



## EPLite Editing Line Item(s) Process Guide

This process guide provides instruction on the functional steps to edit line items on an eRequisition for users with Community Colleges and School Systems. To edit existing line items values or add additional line item information, such as accounting codes, users can edit the line item from the Summary page.

### I. Editing a Single Line Item

1. Place a checkmark in the box beside the line item to edit and click **'Edit.'**

RQ16986918: test eRequisition Back to Catalog Submit Exit

Review your requisition, make changes as necessary, and submit the request for approval.

**Summary** Approval Flow

Title: test eRequisition

Pre-Encumbrance Status: Not Encumbered

On Behalf Of: \* NCASRequester NCASR

Delay Purchase Until:

Buying Entity: \* 13EG

Transmit To Supplier?

My Labels:  [Apply Label...](#)

**Line Items (2)** Show Details

No.	Type	Description	Supplier Part Number	Qty	Unit	Tax	Other	Price	Amount
<input checked="" type="checkbox"/>	1	Small Air Compressor		<input type="text" value="1"/>	each	\$0.00 USD	\$0.00 USD	\$79.00 USD	\$79.00000 USD
<input type="checkbox"/>	2	Air Compressor Hose		<input type="text" value="1"/>	each	\$0.00 USD	\$0.00 USD	\$4.00 USD	\$4.00000 USD

|

Total Cost: \$83.00000 USD

2. The **'Line Item Details'** page displays. All details related to this line item are shown on this page, where users may update the necessary information about this line item.
3. For EPLite entities, the **'Tax Rate'** field defaults to the value set by the entity but can be changed using the drop-down menu.



4. **'Item Classification'** is set by commodity code and cannot be changed. A 'good' commodity code will set the Item Classification to 'Good' and a 'service' commodity code will set the Item Classification to 'Service.'

**Note:** The **'Inventory ID'** and **'Recycled Code'** fields are visible to SunPac users only.

**Note:** The fields that can be edited by a user are determined by the line item type (non-catalog, catalog, or punchout).

The screenshot displays the 'LINE ITEM DETAILS' for a requisition. The form contains the following fields and values:

No.:	1
Description:	Small Air Compressor
Qty:	1
UOM:	each
Commodity Code:	* 025-10 - Compressor, E
Amount:	\$79.00000 USD
Price:	\$79.00 USD
Tax Rate:	Other
Tax Amount:	\$0.00 USD
Other Costs:	\$0.00 USD
Supplier:	100 Gardens, LLC
Location:	Dillworth [ select ]
Supplier Part Number:	
Recycled Content?:	<input type="radio"/> Yes <input checked="" type="radio"/> No
Item Classification:	Good
Contract Type:	Statewide
Contract:	* 031A: Air Conditioners,
Blanket Purchase?:	<input type="radio"/> Yes <input checked="" type="radio"/> No

A yellow callout box with the text "Free-text fields, drop-down menus and radio buttons indicate that the field can be edited by a user." has arrows pointing to the Description, UOM, Commodity Code, Supplier, Location, Recycled Content?, and Item Classification fields.



- Click the drop-down menu of the field that needs to be updated. If the appropriate choice is not displayed as a recent selection, select **'Search for more...'** to view the full list of available selections. Below, **'Commodity Code'** is used as an example.

Enter information using the drop-down menus. If the desired value cannot be found in the list, click **'Search for more...'** to view a complete list of selections.

- If **'Search for more...'** is selected, a pop-up window will appear. This pop-up window allows users to search for and select the appropriate information for the line item.



- To select a value for the field that is being edited, click the **'Select'** button next to the appropriate value.

Users can select which field to search using the drop-down menu.

