



I. eRequisition Non-Catalog Item

Users may manually add non-catalog items to their eRequisitions when a catalog item is not available or when they are ordering from a vendor who is not on a Statewide term contract.

1. From the NC E-Procurement Dashboard, click **'eRequisition'** from the **'Create'** Shortcut Menu or on either the Menu Bar or the **'Common Actions'** Portlet.

Users may create a new eRequisition by selecting 'eRequisition' in the 'Create' drop-down menu or by clicking 'eRequisition' in the 'Common Actions' Portlet.

2. Click the **'Create Non-Catalog Item'** button to enter non-catalog information.

Note: View and note the eRequisition number. The eRequisition title has not yet been added.

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3. **Full Description:** Enter a description of the item being purchased. Be sure to enter as much detail as necessary for the supplier to accurately fulfill the item (e.g., color, dimensions, etc).
4. **Commodity Code:** Locate the appropriate commodity code that describes the item being purchased by using the drop-down menu. If a desired commodity code is not listed in the drop-down menu, select **'Search for more...'** to search for the appropriate code. Users may search by commodity code or keyword.

Note: It is important to select the appropriate commodity code as the State of North Carolina uses this for reporting purposes. The commodity codes listed are part of the National Institute of Governmental Purchasing (NIGP) commodity code structure. Most commodity codes that begin with a '9' describe service type commodities. These codes should not be used when purchasing goods.

Note: NCAS requires users to enter a commodity code extension other than '***-00' as this number only refers to the general header for a particular commodity. EPLite users may use the '***-00' extension.

The screenshot shows the 'Choose Value for Commodity Code' dialog in the ARIBA Spend Management system. The dialog has a search field at the top and a list of commodity codes below. The list includes codes like 803-00, 803-16, 803-10, 803-19, 803-32, 803-43, 803-64, 803-80, 803-90, 885-00, 890-00, 895-00, 898-00, and 905-00. Each code has a 'Select' button next to it. A yellow callout box points to the '803-00 - VOICE RESPONSE SYSTEMS' header, stating: 'NCAS requires users to select a commodity code ending in an extension other than '***-00.' To view the commodity code drop-down menu by header, click the arrow next to the commodity code. The drop-down menu will expand to show the list of choices under the main header.' Another yellow callout box points to the '905-00 - AIRCRAFT AND AIRPORT OPERATIONS SERVICES' code, stating: 'Commodity codes in the 900s range refer to services.'

5. **Supplier:** Locate the supplier in the drop-down menu. If the supplier is not listed in the drop-down menu, choose '**Search for more...**' to search for the appropriate supplier.
6. **Location:** Click on '**Select**' if a different location for the supplier is preferred.
7. **Bid Number (State Agencies Only):** Select the appropriate bid number for the item being added. This field automatically populates for items on contract. If the bid number is not displayed, choose '**Search for more...**' to find the appropriate number.
8. **Supplier Part Number:** Enter the Supplier Part Number (if known). This will assist the vendor in shipping the correct item.
9. **Recycled Content:** Select the appropriate radio button to reflect whether or not the item contains recycled products.
10. **Item Classification:** This field will automatically populate to either Good or Service based on the commodity code that has been chosen.
11. **Contract Type:** Select the appropriate contract type. Options are Statewide, Agency Specific, and IT Convenience.



Note: Selecting **'Statewide'** or **'IT Convenience'** from the drop-down menu will add an additional **'Contract'** field to the eRequisition. Users may choose **'Search for more...'** to view the **'Choose Value for Contract'** page. Selecting **'Agency Specific'** from the drop-down menu will also add an additional **'Contract'** field to the eRequisition, but in this case, the **'Contract'** field is a free text field where the user can key in the appropriate information. Entering the correct contract information allows the State of North Carolina to accurately track and report against contract purchases.

Note: When an eRequisition includes a non-catalog item referencing a Statewide Term Contract, the system will conduct a look-up against the Contract ID to determine if a related catalog is loaded. Users may receive a warning message advising them to verify that the item cannot be ordered via an NC E-Procurement Catalog. When this warning message is displayed, users should search the online catalogs, including any punchout catalogs, for the item and add the catalog item to their cart, if applicable. If the item is not found in the catalog, the user may continue and submit the eRequisition with the non-catalog item.

