Inventory Items in NC E-Procurement

DHHS and DPS users with the **'NCAS Warehouse Purchaser'** role can track inventory purchases using the **'ItemID'** and **'WarehouseID'** fields in NC E-Procurement. These fields can be added to both catalog and non-catalog line items. Purchases using these fields will be transmitted to NCAS and will update the *on-order* inventory level within the NCAS inventory module. Once the goods are physically received, and a receipt is entered into NC E-Procurement and processed through NCAS, the *on-hand* inventory level within NCAS will be updated.

I. Adding Inventory Items

1. From the NC E-Procurement Dashboard, click **'eRequisition'** from the **'Create'** Shortcut Menu 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: Item ID and Warehouse ID information can also be added to catalog line items on the **'Edit Line Items Details'** page.

Make note of the eRequisition number. The title has not yet been added.

3. Add an Item ID and a Warehouse ID to the line item.

Note: The **'WarehouseID'** field values will be scoped based on the selected **'ItemID.'**

4. The following fields will automatically populate based on the selected **'ItemID'** and **'Warehouse ID'** values.

   a. **Full Description** – Once populated, this field is editable by the user.

   b. **Commodity Code** – Once populated, this field is editable by the user.

   c. **Unit of Measure** – Once populated, this field is editable by the user; however, the selected **Unit of Measure** must match the Stock Keeping Unit associated with the inventory **Item ID.**

   d. **Stock Keeping Unit** - Inventory items are replenished using a Stock Keeping Unit (SKU). This field defaults based on the Item ID and is not editable.

   e. **Conversion Factor** - The unit of measure on catalog items must match the SKU of the selected inventory **Item ID**. In order to handle situations where the inventory **Item ID** has a different SKU than the Unit of Measure on the catalog item, the Conversion Factor is available. This field is pushed to NCAS and will convert the price of the line item based on the SKU.

   Example: The SKU for an **Item ID** is **'each,'** but the **Unit of Measure** on a catalog line item is **'box.'** The **Conversion Factor** would be the number of items in the box.

   f. **SKU Quantity –** This field is equal to the **Conversion Factor** multiplied by the **Quantity**. This field is not editable.

   g. **Company** – Once populated, this field is editable by the user.

   Note: If the Company is set as a default value in the user's profile, the inventory item will not overwrite the user's Company preference. It will, however, populate any remaining non-defaulted accounting fields. If the user does not have a default Company set in their profile, the selection of the inventory item will default the appropriate NCAS values.

   h. **Account** – Once populated, this field is editable by the user.

   i. **Center** – Once populated, this field is editable by the user.

   Note: If the Center is set as a default value in the user's profile, the inventory item will not overwrite the user's Center preference. It will, however, populate any remaining non-defaulted accounting fields. If the user does not have a default Center set in their profile, the inventory item will default the appropriate NCAS values.

   j. **Price** – Once populated, this field is editable by the user.

Note: If a user has manually entered a value in any of the above fields before the **'ItemID'** has been selected, or if they are editing a catalog line item, the default values will not overwrite the user-entered values.

Note: The **'ItemID,' 'WarehouseID,' 'Stock Keeping Unit,' 'Conversion Factor,'** and **'SKU Quantity'** fields are not editable via the Mass Edit process.

5.   Populate the remaining fields on the eRequisition as necessary.

     a. Select a **'Supplier'** using the drop-down menu. If the desired supplier is not displayed in the previous choices, click **'Search for more…'** to select the appropriate supplier**.**

     b. The **'Location'** field automatically populates when a Supplier is selected. To change the default Location, click the **'Select'** link to the right of the field.

     c. Enter the appropriate quantity in the **'Quantity'** field.

Note: Shipping/Freight charges should be included as a separate line item on the eRequisition using the freight commodity code, **'962-86 – Services: Transportation of Goods (Freight).'** This commodity code will exempt the supplier from the 1.75% transaction fee on shipping.

