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.
2. 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.

3. 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.

4. 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.
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.
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.
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.
2. 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.

3. To add a Bid Number to the line item, click the ‘Select’ button next to the appropriate value.

Users can search by Bid Number or Bid Description.
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.’
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.
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.