



Office of the Governor OpenBook Process Guide

NC OpenBook is an initiative designed to bring more transparency and accountability to state government in North Carolina. This job aid provides detailed information related to the three primary NC OpenBook fields within the NC E-Procurement system: Federal Award Number, Grant ID, and Bid Number. The functionality outlined below is specific to the Office of the Governor.

I. Federal Award Number

Users who are with the Office of the Governor may add a Federal Award Number to their transactions using the **'Federal Award Number'** drop-down menu. The drop-down menu provides users with all **ARRA** and **Non-ARRA** (American Recovery and Reinvestment Act) Numbers scoped to their agency.

1. Select the arrow next to the **'Federal Award Number'** field to open the drop-down menu and click **'Search for more...'** to choose a value for the Federal Award Number.

The screenshot displays the NCE-Procurement system interface for a requisition. The top navigation bar includes 'NCE-Procurement @ your service', 'ARIBA', and 'SPEND MANAGEMENT'. The main content area shows a requisition titled 'RQ20000969: Untitled Requisition' with a total of '\$0.00000 USD'. The 'Full Description' field contains 'test item'. The 'Commodity Code' is '020-43 - H', 'Supplier' is 'BRAME SP', and 'Location' is 'Brame Sp'. The 'Federal Award Number' field is highlighted with a dashed circle and a yellow callout box stating: 'The 'Federal Award Number' drop-down menu is available on the 'Add Non-Catalog Item' page, the 'Edit Line Item' page, and the 'Edit Items' page.' Another yellow callout box points to the dropdown arrow with the text: 'Select the arrow to open the drop-down menu and click 'Search for more...'. Below the 'Federal Award Number' field, there are fields for 'Government Grant ID' and 'Grant ID', both currently showing '(none selected)'. The 'ACCOUNTING BY LINE ITEM' section is visible at the bottom, with a note: 'Accounting data is not required. Please select the next step in the requisitioning process.'



- The **'Choose Value for Federal Award Number'** page displays the full list of Federal Award Numbers and allows users to search for and select the appropriate Federal Award Number for the line item. The user can search by CFDA, Federal Award Number, Award Title, Award Type or NC_ARRA.

Note: The **'Choose Value for Federal Award Number'** page will display a maximum of 500 Federal Award Numbers. If there are over 500 Federal Award Numbers available for the section, utilize the search functionality to narrow your results.

- To search by ARRA indicator, select **'NC_ARRA'** from the search field drop-down menu. Type the word **'yes'** to search for Federal Award Numbers tied to ARRA funds.
- To add a Federal Award Number to the line item, click the **'Select'** button next to the appropriate value.

Note: NC E-Procurement receives Federal Award Numbers from the Office of State Budget and Management (OSBM) nightly, Monday - Friday. A Non-ARRA Federal Award Number or an ARRA Federal Award Number established by 5PM will be available the next business day.

Choose Value for Federal Award Number:

Alert: Found more than 500 items. Only the first 500 items are displayed.

Field:

CFDA
Federal Award Number
Award Title
Award Type
NC_ARRA

CFDA	Award Number	Award Title	Award Type	NC_ARRA	Select
(no value)					<input type="button" value="Select"/>
10.001	SU18FD003600-02	NC BSE Ruminant Feed Ban Support	Cooperative Agreement	No	<input type="button" value="Select"/>
10.001	103V11221637065	Prescribed Fire and Organic Soil Co	Cooperative Agreement	No	<input type="button" value="Select"/>
10.001	NA04NMF4050202	Albemarle Sound Area Alosine Moni	Project Grant	No	<input type="button" value="Select"/>
10.001	State Appropriations	NC State Sex Offender Registry Funds	Block Grant	No	<input type="button" value="Select"/>
10.001	2010VAGX0109	Court Advocacy/Safety Planning	Formula Grant	No	<input type="button" value="Select"/>
10.001	2011-DB--BX-K042	FY2011 SUSPICIOUS ACTIVITY REPORTING TOOL PILOT PROJECT	Cooperative Agreement	No	<input type="button" value="Select"/>
10.001	State Appropriation	Grants to Prevent Gang Violence	Formula Grant	No	<input type="button" value="Select"/>
10.025	09-9419-0141	CSF & PRV Surveillance & Negative Cohort Study for Food and Mounty Disease	Project Grant	No	<input type="button" value="Select"/>
10.025	10-8237-0335-CA	Witchweed Eradication & European Gypsy Moth Survey Programs	Project Grant	No	<input type="button" value="Select"/>
10.025	10-8100-1477-CA	Host Perference for Megacopta Cribraria (Kudzu Bug)	Project Grant	No	<input type="button" value="Select"/>
10.025	GMSTS Regulatory 10-2	Gypsy Moth Regulatory	Project Grant	No	<input type="button" value="Select"/>
10.025	10-8237-0661-CA	Fire Ant BioControl with Phorid Flies	Project Grant	No	<input type="button" value="Select"/>
10.025	10-9637-1060	Animal Disease Traceability Program	Project Grant	No	<input type="button" value="Select"/>