12. **Blanket Purchase:** Choose whether the purchase is a Blanket or Non-Blanket.
13. **Quantity:** Enter the appropriate Quantity.
14. **Unit of Measure:** Locate the appropriate Unit of Measure in the drop-down menu. If the desired Unit of Measure is not listed in the drop-down menu, choose **'Search for more...'** to find the appropriate value.
15. **Price:** Enter the Price of the item.
16. **Tax Rate:** Enter the Tax Rate for the item being purchased. If no taxes should be applied to the item, select **'Other.'**



17. **Tax Amount:** This field automatically calculates based on the selected Tax Rate. Users may enter a specific Tax Amount in this field when the Tax Rate of **'Other'** is selected.

Note: For tax-exempt State Agencies, the Tax Rate will default to **'Other'** to prevent tax from automatically appearing on purchase orders. The default Tax Rate for non-exempt State Agencies can be set to the appropriate agency specific rate.

Note: Shipping/Freight charges should be included as a separate line item using the freight commodity code, **'962-86 – Services: Transportation of Goods (Freight)'** to ensure the supplier is not charged the 1.75% transaction fee for this service.

18. **Amount:** This field is automatically calculated based on the information entered above.

19. **Accounting – by Line Item:** **NCAS Agencies** must fill in the **'Company,' 'Account,'** and **'Center'** fields. Based on the combination entered, the **'Federal Award Number'** and **'ARRA'** fields may be also be populated. **School Systems and Community Colleges** must enter the **'Account Code.'**

20. Click **'OK.'**

Note: The shopping cart is automatically displayed after each item is added to the eRequisition.

21. Click the **'Add from Catalog'** button or the **'Add Non-Catalog Item'** to return to the Add Items page to select additional items for the eRequisition.

22. Add the Title of the eRequisition in the **'Title'** field.

23. The system generated approval flow can be reviewed by clicking the **'Approval Flow'** tab. For more information regarding approval flows, see the 'Approving an eRequisition' process guide.

NC E-Procurement A R I B A * SPEND MANAGEMENT Home | Help | Logout
Welcome NCASRequester NCASRequester

Create Search Manage Recent Preferences

RQ16977884: Untitled Requisition [Back to Catalog] [Submit] [Exit]

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

Summary **Approval Flow**

Title: Untitled Requisition

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 (1) [Hide Details]

No.	Type	Description	Supplier Part Number	Qty	Unit	Tax	Other	Price	Amount
1		Xerox Colorqube Ink Cyan, Colorqube 8870 (6 ...	108R00950	1	each	\$0.00 USD	\$0.00 USD	\$92.89 USD	\$92.89000 USD

24. Click **'Apply Label...'** to add a label to the eRequisition.

Summary **Approval Flow**

Title: Untitled Requisition

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 (1) [Show Details]

No.	Type	Description	Supplier Part Number	Qty	Unit	Tax	Other	Price	Amount
1		Non catalog test item		1	each	\$0.00 USD	\$0.00 USD	\$5.00 USD	\$5.00000 USD

[Edit] [Copy] [Delete] [Add from Catalog...] [Add Non-Catalog Item...]

Total Cost: \$5.00000 USD [Update Total]



25. The **'Shipping – Entire eRequisition'** section at the header level should be populated according to where and to whom the items on the eRequisition should be shipped. Shipping preferences entered here will default on the entire eRequisition unless a user has entered unique values on certain line items.

Note: Shipping preferences for single lines may be set by editing the line item individually. These edits will remain in place even if the user changes an overall setting on the **'Summary'** page.

26. The **'Ship To'** field automatically defaults to the ship to location set up in the user's profile. Users may choose a different option by selecting **'Search for more...'** from the drop-down menu.

Note: The **'Ship To'** drop-down menu contains the ship-to addresses that have been entered by an administrator. These addresses are agency specific.

27. The **'Deliver To'** field indicates the recipient of the order. This is a free-text field that defaults to the requester's name. The default value can be deleted, and the field can be populated with any value.

