NC E-Procurement for Non-Integrated Users

NC E-Procurement is the procurement system for the State of North Carolina. The main component for buyers is the Ariba Buyer software, which enables an online purchasing website that can be accessed by users in North Carolina State Agencies, Community Colleges, School Systems, and local governments.

The service is a user-friendly Internet-based purchasing system that offers cost savings and an efficient purchasing process to users. It is designed to enable users to complete a variety of purchasing functions based on an organization's business and job functions. The system brings together buyers and suppliers via the Internet in order to make the traditional procurement process more efficient. It also provides users with a faster purchasing process, more purchasing options and easy access to catalogs, contracts and reports.

NC E-Procurement integrates with the financial system of North Carolina State Agencies, which is the North Carolina Accounting System (NCAS). Additionally, NC E-Procurement integrates in a limited capacity with the financial systems of Community Colleges and K-12 School Systems (i.e., EP Lite entities). All other entities will continue to use NC E-Procurement as '**Non-Integrated.'** Non-integrated agencies have access to create and issue purchase orders within NC E-Procurement but will need to continue using their specific financial system to encumber the necessary funds. NC E-Procurement provides access to Statewide Term Contract catalogs and electronic approval flows.

Purchasing Lifecycle for Non-Integrated Agencies:

1. In the beginning of the purchasing lifecycle, an eRequisition is created by the requester and has a status of **'Composing.'**
2. Once the eRequisition is complete, it is '**Submitted'** for approval.
3. Designated approvers review and either approve or deny the eRequisition.
4. A purchase order is then generated in NC E-Procurement and the status of the eRequisition is changed to **'Ordered.'**

Note: If the eRequisition is denied rather than approved, the status of the eRequisition changes to **'Denied.'**

5. The purchase order is electronically transmitted to the vendor using their preferred ordering method chosen by the vendor in their Vendor Registration account.

I. Logging into NC E-Procurement

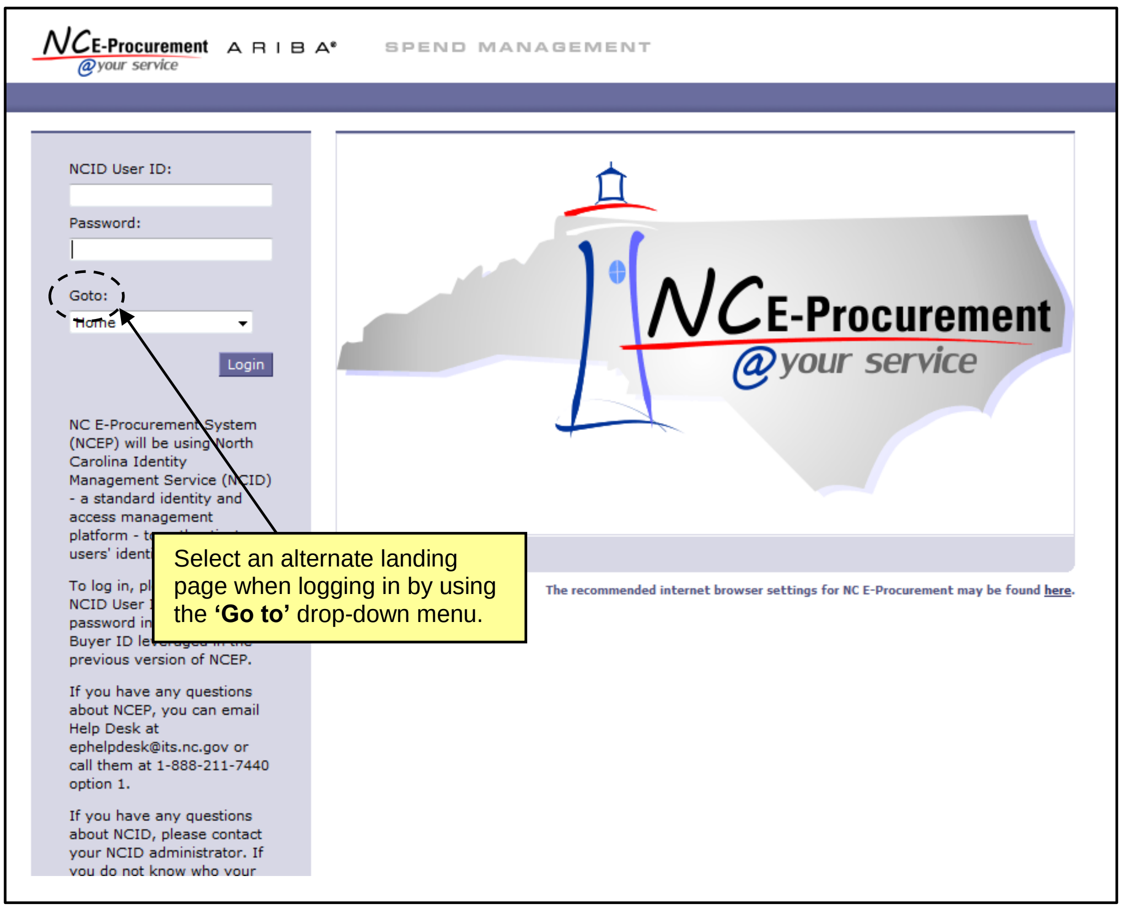
As NC E-Procurement is an Internet based purchasing system, it can be accessed by users anywhere there is Internet access.

The URL for NC E-Procurement is **https://buyer.ncgov.com/Ariba**

1. Enter the North Carolina Identity Management Service (NCID) User ID and password assigned by the NCID Delegated Administrator and click '**Login.**'

Note: Each user is assigned a unique NCID User ID and password with which to log into NC E-Procurement. Users may work with the NC Identity Management team and his/her entity's NCID Delegated Administrator (DA) to set up users for his/her specific agency. To add a new user, refer to the **'User Maintenance eForm'** process guide.

Note: When logging into NC E-Procurement, users will automatically be taken to the Ariba Dashboard. Alternatively, users can select a different page to be displayed upon login by using the **'Go to'** drop-down menu (e.g., Approval queue).