II. Grants

Two fields appear within the NC E-Procurement system to track agency spending related to Grants: **'Government Grant ID'** and **'Grant ID.'** The **'Government Grant ID'** field allows users to track spend related to grants awarded to NC agency/local government organizations. The **'Grant ID'** field allows users to track spend related to Grants awarded to non-government organizations.

1. Enter a value in the **'Government Grant ID'** free-text field up to 15 characters long.

OR

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

Note: The **'Government Grant ID'** and **'Grant ID'** fields should not be populated simultaneously. Spend may only be related to one Grant Number; either **Grant ID** or **Government Grant ID**.

The screenshot displays the 'Spend Management' interface for an 'Untitled Requisition' (RQ20000969). The form includes fields for 'Full Description', 'Commodity Code', 'Supplier', 'Location', 'Bid Number', 'Supplier Part Number', 'Recycled Content?', 'Item Classification', 'Contract Type', and 'Blanket Purchase?'. The 'Government Grant ID' and 'Grant ID' fields are highlighted with dashed circles and arrows pointing to yellow callout boxes. The 'Government Grant ID' callout states: 'The 'Government Grant ID' box is a free text field.' The 'Grant ID' callout states: 'Use the arrow to open the drop-down menu for the 'Grant ID' pick list.' The 'Grant ID' field has a dropdown arrow and a 'Search for more...' option. The interface also shows 'Accounting - BY LINE ITEM' and 'Items: 0 Total: \$0.00000 USD'.



3. The **'Choose Value for Grant ID'** page allows users to search for and select the appropriate Grant ID for the line item. The user can search by **'Grant ID,' 'Program Name,'** or **'Grantee.'**
4. To add a Grant ID to the line item, click the **'Select'** button next to the appropriate value.

The screenshot displays the 'Choose Value for Grant ID' page. At the top, there is a search field with a dropdown menu set to 'Grant ID'. A yellow callout box with an arrow points to the dropdown menu, containing the text: "Users can search by 'Grant ID,' 'Program Name,' or 'Grantee.'". Below the search field is a table with the following columns: Grant ID, Program Name, and Grantee. Each row in the table has a 'Select' button to its right. The 'Select' button for the row with Grant ID 17095 is circled in red. The table contains the following data:

Grant ID	Program Name	Grantee	Select
(no value)			Select
17020	Regrants Programs 2008	North Carolina Humanities Council	Select
17025	T. E. A. C. H Early Childhood Corps 2008	Child Care Services Association	Select
17030	The Spirit of Excellence 2008	Black Child Development	Select
17095	Habitat AmeriCorps-North Carolina 2008	Habitat For Humanity International, Inc.	Select
17098	AmeriCorps & Children Together 2008	Stokes Partnership For Children	Select
17099	Project Power 2008	Children First Of Buncombe County, Inc.	Select
21108	WH/TPPI-Adolescent Pregnancy Prevention - 2009	Chatham County Together!	Select
24258	Arts in Communities	Arts Council Of Carteret County	Select
25119	AmeriCorps Project Conserve 2009	Carolina Mountain Land Conservancy	Select
25120	T. E. A. C. H Early Childhood Corps 2009	Child Care Services Association	Select
25126	Habitat AmeriCorps-North Carolina 2009	Habitat For Humanity International, Inc.	Select
25127	AmeriCorps and Children Together 2009	Stokes Partnership For Children	Select
25128	Project Power 2009	Children First Of Buncombe County, Inc.	Select
25129	Partnership to End Homelessness 2009	Servant Center, The	Select

III. Bid Number

Items purchased from a catalog in the NC E-Procurement system are associated with a specific State Term Contract ID and Bid Number. When a catalog line item is added to a requisition, the **'Contract ID'** and **'Bid Number'** fields are automatically pre-populated with the appropriate values. Non-Catalog line items have drop-down menus for both the Contract ID and Bid Number, allowing users to select the appropriate values for their transaction.