28. The **'Need-by Date'** field is transmitted on the purchase order to the supplier as the date by which the items need to be delivered. The calendar icon next to the field may be used to select the appropriate date.

29. The **'Shipping Method'** field describes the method by which items will be shipped to the buyer and defaults to **'BEST WAY'** for both NCAS Agencies and EPLite Agencies. This field can be changed by selecting **'Search for more...'** from the drop-down menu.

30. The **'Freight on Board (FOB) Code'** reflects how freight charges for the order are paid. This value defaults to **'001'** for NCAS Agencies and **'Destination'** for EPLite Agencies. Using the drop-down menu, users may select **'Search for more...'** to find the option that best meets the user's agency purchasing policies.

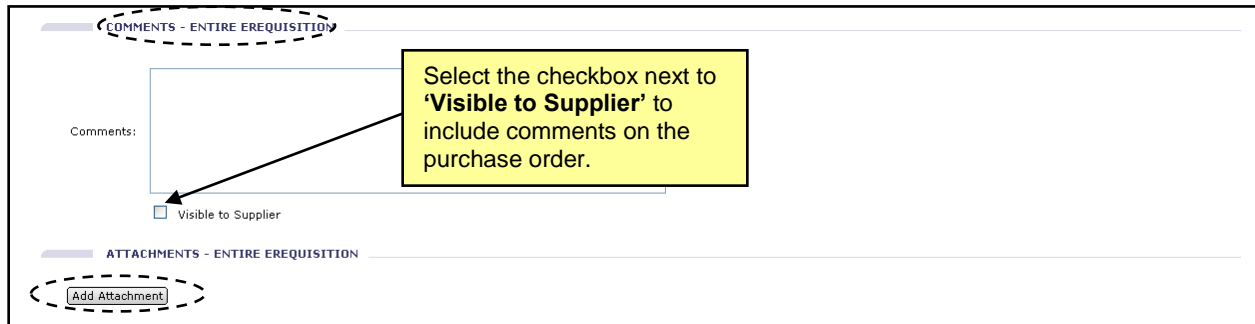
31. The **'Terms of Payment'** field describes the timelines and conditions of payment to the vendor and defaults to **'N30'** for both NCAS Agencies and EPLite Agencies. Using the drop-down menu, users may select **'Search for more...'** to find the option that best meets the user's agency purchasing policies.

The screenshot shows a form titled "SHIPPING - ENTIRE EREQUISITION" with the following fields:

- Ship To: * NCAS Ship To (dropdown menu)
- Deliver To: * NCAS Requester (text field)
- Need-by Date: [calendar icon] (calendar icon)
- Shipping Method: * BEST WAY (dropdown menu)
- FOB Code: * 001 (dropdown menu)
- Terms of Payment: * N30 (dropdown menu)

32. Comments may be added for the entire eRequisition using the **'Comments – Entire eRequisition'** field. The requester may add only one comment at the header level of the eRequisition. If more comments are needed, they may be added either at the line item level or at the header level by approvers of the eRequisition.

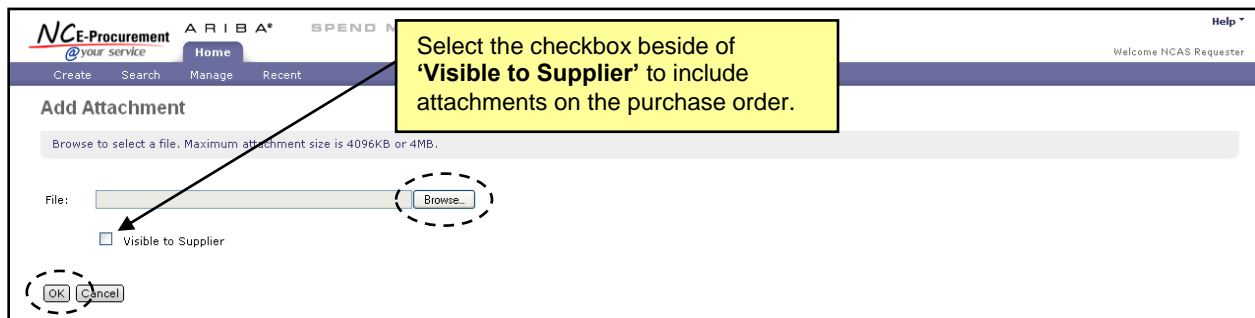
33. Attachments may be added to the eRequisition at the header level by clicking the **'Add Attachment'** button.