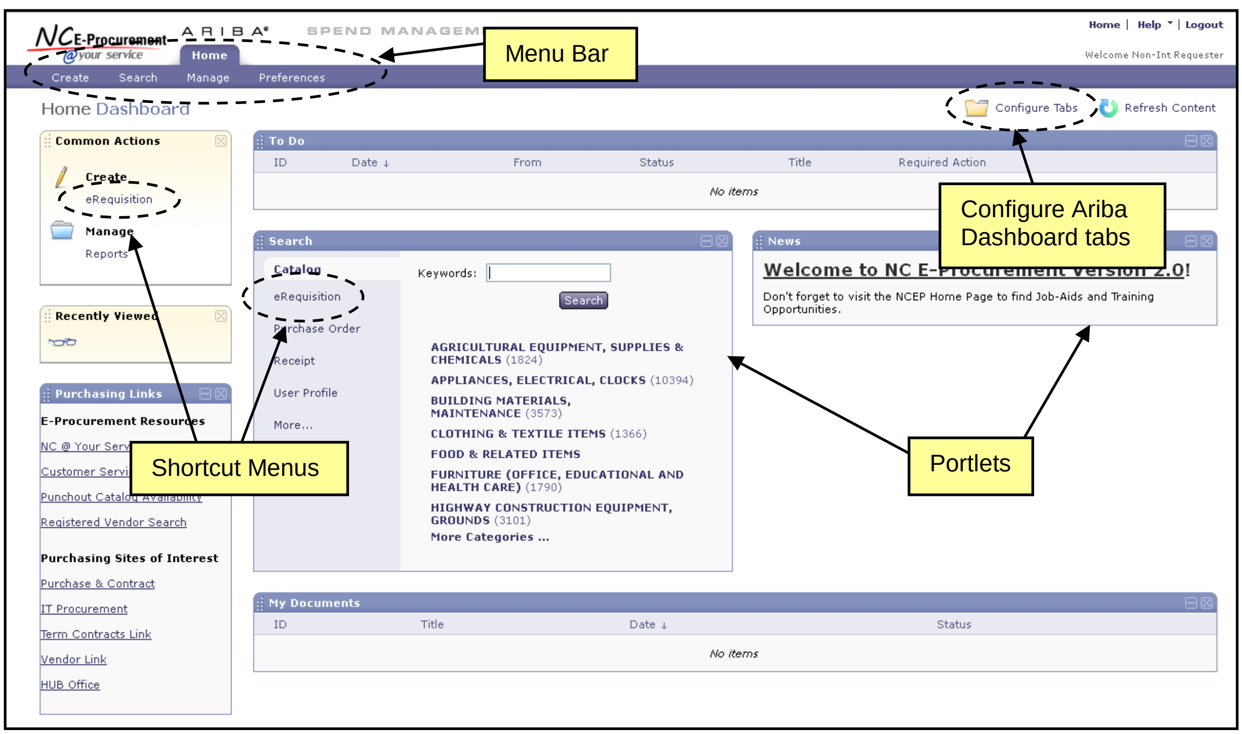


II. Ariba Dashboard

The Ariba Dashboard allows users to select which task they want to complete. There are customizable Ariba Dashboard tabs within the Ariba Dashboard. Additionally, portlets in the Ariba Dashboard can be added, removed, and moved around depending on the user's preferences. The portlets contain direct links for the user to access information at different phases of the purchasing cycle. Within each Ariba Dashboard tab there is a Menu Bar. The Menu Bar is the same for each tab, and includes a **'Create'** Shortcut Menu, **'Search'** Shortcut Menu, **'Manage'** Shortcut Menu, and **'Preferences'** Shortcut Menu. Each of these sections allows users to quickly access the part of the system that they need.

- **Create:** Allows users to create eRequisitions and eForms, based on the user's permissions.
- **Search:** Allows users to search for approvables, such as eRequisitions and Purchase Orders.
- **Manage:** Allows users to run reports, based on their permissions.
- **Preferences:** Allows users to locate and edit their profile, as well as set appearance and email preferences.

Note: Reference the **'NC E-Procurement Overview'** process guide for more information regarding navigating and customizing the Ariba Dashboard.



III. Creating an eRequisition

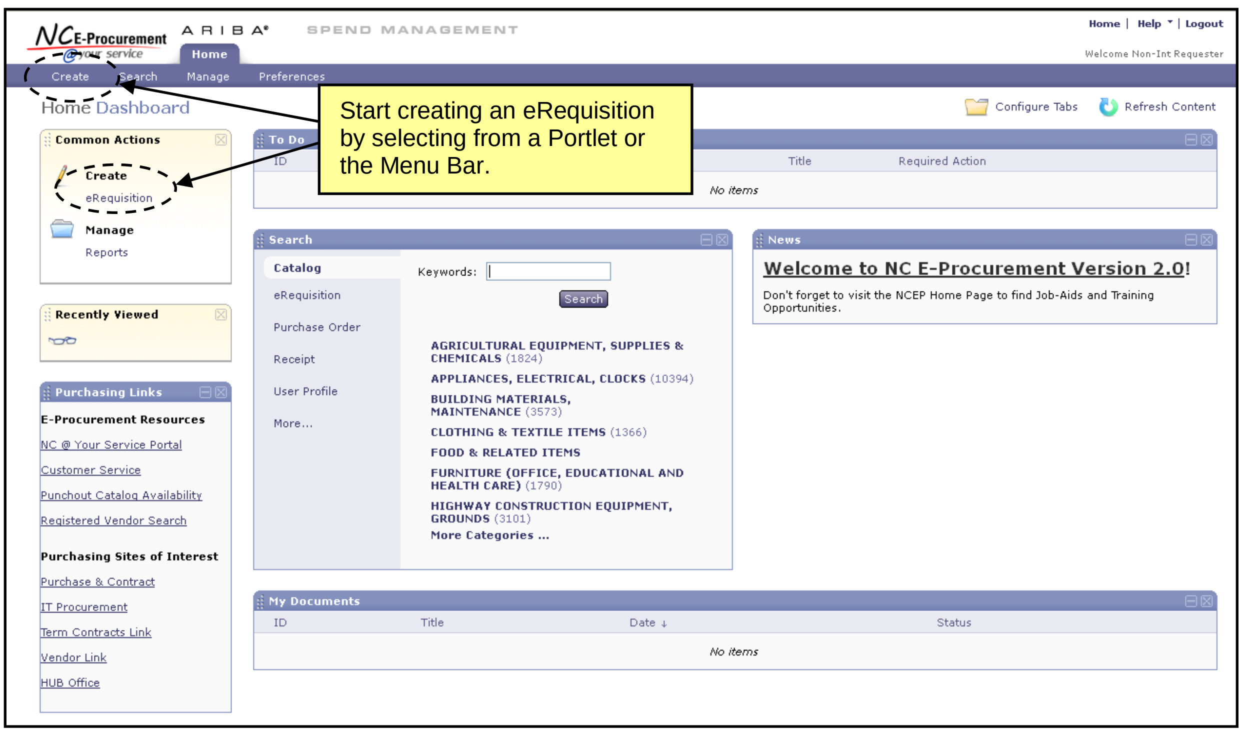
An eRequisition is created when the user selects items to order within NC E-Procurement. The user initiating the eRequisition is referred to as the **'Requester.'** All items on a Non-Integrated eRequisition should be purchased from a single supplier.

The **'My Documents'** portlet on the Ariba Dashboard will display any eRequisitions created by the user that is currently logged in, as well as displaying the status of that item. The user can click on the eRequisition ID to easily access the requisition. There are two main steps required to create an eRequisition:

1. **Add items** – Select and add items to the shopping cart.

2. **Summary** – Enter title, shipping, comment, and attachment information, as well as review the eRequisition for accuracy.

The Ariba Dashboard, shown below, is the first page displayed once the user logs into NC E-Procurement. To begin an eRequisition, the user should click **'eRequisition'** either in the **'Create'** Shortcut Menu from the **'Common Actions'** portlet, or from the **'Create'** shortcut menu on the Menu Bar.



1.0 Adding Line Items to an eRequisition

Users must choose what type of line item they would like to add to their eRequisition. There are four types of items that can be added to the eRequisition: Catalog, Non-Catalog, and Punchout. Below is a brief description of each line item type:

A. Catalog Item – A catalog item is a Statewide Term Contract item that has been loaded into the NC E-Procurement online catalog. Catalog items contain the description, vendor, price, and commodity code information from the appropriate Statewide Term Contract.

> **Note:** Please see the **'eRequisition Catalog Item'** process guide for more information on catalog items.

B. Non-Catalog Item – A non-catalog item is an item that is not on Statewide Term Contract. Users must enter the item description, vendor, price, and commodity code information for these type items.

> **Note:** Please see the **'eRequisition Non-Catalog Item'** process guide for more information on non-catalog items.

C. Punchout – A punchout site is a website created and maintained by state contract suppliers specifically for the State of North Carolina. This allows buyers to access these catalogs from NC E-Procurement in order to view term contract item(s) on the supplier's website. This is similar to shopping on the supplier's website; however, users access the specific site through NC E-Procurement.

> **Note:** Please see the **'eRequisition Punchout Item'** process guide for more information on punchout items.

1.1 Catalog Items

Users can add catalog (Statewide Term Contract) items to their eRequisition from the **'Add Items'** page using the catalog search functionality. From the **'Add Items'** page, the user can also navigate to the Punchout options, as well as choose to create a non-catalog item.

Users can search the catalog using several methods, in addition to being able to browse the catalog by clicking a Supplier Name or Category. The user can click **'Options'** to view additional search field options.

1. Keywords (e.g., pen) may be entered in the first free-text field next to the **'Search'** button.

2. **Supplier Part #:** If the user knows the Supplier Part Number of the item, enter it here.

3. **Manufacturer Part #:** If the user knows the Manufacturer Part Number of the item, enter it here.

4. **Contract ID:** Enter the specific State of North Carolina Statewide Term Contract ID here to search for all catalog items on a specific Statewide Term Contract. A list of Contract IDs may be found at http://www.pandc.nc.gov/numlistt.aspx.