Name ↑	ID	
▼ All Commodities	ALL	Select
▶ 005-00 - ABRASIVES	005-00	Select
▶ 010-00 - ACOUSTICAL TILE, INSULATING MATERIALS, AND SUPPLIES	010-00	Select
▶ 015-00 - ADDRESSING, COPYING, MIMEOGRAPH, AND SPIRIT DUPLICATING MACHINE SUPPLIES: CHEMICALS, INKS, PAPER, ETC.	015-00	Select
▶ 019-00 - AGRICULTURAL CROPS AND GRAINS INCLUDING FRUITS, MELONS, NUTS, AND VEGETABLES	019-00	Select
▶ 020-00 - AGRICULTURAL EQUIPMENT, IMPLEMENTS, AND ACCESSORIES (SEE CLASS 022 FOR PARTS)	020-00	Select
▶ 022-00 - AGRICULTURAL EQUIPMENT AND IMPLEMENT PARTS	022-00	Select
▼ 025-00 - AIR COMPRESSORS AND ACCESSORIES	025-00	Select
025-10 - Compressor, Bare Unit (Not Mounted or Powered), 15 HP and less	025-10	Select
025-20 - Compressor, Bare Unit (Not Mounted or Powered), over 15 HP	025-20	Select
025-30 - Compressor, Base or Tank Mounted, Electric Motor or Engine Driven, 15 HP and less; and Parts	025-30	Select
025-40 - Compressor, Base or Tank Mounted, Electric Motor or Engine Driven, Over 15 HP; and Parts	025-40	Select
025-43 - Compressor, High Pressure, All Sizes and Models	025-43	Select
025-45 - Compressor, Portable, Electric Motor or Engine Driven, 5 HP and less; and Parts	025-45	Select
025-50 - Compressor, Portable, Electric Motor or Engine Driven, over 25 CFM at 100 PSI; and Parts	025-50	Select
025-55 - Dryers, Desiccant Air	025-55	Select
025-60 - Filters, Air Gauges and Valves, Pressure Regulators, Shock Mounts, etc.	025-60	Select

Federal Award Number: (none selected)



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8. Users can also search for the appropriate value by typing directly in the associated field.

The screenshot displays the 'LINE ITEM DETAILS' for requisition RQ16986918. The 'Commodity Code' field is highlighted with a dashed circle and a callout box. The callout box contains the following text: 'If the correct choice does not appear as a recent selection, the user can type a value into the field and press the **'Enter'** key to search based on what has been entered in the text field.'

No.:	1
Description:	Small Air Compressor
Qty:	1
UOM:	each
Commodity Code:	air
Amount:	\$79.00 USD
Price:	\$79.00 USD
Tax Rate:	Other
Tax Amount:	\$0.00 USD
Other Costs:	\$0.00 USD
Supplier:	100 Gardens, LLC
Location:	Dillworth [ select ]
Supplier Part Number:	
Recycled Content?	<input type="radio"/> Yes <input checked="" type="radio"/> No
Item Classification:	Good
Contract Type:	Statewide
Contract:	* 031A: Air Conditioners
Blanket Purchase?	<input type="radio"/> Yes <input checked="" type="radio"/> No

- Search results matching what the user typed into the field will appear in a pop-up window. Review the results and click **'Select'** next to the appropriate value.

The screenshot shows the NCE-Procurement interface. A search window titled "Choose Value for Commodity Code" is open. The search field contains the text "air" and a "Search" button. Below the search field is a table of results:

Name	ID	Select
025-00 - AIR COMPRESSORS AND ACCESSORIES	025-00	Select
025-10 - Compressor, Bare Unit (Not Mounted or Powered), 15 HP and less	025-10	Select
025-20 - Compressor, Bare Unit (Not Mounted or Powered), over 15 HP	025-20	Select
025-30 - Compressor, Base or Tank Mounted, Electric Motor or Engine Driven, 15 HP and less; and Parts	025-30	Select
025-40 - Compressor, Base or Tank Mounted, Electric Motor or Engine Driven, Over 15 HP; and Parts	025-40	Select
025-43 - Compressor, High Pressure, All Sizes and Models	025-43	Select
025-45 - Compressor, Portable, Electric Motor or Engine Driven, 5 HP and less; and Parts	025-45	Select
025-50 - Compressor, Portable, Electric Motor or Engine Driven, over 25 CFM at 100 PSI; and Parts	025-50	Select
025-55 - Dryers, Desiccant Air	025-55	Select
025-60 - Filters, Air Gauges and Valves, Pressure Regulators, Shock Mounts, etc.	025-60	Select
025-70 - Moisture Separators, Non-Refrigerated	025-70	Select
025-80 - Moisture Separators, Refrigerated	025-80	Select
025-85 - Motors, Air Compressor	025-85	Select
025-90 - Recycled Air Compressor Accessories and Supplies	025-90	Select
031-00 - AIR CONDITIONING, HEATING, AND VENTILATING EQUIPMENT, PARTS AND ACCESSORIES (SEE CLASS 740 ALSO)	031-00	Select
035-00 - AIRCRAFT AND AIRPORT EQUIPMENT, PARTS, AND SUPPLIES	035-00	Select

The interface also shows a sidebar with "LINE ITEM DETAILS" and a "Done" button at the bottom right of the search window.