1. Select the arrow next to the **'Bid Number'** field to open the drop-down menu and click **'Search for more...'** to choose a value for the Bid Number.

The screenshot shows the 'ARIBA' SPEND MANAGEMENT interface for requisition RQ20004870. The 'Bid Number' field is circled in red, and a yellow callout box with an arrow points to its dropdown arrow. The callout text reads: 'Select the arrow to open the drop-down menu and click 'Search for more...''

Form fields include:

- Full Description: test item
- Commodity Code: (no value)
- Supplier: (No Preference)
- Location: (no value)
- Bid Number: (none selected)
- Supplier Part Number: Search for more...
- Price: \$0.00 USD
- Tax Rate: Other
- Tax Amount: \$0.00 USD
- Amount: \$0.00000 USD

Buttons: OK, Cancel, Update Total

- The **'Choose Value for Bid Number'** page allows users to search for and select the appropriate Bid Number for the line item. The user can search by Bid Number or Bid Description. Both IPS and ITS Bid numbers are displayed.
- To add a Bid Number to the line item, click the **'Select'** button next to the appropriate value.

The screenshot displays the 'Choose Value for Bid Number' window. At the top, it shows the NCE-Procurement logo and the text 'ARIBA* SPEND MANAGEMENT'. The search field is set to 'Bid Number' and contains the text 'RQ20004870: Unt'. Below the search field is a table of bid items. A yellow callout box points to the search field with the text 'Users can search by Bid Number or Bid Description.'

Bid Number	Bid Description	Select
(no value)		Select
200900729	Audit of the State Auditor's Office	Select
ITS-003527	Domain Name System Replacement Solution	Select
ITS-003901	ITIL Training Services	Select
ITS-003929	ITIL Professional Services	Select
ITS-003949	Cisco VoIP Telephone System	Select
ITS-003979	Television Video Production System	Select
ITS-003987-R	Video Equipment	Select
ITS-004003-R	Uninterruptible Power Source System	Select
ITS-004022	Cabling and Network Equipment Installation	Select
ITS-004038	Local and Latawide Voice Services	Select
ITS-004039	IBM Suremark Point of Sale Printers and Maintenance	Select
ITS-004041	Packeteer, PacketShaper Bandwidth Optimizer	Select
ITS-004046	LANDesk Software and Maintenance Support Services	Select
ITS-004053	TAC-PAK Versatile Mobile Communications System	Select



Note: A contract type must be chosen from the **'Contract Type'** drop-down menu before the **'Contract'** field will appear on the eRequisition. The choices are **'Statewide,' 'Agency Specific,'** or **'IT Convenience.'**

NCE-Procurement @your service **ARIBA** SPEND MANAGEMENT Home | Help | Logout

Create Search Manage Recent Preferences

RQ20004970: Untitled Requisition **Items: 0 Total: \$0.00000 USD** [OK] [Cancel]

If you cannot locate an item in the catalog, request a non-catalog item using the fields below. Non-catalog items may take longer to process because your purchasing department may get involved to ...

Full Description: test item Quantity: 1
Unit of Measure: each
Commodity Code: [no value] Price: \$0.00 USD
Supplier: [No Preference] Tax Rate: Other
Location: [no value] Tax Amount: \$0.00 USD
Bid Number: [none selected] Amount: \$0.00000 USD
Supplier Part Number: []
Recycled Content? Yes No
Item Classification: Good
Contract Type: [No] (dropdown menu open showing: No, Statewide, Agency Specific, IT Convenience)
Blanket Purchase? []

ACCOUNTING - BY LINE ITEM

Accounting data is not required. Please select.