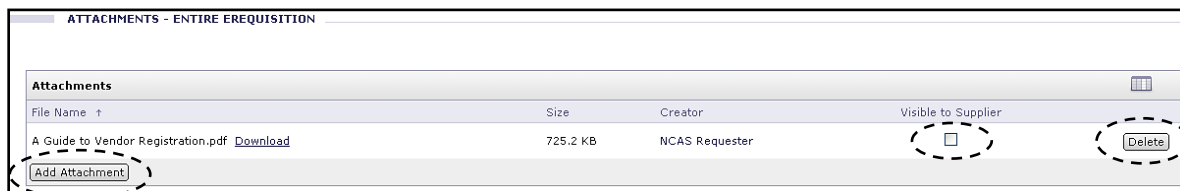
34. The **'Add Attachment'** page is displayed after the **'Add Attachment'** button has been clicked at the header level on the **'Summary'** page. Click the **'Browse'** button to locate and select an attachment, then click **'OK'** once the attachment is selected to populate the **'File'** field.

Note: The following file types are acceptable as attachments: .bmp, .csv, .doc, .docx, .dotx, .gif, .htm, .html, .jpeg, .jpg, .pdf, .png, .potx, .ppsx, .ppt, .pptx, .ps, .rtf, .sldx, .txt, .xls, .xlsx, .xltx, .xml, and .zip

Note: The maximum file size for attachments is 5MB. Adding more than 10MB of total attachments may cause a delay when sending purchase orders to vendors who receive their orders via the Ariba Supplier Network (ASN), and adding more than 5MB of total attachments may cause a delay when sending purchase orders to vendors who receive their orders via email.



35. Once an attachment has been added to an eRequisition, the user can add more attachments by clicking the **'Add Attachment'** button again. Users may also change an existing attachment's visibility to the supplier by checking or unchecking the **'Visible to Supplier'** checkbox. Finally, users may delete unwanted attachments by clicking the corresponding **'Delete'** button.



36. Update all other required and optional fields as necessary, and click the **'Submit'** button either at the top of the bottom of the page.



II. Blanket vs. Non-Blanket Line Items (NCAS Users)

When entering an eRequisition in Ariba, users **must** follow the below unit of measure guidelines:

Line Item Classification	Unit of Measure		
	Dollar	Hour	All Others
Non-Blanket/Good	NO	NO	YES
Blanket/Good	YES	NO	NO
Non-Blanket/Service	YES	NO	NO
Blanket/Service	NO	YES	NO

Non-Blanket Good

- Set the '**Quantity**' to the total number of units to order.
- Set the '**Unit of Measure**' to anything **except** 'Dollar' or 'Hour' (example: 'Each').
- Set the '**Price**' to the price of the individual unit.

When receiving this type of order, receive against the quantity ordered.

Blanket Good

- Set the '**Quantity**' to the total dollar amount of the order.
- Set the '**Unit of Measure**' to '**Dollar.**'
- Set the '**Price**' of the item to '**\$1.00.**'
- Mark the blanket purchase indicator to '**Yes.**'

Note: The '**Tax**' field should be set to '**Other.**'

When receiving this type of order, receive against the dollar amount.

Non-Blanket Service

- Set the '**Quantity**' to the total dollar amount of the service.
- Set the '**Unit of Measure**' to '**Dollar.**'
- Set the '**Price**' of the item to '**\$1.00.**'

When receiving this type of order, receive against the dollar amount.

Blanket Service

- Set the '**Quantity**' to the total number of hours to hire.
- Set the '**Unit of Measure**' to '**Hour.**'
- Set the '**Price**' to the price per hour.
- Mark the '**Blanket Purchase**' indicator to '**Yes.**'

When receiving against this type of order, receive against the number of hours.