5. **Commodity Code:** The National Institute of Governmental Purchasing (NIGP) provides a standardized list of Commodity Codes. Commodity Codes provide a means for classifying goods and services to promote purchasing efficiency. A list of Commodity Codes and the goods/services they represent may be found at http://www.pandc.nc.gov/ipsalpha.aspx.

6. Enter the desired search criteria and click **'Search.'**

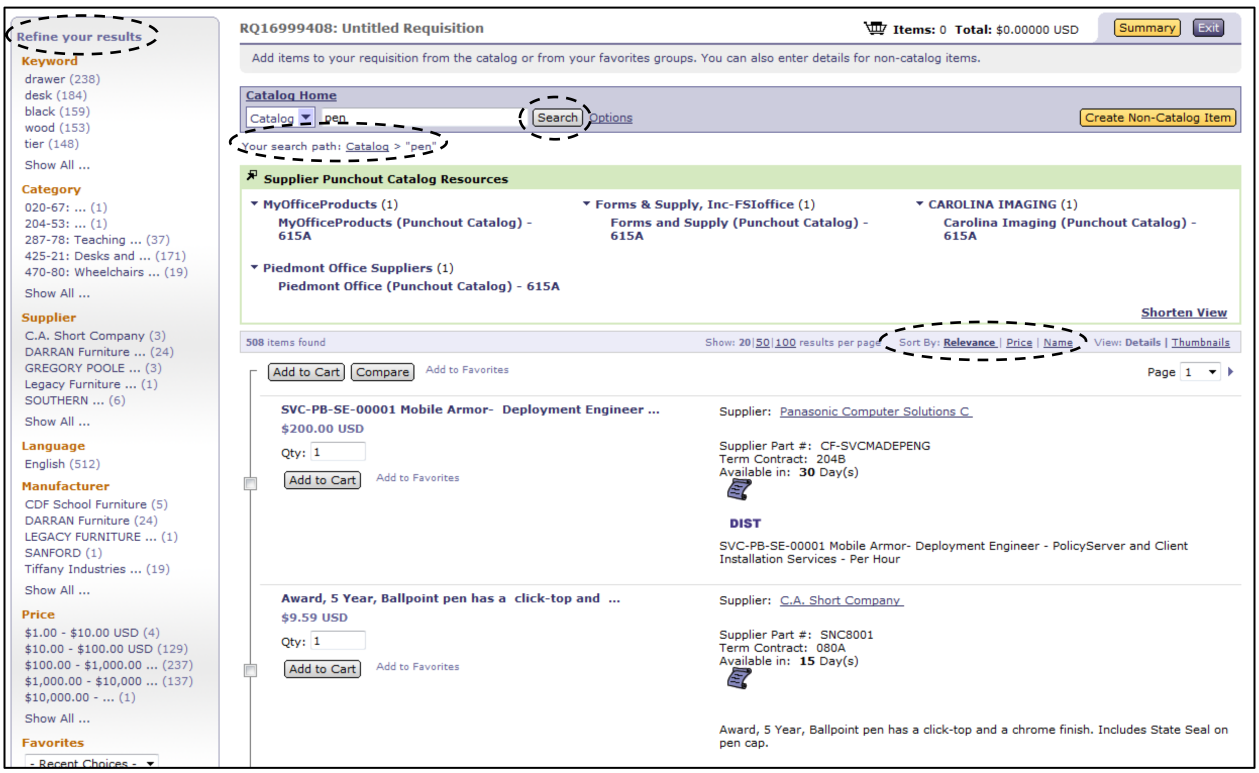
7. After conducting a search, the results page (shown in the below screenshot) will be displayed. It will provide further options for refining the search and evaluating the results.

8. The **'Refine your results'** Shortcut Menu will allow the user to refine the results based on various characteristics, such as **Supplier** or **Keyword.** Options available here will depend on the results returned. Select an option from this menu to see only those results that match the criteria.

9. **'Your search path'** displays the trail of the user's current search. Click any of the links to move back through the trail of the search.

10. Clicking a link next to **'Sort By'** allows users to sort the search results based on **Relevance, Price,** or **Name.**

    a. **Relevance** places the items with the best or most complete match near the top.
    b. **Price** places the least expensive items closer to the top.
    c. **Name** sorts the list alphabetically by name.

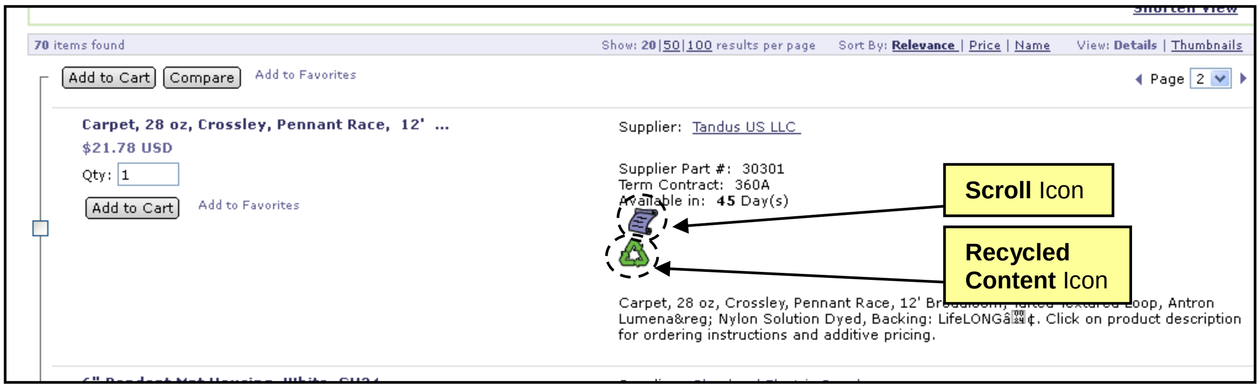


Note: There are several icons that may be displayed on a catalog line item that indicate additional information about the item or supplier.

11. Click the **Scroll** icon to see a PDF version of the Statewide Term Contract.

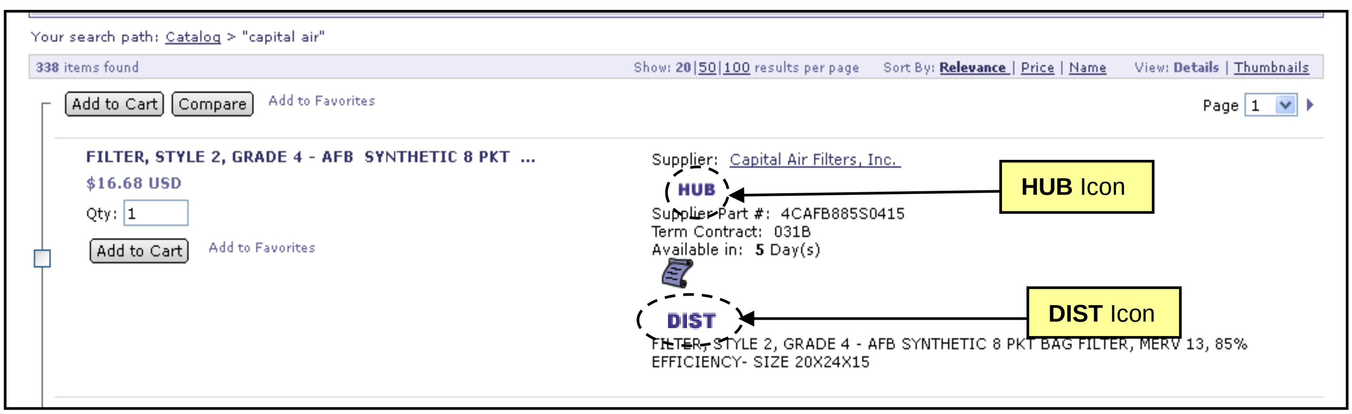
    Note: The PDF file will open in a pop-up window. Pop-up window blockers must be turned off to allow the window to appear. Adobe® Reader® is required to view PDF files. Adobe® Reader® is available for free download at http://get.adobe.com/reader/.