Federal Award Number: [none selected]
Government Grant ID: []
Grant ID: [none selected]

[Update Total] [OK] [Cancel]

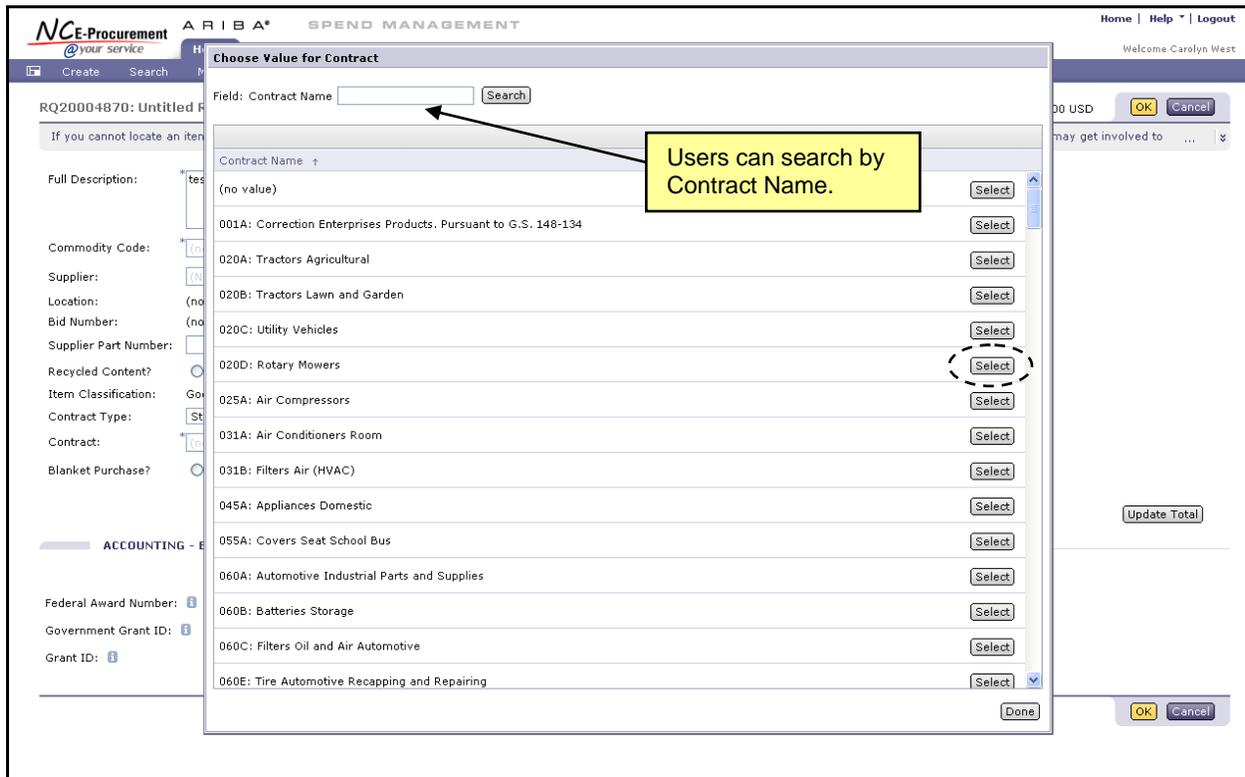
Selecting 'Statewide,' 'Agency Specific,' or 'IT Convenience' from the 'Contract Type' drop-down menu will allow the 'Contract' field to appear on the eRequisition.



4. If **'Statewide'** or **'IT Convenience'** is selected for **'Contract Type'**, use the arrow next to the **'Contract'** field to open the drop-down menu and click **'Search for more...'** to choose a value for the Contract ID.

The screenshot shows the ARIBA Spend Management interface for a requisition titled "RQ20004870: Untitled Requisition". The form includes fields for Full Description (test item), Quantity (1), Unit of Measure (each), Price (\$0.00 USD), Tax Rate (Other), and Tax Amount (\$0.00 USD). The Contract Type is set to "Statewide". The Contract field is currently "(none selected)" and has a dropdown arrow. A yellow callout box points to this arrow with the text: "Select the arrow to open the drop-down menu and click 'Search for more...'". Below the main form is the "ACCOUNTING - BY LINE ITEM" section, which includes fields for Federal Award Number, Government Grant ID, and Grant ID, all currently set to "(none selected)".

5. The **'Choose Value for Contract'** page allows users to search for and select the appropriate Contract ID Number for the line item. The user can search by Contract Name.
6. To add a Contract to the line item, click the **'Select'** button next to the appropriate value.



7. If a Statewide Term Contract is selected, the **'Bid Number'** field automatically populates with the Bid Number associated with that Contract.

Note: If the Bid Number tied to the selected contract is updated while the order is in progress or when a change order is created, the user can reselect the correct/newly active Bid Number from the Bid Number dropdown box.