6.   Click **'OK.'**

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

7.   Click the **'Add Non-Catalog Item'** or **'Add from Catalog'** to return to the **'Add Items'** page if additional items are required.
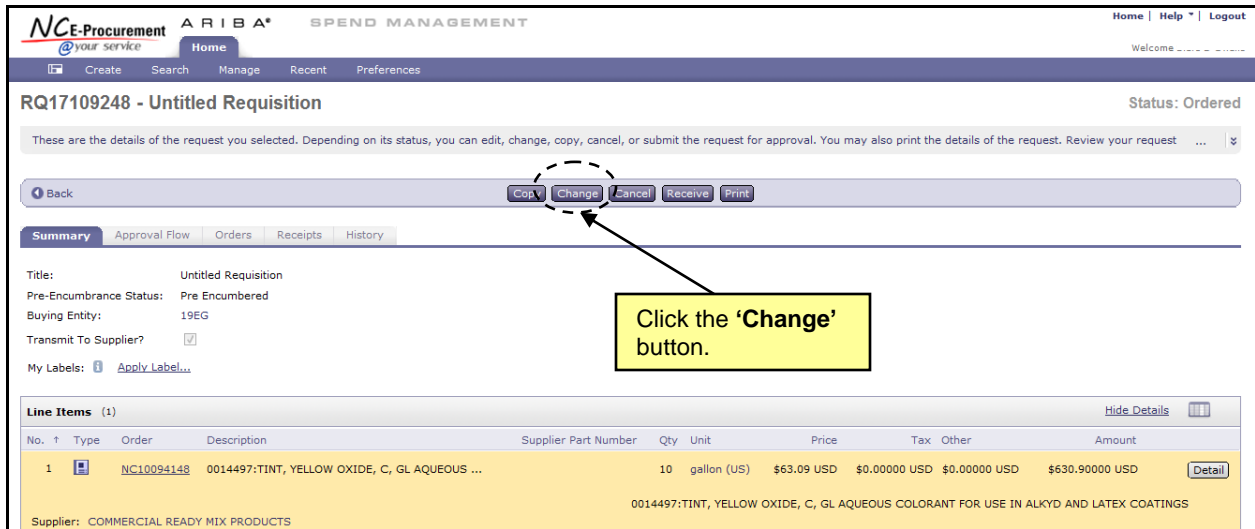
    Note: To prevent errors in the event of a change order, it is recommended that inventory and non-inventory items are entered on separate eRequisitions.

8.   Enter a value in the **'Title'** field and click **'Submit.'**

II. Change Orders for Inventory Items

Change orders can be created to decrease the quantity of Inventory Items.

1. Search for the eRequisition and click the '**Change**' button to initiate a Change Order.
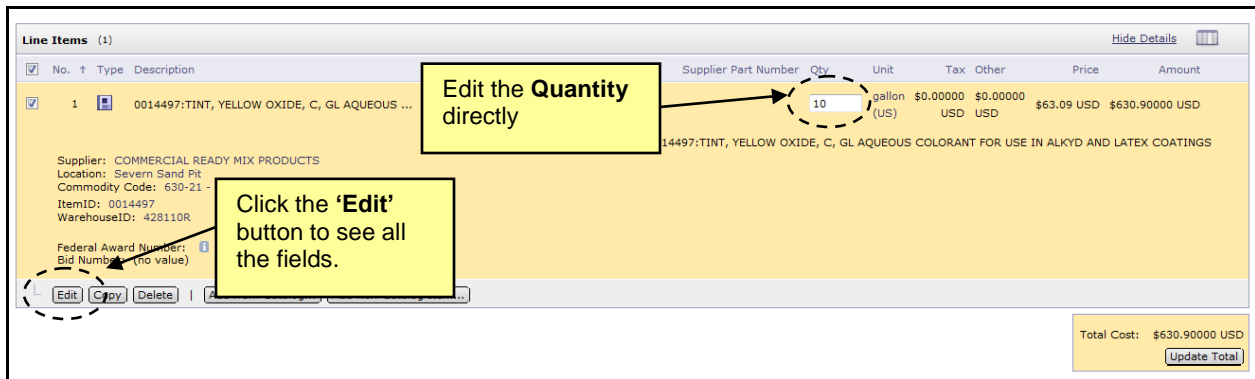

2. The quantity can be decreased directly from the **'Summary'** page or by clicking the '**Edit'** button.

Note: Adding new Inventory Items to an existing inventory order or increasing the quantity of an existing Inventory Item will cause the Change Order to fail validation within NCAS. A new eRequisition should be created if additional Inventory Items are required.

Note: Receiving and invoicing status rules still apply. Please see the **Receiving a Line Item** job aid for details.