12. The **Recycled Content** icon indicates that the item is made from recycled materials.

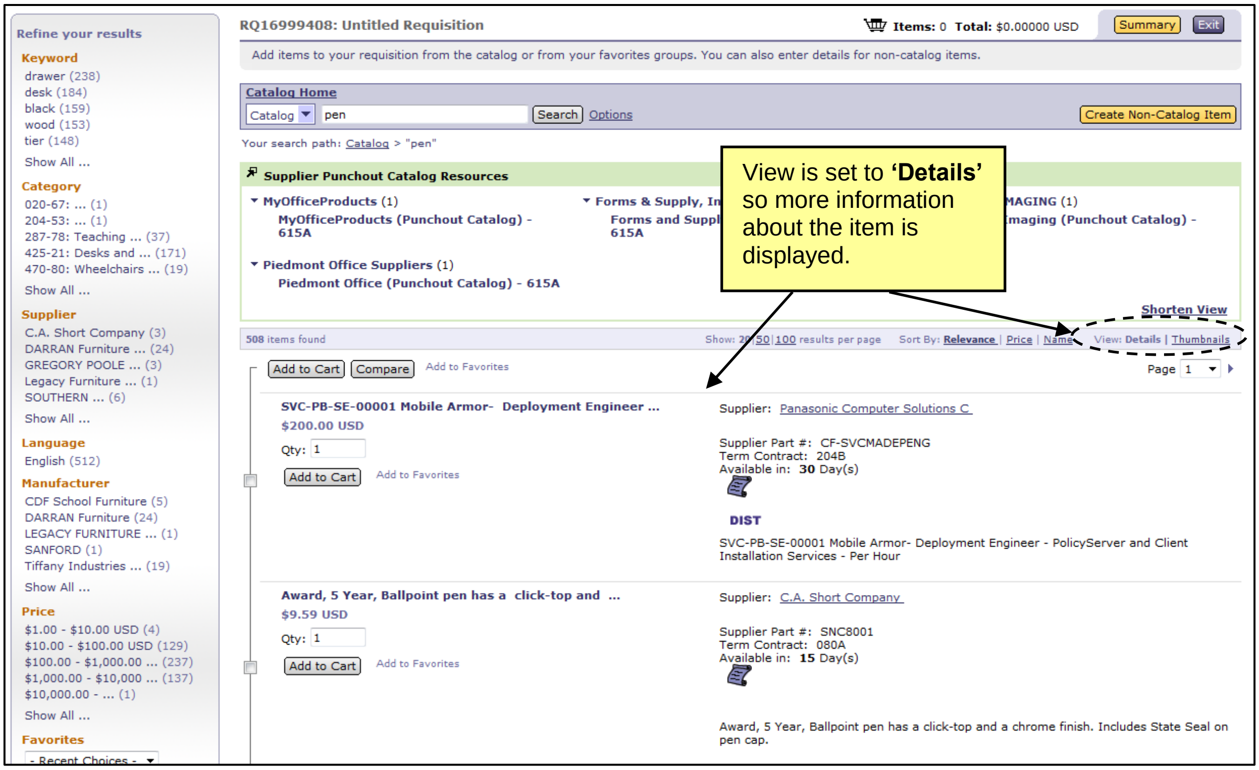


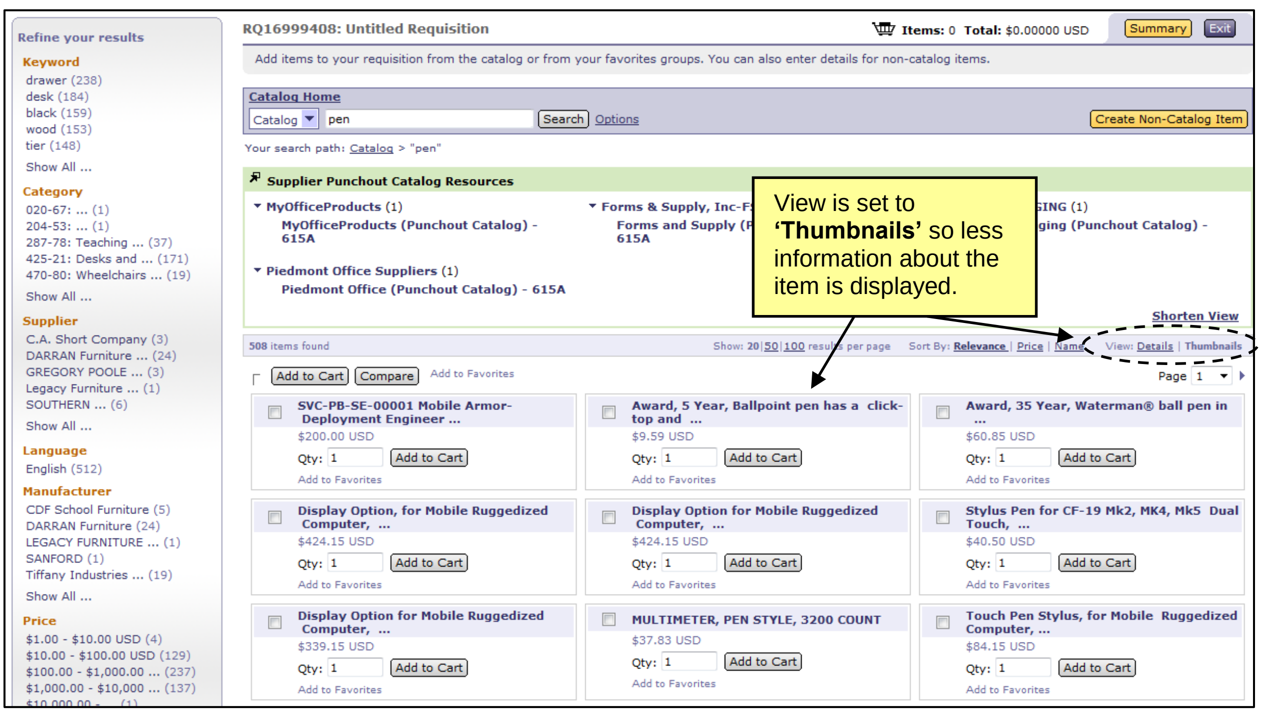
13. The **DIST** icon indicates that an item is supplied by a distributor. Once the item is added to the shopping cart, the user will need to select the appropriate distributor through the **'Supplier'** field.

14. The **HUB** icon indicates that the item is supplied by a registered Historically Underutilized Business (HUB).



15. Using the **'View'** options, the user can choose whether to view the item in a more detailed view, or as a Thumbnail view.



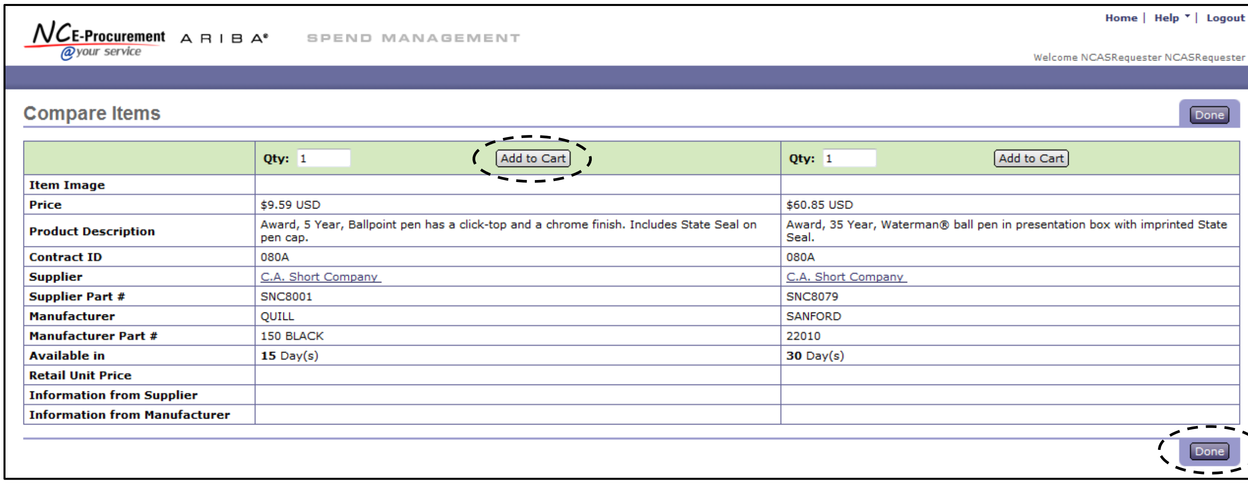


16. The user can add items to their eRequisition at any time by checking the box next to the desired item and clicking the **'Add to Cart'** button next to that item. To add multiple items, the user can check the box next to more than one item and then click **'Add to Cart'** at the top of the search results.