10. Users can also edit accounting and shipping information on the 'Line Item Details' page.
  11. For accounting and shipping information, editable fields are uniform across all types of line items.
  12. **Account Type** – Defaults to 'Expense' and should not be modified.
  13. **Bill To** – Defaults from the user's profile but can be modified using the drop-down menu.
  14. **Account Code** – The appropriate Account Code should be entered in the free-text field.
- Note:** NC E-Procurement does not validate the account codes entered in the 'Account Code' field, or encumber the purchase amount from the designated account code. All financial functions are still completed in the entity financial system.
15. **Ship To** – Defaults from the user's profile but can be modified using the drop-down menu.
  16. **Deliver To** – Defaults from the user's profile but can be modified using the free text field.
  17. **Need-by Date** – Enter the date for the items to be delivered if necessary.
  18. **Shipping Method** – Using the drop-down menu, select the appropriate shipping method.
  19. **FOB Code** – Select the FOB (Freight on Board) code using the drop-down menu.
  20. **Terms of Payment** – The Terms of Payment default to what has been selected under the 'Shipping - Entire eRequisition' section on the Summary page. The appropriate Terms of Payment can also be set for each line item.
  21. Click 'OK' to complete the line item edits.



## II. Editing a Non-Catalog Item

1. When editing a non-catalog item, the following fields can be edited:

- Price
- Supplier Location
- Contract
- Commodity Code
- Tax Rate
- Bill To
- Ship To
- Need-by Date
- FOB Code
- Supplier
- Contract Type
- Blanket Purchase Order Indicator
- Bid Number
- Account Type
- Account Code
- Deliver To
- Shipping Method
- Terms of Payment

2. Supplier Location can be edited by clicking the **'Select'** link next to the **'Location'** field.

The screenshot shows the 'LINE ITEM DETAILS' for a non-catalog item. The item number is 1, and the description is 'Small Air Compressor'. The quantity is 1, and the unit of measure is 'each'. The commodity code is '025-10 - Compressor, E'. The amount is \$79.00000 USD, and the price is \$79.00 USD. The tax rate is 'Other', and the tax amount is \$0.00 USD. The other costs are \$0.00 USD. The supplier is '100 Gardens, LLC'. The location is 'Dillwork' with a 'select' link next to it. The supplier part number is blank. The recycled content is 'No'. The item classification is 'Good', and the contract type is 'Statewide'. The contract is '031A: Air Conditioners,'. The blanket purchase option is 'No'.





- Users can select which type of Contract is associated with the non-catalog line item using the **'Contract Type'** drop-down menu.

**Note:** Contract Type, Contract ID, and Bid Number must all 'match.' Users who encounter an error message after selecting a value from the drop-down menu may need to select **'Search for more...'** to find the appropriate value. This ensures that the Contract Type, Contract ID, and Bid Number combination on the eRequisition match the most current information in NCAS.

The screenshot displays the 'LINE ITEM DETAILS' for a requisition. The item is 'Small Air Compressor' with a quantity of 1 and a unit of 'each'. The commodity code is '025-10 - Compressor, E'. The amount is \$79,000.00 USD, and the price is \$79.00 USD. The supplier is '100 Gardens, LLC' located in 'Dillworth'. The 'Contract Type' dropdown menu is open, showing the following options: Statewide (selected), No, Agency Specific, and IT Convenience. A dashed circle highlights the dropdown menu.

- When a Contract Type is selected, the **'Contract'** field appears. Depending on the Contract Type it will appear as a drop-down menu or a free-text field. The Contract Type has been set to **'Statewide'** in the example below.



5. Select the down arrow from the **'Contract'** drop-down menu. If the appropriate Contract ID is not displayed as a recent selection, choose **'Search for more...'** to view the full list of available contracts.

The screenshot shows the 'LINE ITEM DETAILS' for item 1. The 'Contract' field is set to '031A: Air Conditioners, Room'. A dashed oval highlights the 'Contract' field and its dropdown menu, which includes the option 'Search for more...'. The 'Contract Type' is 'Statewide'. The 'Supplier' is '100 Gardens, LLC' and the 'Location' is 'Dillworth [ select ]'. The 'Amount' is '\$79.00000 USD' and the 'Price' is '\$79.00 USD'. The 'Commodity Code' is '025-10 - Compressor, E'. The 'UOM' is 'each' and the 'Qty' is '1'. The 'Tax Rate' is 'Other' and the 'Tax Amount' is '\$0.00 USD'. The 'Other Costs' are '\$0.00 USD'. The 'Supplier Part Number' is empty. The 'Recycled Content?' is 'No'. The 'Item Classification' is 'Good'. The 'Blanket Purchase?' is 'No'. The 'Bid Number' is empty.

