I. School Bus eRequisition Item

Users may create eRequisitions for School Buses in NC E-Procurement. This process guide outlines the steps for creating an eRequisition for school bus purchases referencing the appropriate Contract ID to enable accurate statewide reporting for 070C and 070D.

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

   Make note of the eRequisition number. The title has not yet been added.
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 (e.g., 070-33 - School Buses, Complete, Conventional Type).

**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. Commodity codes that begin with a ‘9’ describe service type commodities. These codes should not be used when purchasing goods.

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. **Supplier Part Number:** Enter the Supplier Part Number (if known). This will assist the vendor in shipping the correct item.
8. **Recycled Content:** Select the appropriate radio button to reflect whether or not the item contains recycled products.

9. **Item Classification:** This field will automatically populate to either Good or Service based on the commodity code that has been chosen.

10. **Contract Type:** Select the appropriate contract type. Options are Statewide, Agency Specific, and IT Convenience.

**Note:** For School Bus purchases, ‘Statewide’ should be selected from the drop-down menu. This will add an additional ‘Contract’ field to the eRequisition, and contract ‘070C – Buses, School (Conventional)’ or ‘070-D – Buses, Activity (Conventional)’ should be added to the ‘Contract’ field. Entering the correct contract information allows the State of North Carolina to accurately track and report against these School Bus purchases.

11. **Blanket Purchase:** Choose whether the purchase is a Blanket or Non-Blanket.

12. **Quantity:** Enter the appropriate Quantity.

13. **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.

14. **Price:** Enter the Price of the item.

15. **Tax Rate:** Enter the Tax Rate for the item being purchased. If no taxes should be applied to the item, select ‘Other.’

16. **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 so that the supplier is not charged the 1.75% transaction fee for this service.

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

18. **Accounting – by Line Item:** Enter the ‘Account Code.’
19. Click ‘OK.’

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

20. Click the ‘Add Non-Catalog Item’ to return to the Add Items page and select additional items or update all other required and optional fields, such as ‘Title,’ and click ‘Submit.’