17. The user can compare two or more items side by side to quickly review the attributes of those items. Check the boxes next to the items to be compared and click the **'Compare'** button.

18. Once **'Compare'** has been clicked, the **'Compare Items'** page will be displayed. Once the user has reviewed the information, click **'Done'** to return to the search results.

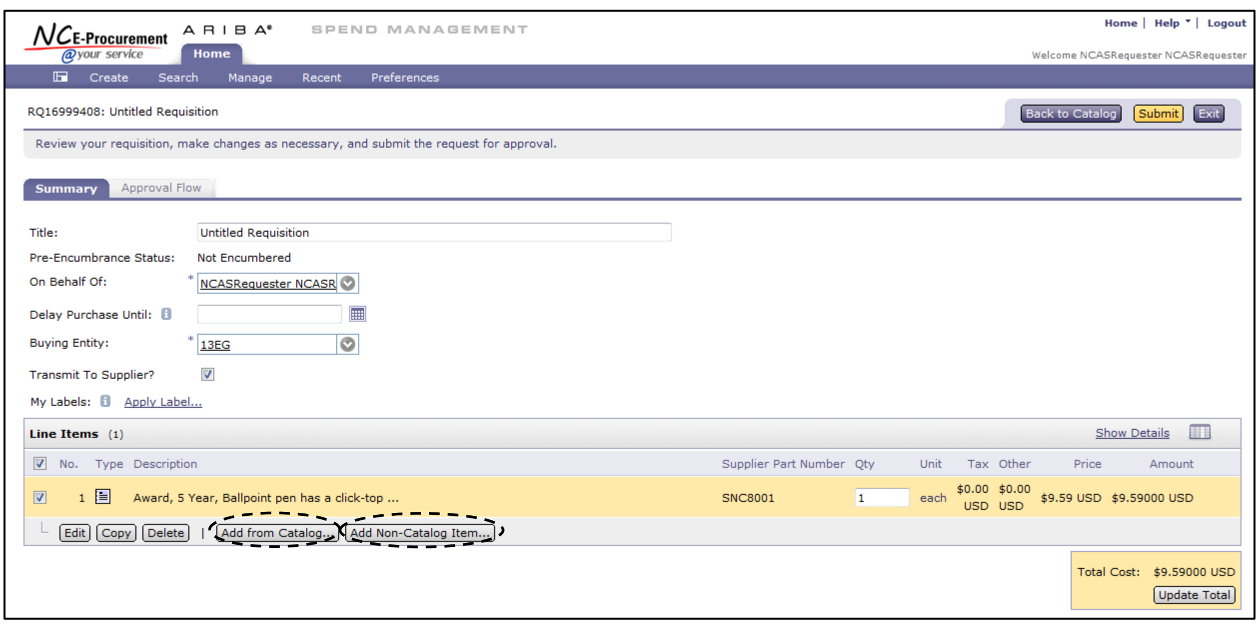
19. In order to add items directly from the **'Compare Items'** page, update the quantity for the desired item and click **'Add to Cart.'**



	Qty: 1 Add to Cart	Qty: 1 Add to Cart
Item Image		
Price	$9.59 USD	$60.85 USD
Product Description	Award, 5 Year, Ballpoint pen has a click-top and a chrome finish. Includes State Seal on pen cap.	Award, 35 Year, Waterman® ball pen in presentation box with imprinted State Seal.
Contract ID	080A	080A
Supplier	C.A. Short Company	C.A. Short Company
Supplier Part #	SNC8001	SNC8079
Manufacturer	QUILL	SANFORD
Manufacturer Part #	150 BLACK	22010
Available in	**15** Day(s)	**30** Day(s)
Retail Unit Price		
Information from Supplier		
Information from Manufacturer		

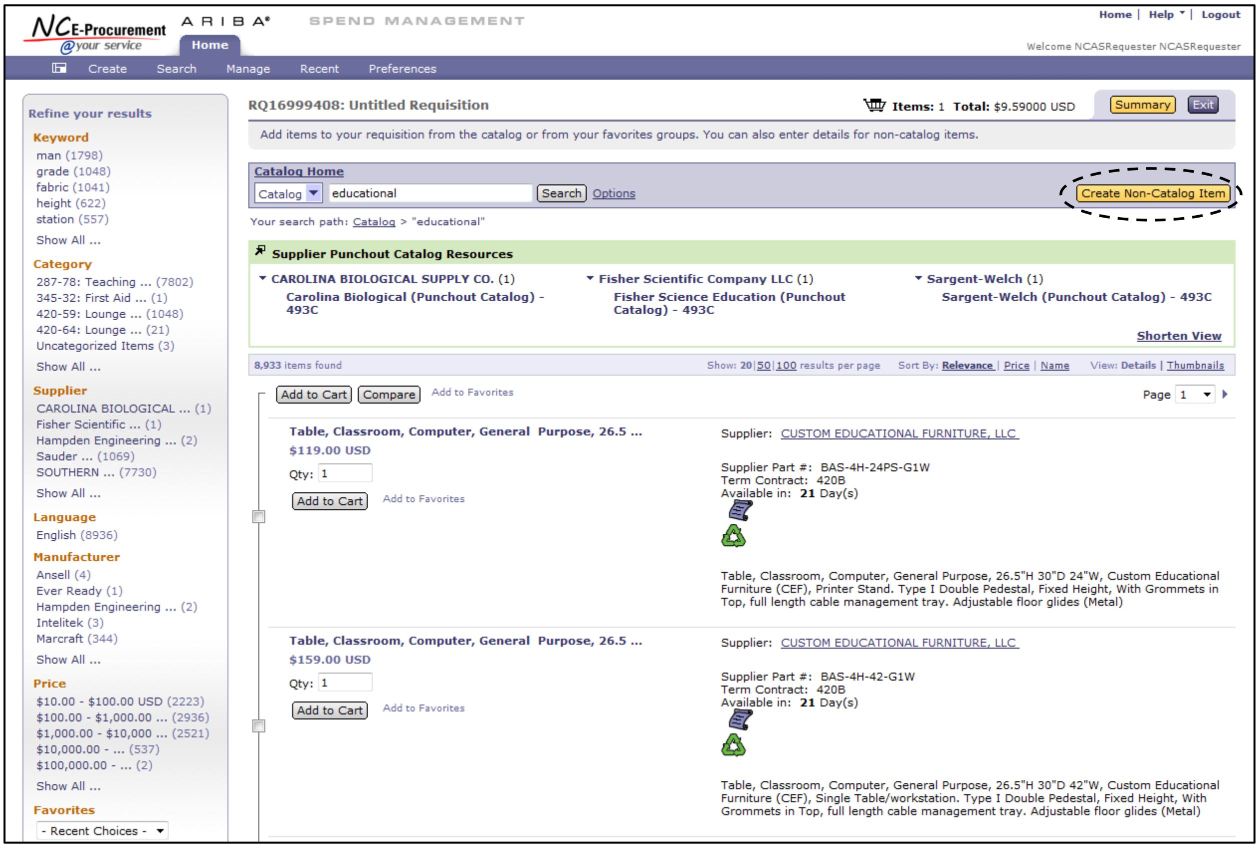
20. Once **'Add to Cart'** is selected, the **'Summary'** page will be displayed and the selected item(s) will display on the eRequisition.

21. More items can be added to the eRequisition at this point by clicking **'Add from Catalog'** or **'Add Non-Catalog Item.'**



1.2 Non-Catalog Items

1. Click the **'Create Non-Catalog Item'** button to enter information for a non-catalog item.



2. Populate the available fields based on the item that is being ordered.

   a. **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.

   b. **Commodity Code:** Locate the appropriate commodity code that describes the item being purchased by using the dropdown box. If a desired commodity code is not listed in the dropdown box, select **'Search for more…'** to search for the appropriate code.

