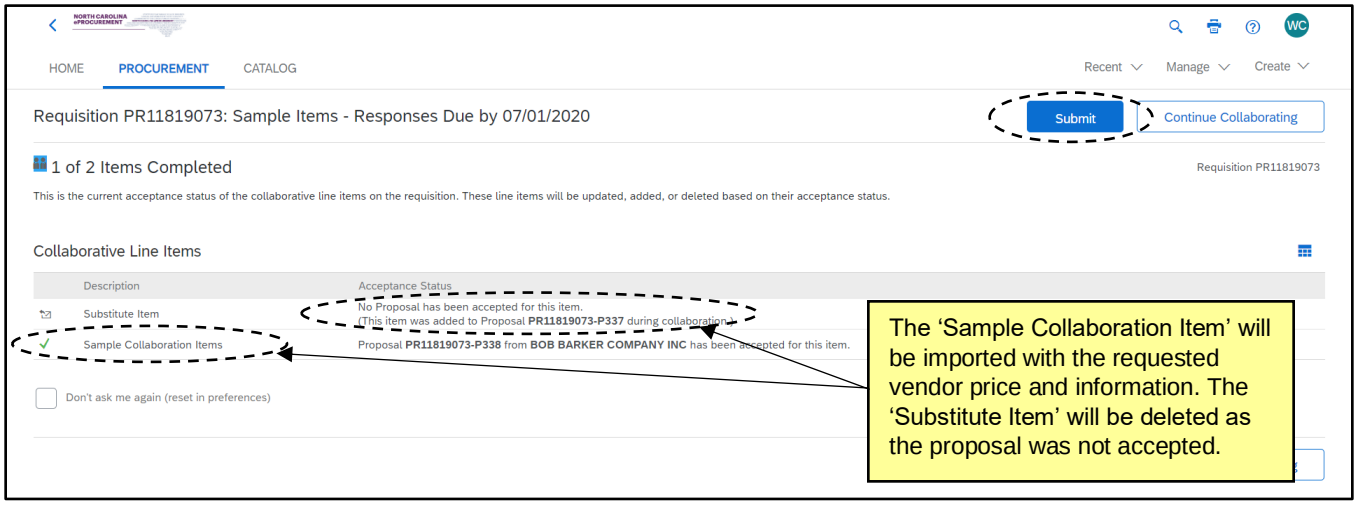


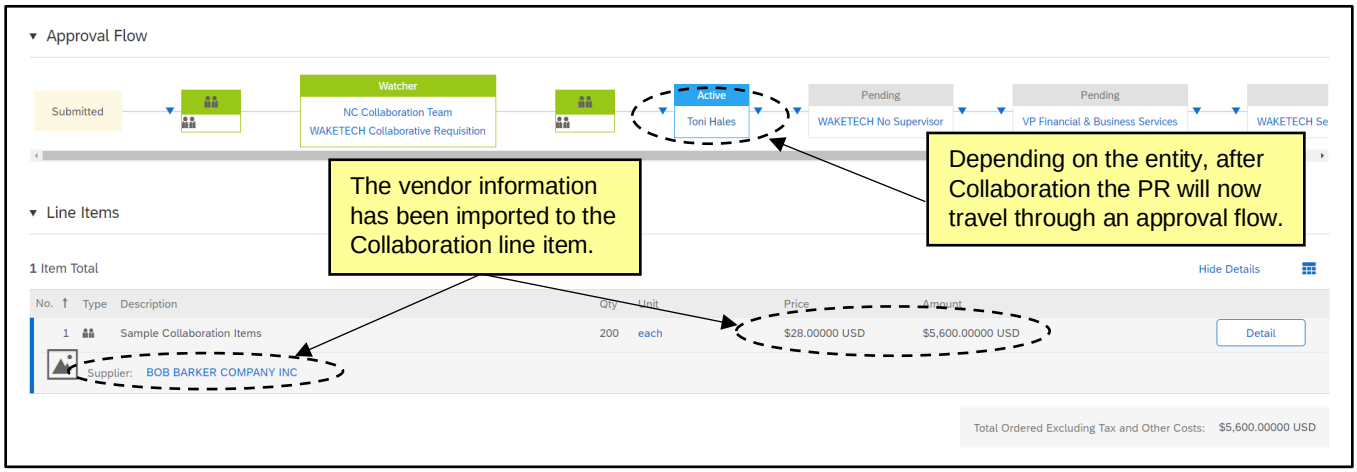
8. Click **'Submit'** to end Collaboration for the line item(s) and merge the quoted price for the goods or services onto the PR.

    a. Any lines without accepted vendor proposals, including substitutes, will be deleted from the PR.

    b. Click the **'Continue Collaborating'** button to go back to the Collaboration tab and continue evaluating vendor responses.

9. Once the user clicks **'Submit'** to accept the vendor proposal(s), the PR Collaboration line items will be populated with the vendor chosen and the proposed pricing.



10. As Collaboration is finished, the status will move to 'Collaboration Completed' and the PR is sent to the Approval Flow. Check the Approval Flow on the PR Summary page for further information on the required approvals for the newly submitted PR.

Note: Depending on the Approving rules set up by the requester's entity, the PR may need to be approved by additional groups, sent to the vendor directly for order fulfillment, or be sent the user's financial system. For questions about the approval flow rules set up for your entity, please contact your Security Administrator.