6. If **'Search for more...'** is selected, the **'Choose Value for Contract'** pop-up window will appear. This pop-up window allows users to search by contract name and select the appropriate contract.



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7. To add a Contract to the line item, click **'Select'** next to the appropriate value.

The screenshot displays the NCE-Procurement ARIBA SPEND MANAGEMENT interface. A 'Choose Value for Contract' dialog box is open, showing a list of contract options. The '045A: Appliances, Domestic' option is circled in red. The background shows the 'LINE ITEM DETAILS' for a requisition item.

Contract Name	Select
(no value)	Select
001A: Correction Enterprises Products. Pursuant to G.S. 148-134	Select
020E: Riding Slope Mowers	Select
031A: Air Conditioners, Room	Select
031B: Filters, Air (HVAC)	Select
035A: Automatic Weather Observation System (AWOS)	Select
045A: Appliances, Domestic	Select
055A: Covers Seat School Bus	Select
060A: Automotive Industrial Parts and Supplies	Select
060B: Batteries Storage	Select
060C: Filters, Oil and Air, Automotive	Select
065A: Bodies Truck Automotive	Select
065C: Dump Truck Bodies	Select
070A: 2013 Model Year Passenger Vehicles	Select
070B: 2013 Model Year Law Enforcement Vehicles	Select
070G: 2013 Model Year Trucks, Vans, Utility Vehicles, Crossovers- Conventional Fuels and AFVs	Select
070L: Conversion & Lift Vans	Select
070N: Neighborhood Electric Vehicles	Select
070P: Golf Cars	Select



### III. Editing a Catalog Item

1. When editing a catalog item, the following fields can be edited:

- Supplier Location
- Account Type
- Account Code
- Ship To
- Need-by Date
- FOB Code
- Tax Rate
- Bill To
- Center
- Deliver To
- Shipping Method
- Terms of Payment

**Note:** Users with the Purchasing Agent role can edit the price on a catalog line item. Prices on catalog items can only be decreased. If the catalog data is incorrect, please also contact the NC E-Procurement Helpdesk at (888) 211-7440 Option 1, or email [ephelpdesk@its.nc.gov](mailto:ephelpdesk@its.nc.gov), so that the issue can be researched.

2. **Additional Data** – When an eRequisition line item is a BForm (Business Form), the additional information for that line item (e.g., color, size) will display in the **'Additional Data'** field. The selection in this field can be edited by clicking on the linked value that appears.

**'Description,' 'UOM,' 'Price,' 'Commodity Code,' and 'Supplier' fields are not editable for catalog line items.**

Click on the **'Additional Data'** link to view more information for the catalog item.



## IV. Editing a Punchout Catalog Item

1. When editing a punchout catalog item, the following fields can be edited:

- Supplier Location
- Tax Rate
- Bill To
- Ship To
- Need-by Date
- FOB Code
- Commodity Code
- Account Type
- Account Code
- Deliver To
- Shipping Method
- Terms of Payment

**Note:** Changes to the Quantity field must be made within the supplier's punchout catalog. Users can click the **'Edit'** link to punch back out to the supplier's catalog and make any changes.

The screenshot displays the 'LINE ITEM DETAILS' for item 1. The fields shown are:

- No.: 1
- Description: IBM BladeCenter
- Qty: 1
- UOM: each
- Commodity Code: \* 204-64 - Network Comp
- Amount: \$3,056.76000 USD
- Price: \$3,056.76 USD
- Tax Rate: Other
- Tax Amount: \$0.00 USD
- Other Costs: \$0.00 USD
- Supplier: IBM - MICROCOMPUTERS (204A)
- Location: IBM CORPORATION [ select ]
- Supplier Part Number: 86773TU
- Recycled Content?: No
- Item Classification:
- Contract Type:
- Contract:
- Bid Number:
- Comments for Accounts Payable Attention:
- Due-on Date:

Annotations in the screenshot:

- A yellow callout box with arrows pointing to Description, UOM, Price, and Supplier fields: **'Description,' 'UOM,' 'Price,' and 'Supplier' fields are not editable for punchout catalog line items.**
- A yellow callout box with an arrow pointing to the 'Edit this Punchout Catalog Item' link: **Click 'Edit' to return to the punchout catalog to update the quantity.**



## V. Mass Edit Functionality

When creating an eRequisition with multiple line items, users can mass edit eRequisition line items to set the same values for multiple lines. Not all fields are available for mass editing. Users will find this feature helpful when setting account codes. Commodity codes can also be changed using the mass edit function as long as the items being edited are non-catalog items.