Note: It is important to select the appropriate commodity code as the State of North Carolina uses this for reporting purposes. Commodity codes that begin with a "9" describe service type commodities. These codes should not be used when purchasing goods.

   c. **Supplier**: Locate the supplier in the dropdown box. If the supplier is not listed in the dropdown box, choose **'Search for more…'** to search for the appropriate supplier**.**

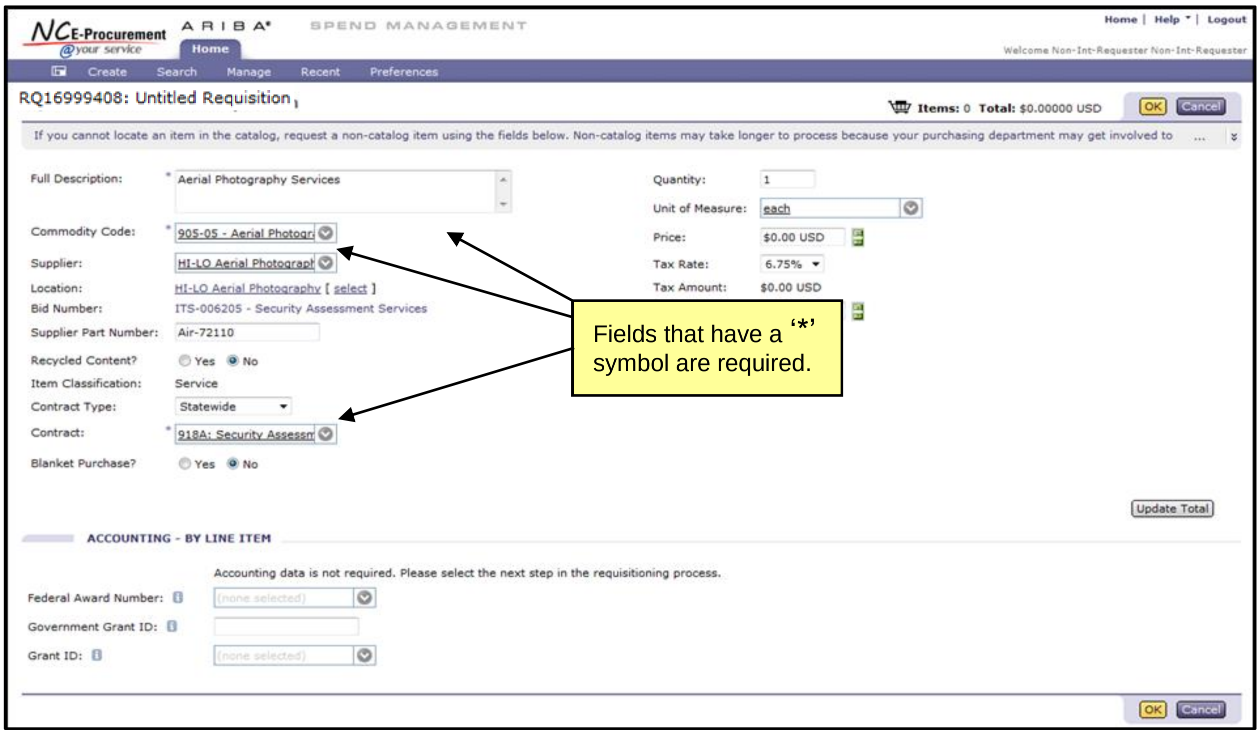
   d. **Location:** If the default location is not the appropriate one, click on **'Select'** and choose the appropriate location.

   e. **Supplier Part Number:** Enter the appropriate supplier part number. This will assist in receiving the correct item.

f. **Recycled Content:** Select the appropriate radio button to reflect if the item contains recycled products.

g. **Item Classification:** The commodity code selected will automatically update the item classification to reflect if the item is a Good or Service.

h. **Contract:** Select the appropriate Contract Type if the item is on contract (Statewide, IT Convenience, or Agency Specific) and select the correct Contract ID from the field that appears.



i. **Blanket Purchase:** Select the appropriate radio button to reflect if the item is a blanket order.

j. **Quantity:** Enter the appropriate quantity.

k. **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…'**

l. **Price:** Enter the price of the item.

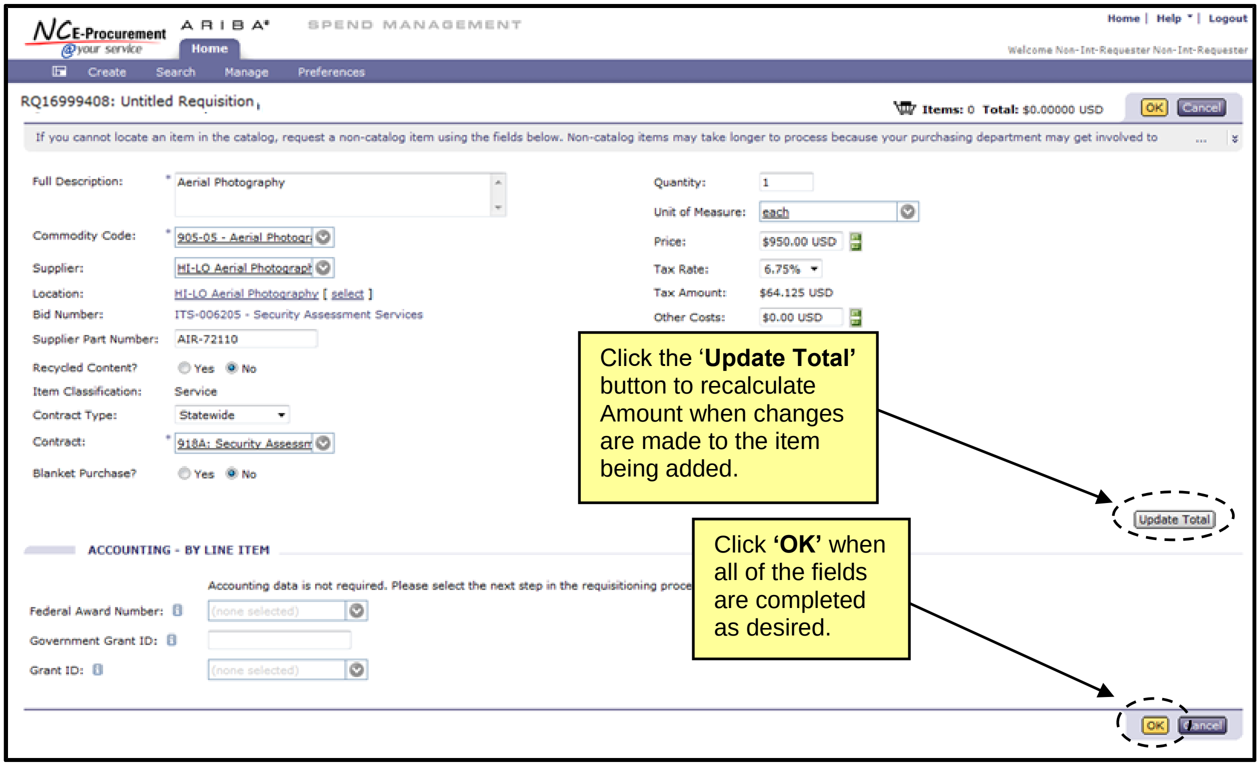
m. **Tax Rate:** Enter the tax rate for the item being purchased. If no taxes should be applied to the item, select **'Other.'** Unless specifically requested by the user's entity, the tax rate will default to the current North Carolina sales tax rate.

n. **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: Shipping/Freight charges should be included as a separate line item using the freight commodity code, **'962-86 – Services: Transportation of Goods (Freight).'** This will prevent the supplier from being charged the 1.75% transaction fee for this service.

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

3. Click **'OK.'**



1.3 Punchout Items

1. Conduct a catalog search for the supplier's punchout site.

   Note: To see all available punchout catalogs, use **'Punchout'** as the search term.

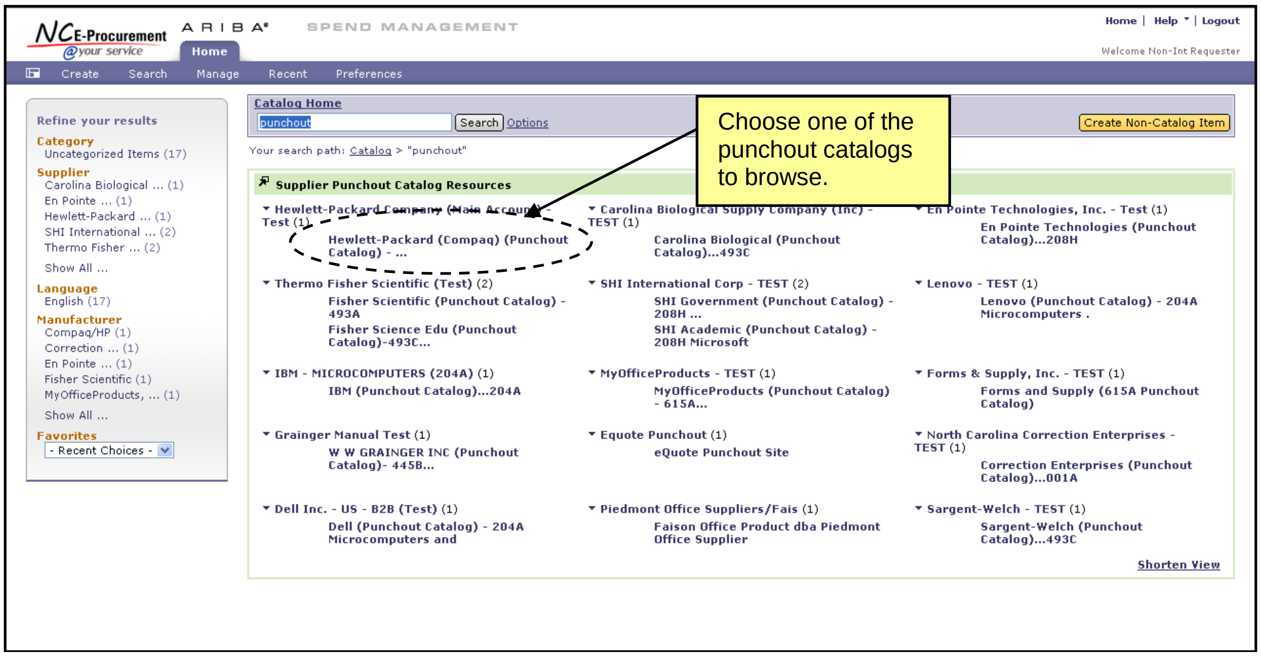
2. Click the name of the punchout supplier to access the supplier's punchout website.

   Note: Some supplier punchout sites may be blocked if the user's internet browser security settings are prohibitive. The user should check with their agency's IT department before making any security setting changes.

   Note: The individual suppliers maintain their own Supplier punchout sites. NC E-Procurement maintains a list of current punchout sites and their availability. This list can be found on the NC E-Procurement Homepage or by following the below link: http://eprocurement.nc.gov/Buyer/Punchout_Catalog_Status.html.

Since individual suppliers maintain their own punchout sites, each site may differ in appearance and navigation; however, the same basic logic is used to navigate each site. When shopping on a punchout site, users will add the desired items to the shopping cart and **'Submit'** the shopping cart back to NC E-Procurement. Once the checkout process is complete on the punchout site, the items will appear on the eRequisition.

> **Note:** To make changes to line items from a punchout site, the user must return to the supplier's punchout site. To do so, click on the description of one of the listed punchout line items.



2.0 Summary

The **'Summary'** page allows the user to enter a title for the eRequisition, as well as shipping, comment, and attachment information. It also allows the user to review the eRequisition for accuracy. The approval flow for the eRequisition can be viewed from the **'Approval Flow'** tab on the **'Summary'** page as well.

1. Once on the **'Summary'** page, the user can populate the **'Title'** field for the requisition. The title should be descriptive of the items being purchased, and can be used to make the requisition easily identifiable.

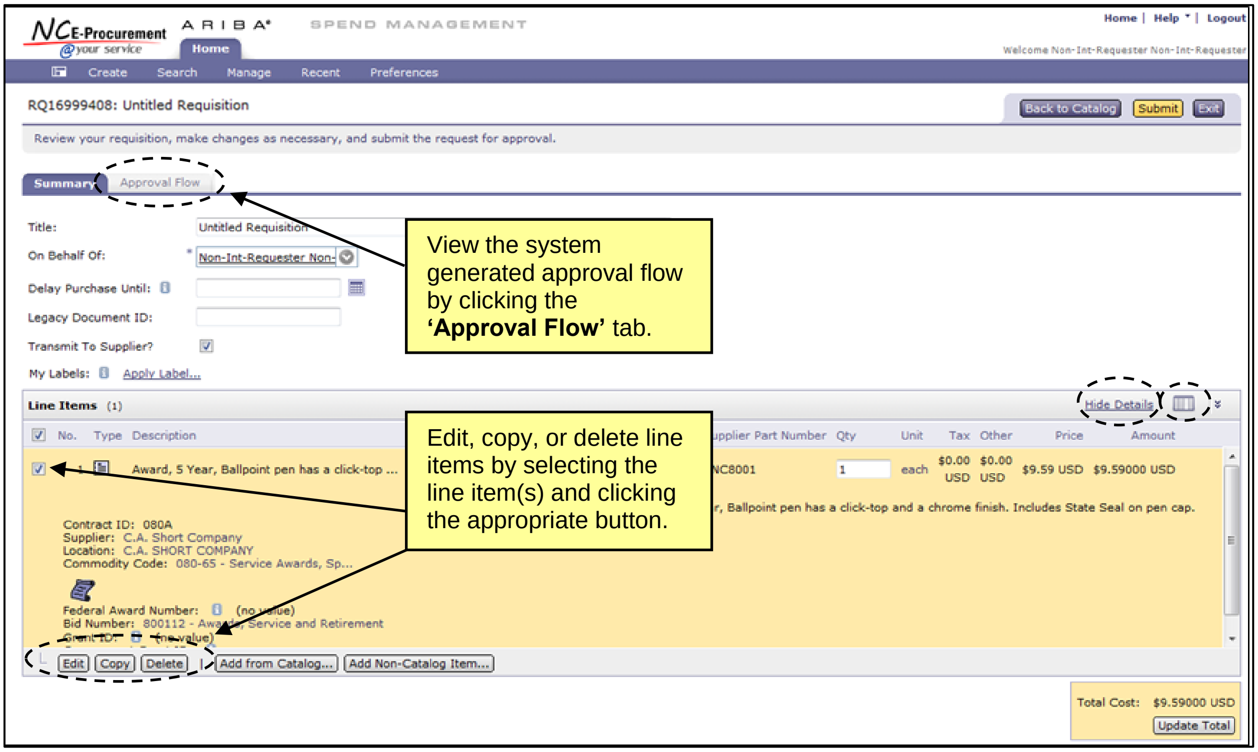
2. The **'Delay Purchase Until'** field lets the user decide whether to send the purchase order immediately or at a later date.

3. The **'Legacy Document ID'** field is the identification number that the user will need to enter for the particular order. The number will be associated with the order throughout its existence. This field is required and will need to be populated with a unique value.

4. While on the **'Summary'** page, the user may review the eRequisition line items prior to submitting the eRequisition. The user can edit, copy, and/or delete existing line items directly from this page by checking the box next to the line item and clicking the appropriate button. See the 'Editing Line Items' process guide for additional information regarding those processes.

5. Click on the **'Approval Flow'** tab to view the system generated approval flow for the eRequisition.

Note: The user can click the **'Hide Details'** link to minimize the amount of information that is shown for each line item. The small button next to the **'Hide Details'** link can be used to select exactly what information is displayed for each line item.



6. The **'Shipping – Entire eRequisition'** section should be populated according to where and to whom the items on the eRequisition should be shipped.

Note: Shipping values entered on the individual line items will override the Ship To information at the header level of the eRequisition. Shipping preferences for individual lines can be set by editing each line.