During Mass Edit, the sample line item is determined based on the following order of the line item type: Catalog, Punch-out, Non-Catalog. Users will only be able to edit the fields associated with the sample item according to the chart below.

<b>Editable Fields by Sample Line Item Type</b>			
<b>Field</b>	<b>Non-Catalog</b>	<b>Catalog</b>	<b>Punchout</b>
Supplier	X		
Supplier Location	X	X	X
Contract Type	X		
Contract	X		
Blanket Purchase Order Indicator	X		
Commodity Code	X		X
Quantity			
Price			
Tax Rate	X	X	X
Account Type	X	X	X
Bill To	X	X	X
Account Code	X	X	X
Ship To	X	X	X
Deliver To	X	X	X
Need-by Date	X	X	X
Shipping Method	X	X	X
FOB	X	X	X
Terms of Payment	X	X	X



1. To mass edit line items, place a check in the checkbox beside each line item to be edited and click the 'Edit' button.

The screenshot shows the NCE-Procurement eRequisition system interface. The page title is "RQ16986918: test eRequisition". The interface includes a navigation bar with "Home", "Help", and "Logout" options. Below the navigation bar, there are buttons for "Create", "Search", "Manage", and "Preferences". The main content area displays the requisition details under the "Summary" tab. The requisition title is "Test Requisition". The Pre-Encumbrance Status is "Not Encumbered". The On Behalf Of field is set to "NCASRequester NCASR". The Delay Purchase Until field is empty. The Buying Entity is set to "13EG". The Transmit To Supplier checkbox is checked. Below the requisition details, there is a "Line Items" table with two items. The first item is "Award, 5 Year, Ballpoint pen has a click-top ..." with a quantity of 1 and a price of \$9.59 USD. The second item is "Test non-catalog item" with a quantity of 1 and a price of \$35.00 USD. The "Edit" button is circled in red.

No.	Type	Description	Supplier Part Number	Qty	Unit	Tax	Other	Price	Amount
1		Award, 5 Year, Ballpoint pen has a click-top ...	SNC8001	1	each	\$0.00 USD	\$0.00 USD	\$9.59 USD	\$9.59000 USD
2		Test non-catalog item		1	each	\$0.00 USD	\$0.00 USD	\$35.00 USD	\$35.00000 USD

Total Cost: \$44.59000 USD  
Update Total

2. During Mass Edit, the sample line item is determined based on the following order of the line item type: Catalog, Punchout, Non-Catalog. Users will only be able to edit the fields associated with the sample item, as described in the chart at the beginning of this section. The screenshot on the next page shows the mass edit functionality when both a non-catalog item and a catalog item are selected for editing.

**Note:** Some changes made during a mass edit do not apply to all line items. For instance, if the supplier location has been updated for two line items with different suppliers, the edit is only applied to the sample line item because the selected location is invalid for the other line item.

3. Edit the necessary fields.



4. Click **'Next'** to review the mass edit changes.

**'Description,' 'UOM,' 'Price,' 'Commodity Code,' and 'Supplier' fields are not editable because the catalog item is used as the sample item.**

**Note:** The mass edit functionality uses line item 1 as a sample item for the mass edit only if all of the line items are of the same type. Users edit the necessary fields on the sample line item. When done editing, the changes made against the sample line item will be applied to qualifying line items.

5. Review the modified fields and click **'Done'** to complete the mass edit and apply the changes.

Old Value		New Value	
<b>Accounting</b>			
Bill To:	13PT	Bill To:	13PT
Payment Basis:	Receipt	Payment Basis:	Receipt
Federal Award Number:	(no value)	Federal Award Number:	(no value)
<hr/>			
Entity:	13	Entity:	13
Company:	[Redacted]	Company:	[Redacted]
Account:	[Redacted]	Account:	[Redacted]
Center:	[Redacted]	Center:	[Redacted]
Multi Year Indicator:	Unspecified	Multi Year Indicator:	Unspecified
Project Company:	Unspecified	Project Company:	Unspecified
Project Code:	Unspecified	Project Code:	Unspecified