7. The '**Ship To'** field automatically defaults to the Ship To location in the user's profile.

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

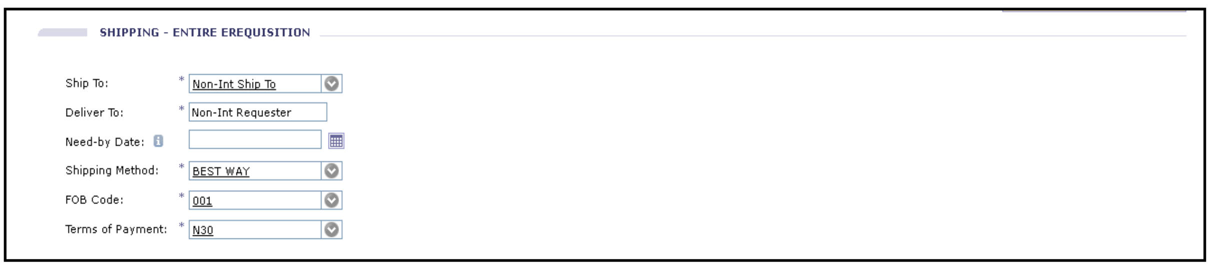
9. The **'Need-by Date'** field is transmitted on the purchase order to the supplier as the date by which the items need to be delivered. The calendar icon next to the field can be used to select the appropriate date.

10. The **'Shipping Method'** field defaults to 'Best Way.'

11. The **'Freight on Board (FOB) Code'** reflects how freight charges for the order are paid. Select the option meeting the user's agency purchasing policies.

12. The **'Terms of Payment'** field determines the timelines and conditions of payment to the vendor.

Note: For the **'Ship To,' 'Shipping Method,' 'FOB Code,'** and **'Terms of Payment'** fields, if the desired value is not defaulted in the field, the user should use the corresponding drop-down menu and select the desired value. If the value does not appear in the drop-down menu, click **'Search for more…'** A pop-up window will appear and all available values for that field will be displayed. The desired value can be selected from this pop-up window.



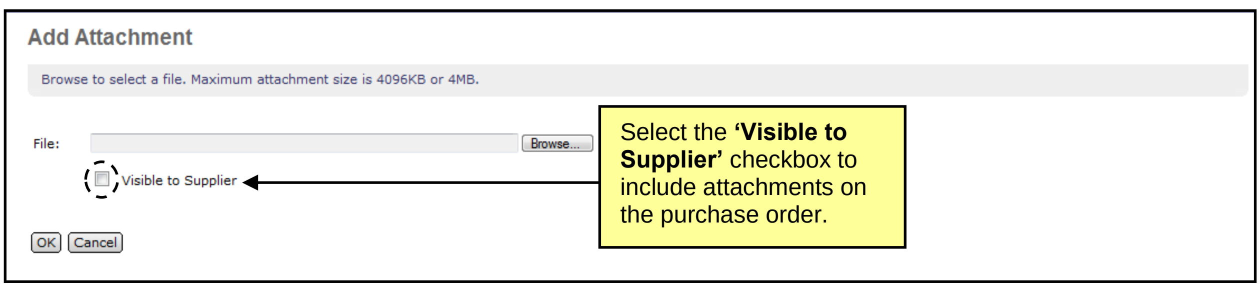
13. Comments can be added for the entire eRequisition using the **'Comments – Entire eRequisition'** field. The requester can add only one comment at the header level of the eRequisition. If more comments are needed, they can be added either at the line item level or at the header level by approvers of the eRequisition. For comments to be visible to the supplier, confirm that the **'Visible to Supplier'** box is checked.

14. Attachments can be added to the eRequisition at the header level by clicking **'Add Attachment.'**

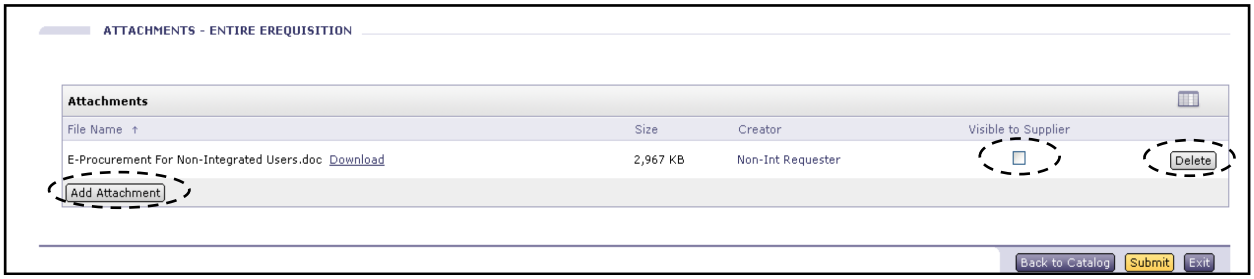
15. The **'Add Attachment'** page is displayed when **'Add Attachment'** is clicked at the header level on the **'Summary'** page. Click the **'Browse'** button to locate and select an attachment, then click **'OK'** once the attachment is selected to populate the **'File'** field.

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



16. Once the attachment has been added, the user can add more attachments by clicking **'Add Attachment,'** change the attachment's visibility to the supplier by checking or unchecking the **'Visible to Supplier'** checkbox, and delete attachments by clicking the corresponding **'Delete'** button.

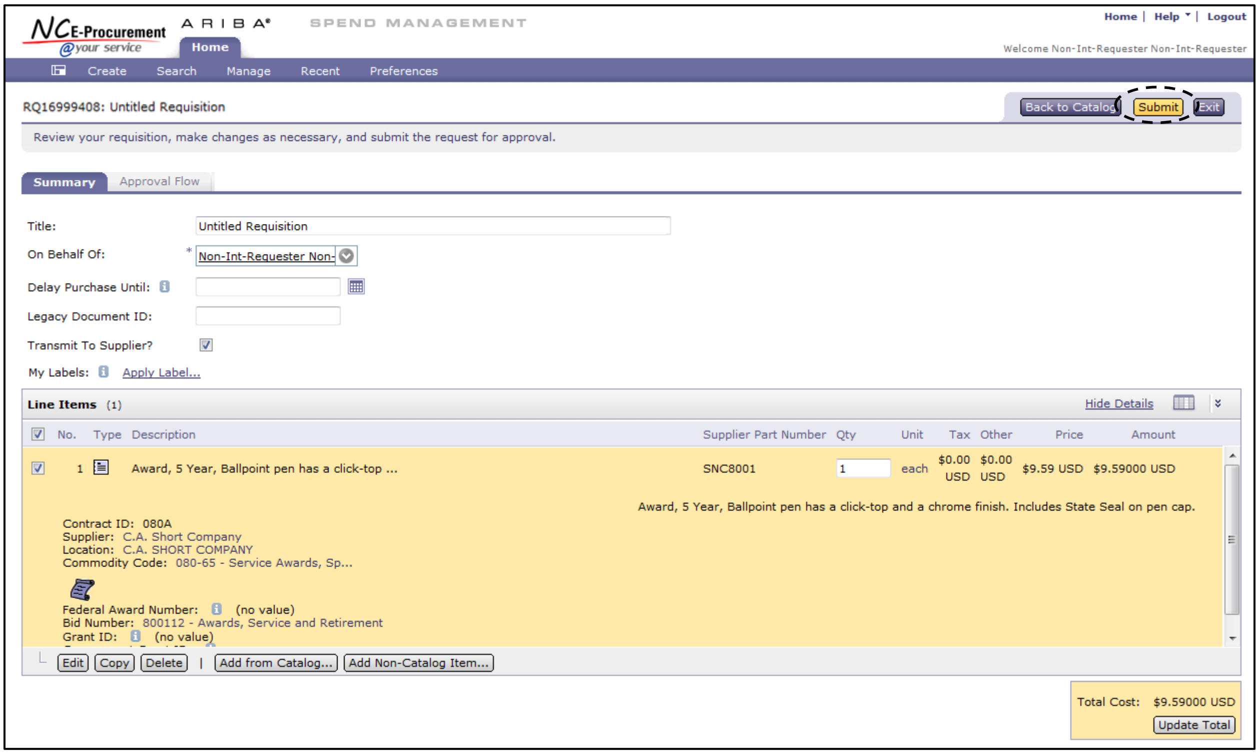


17. From the **'Summary'** page, the system generated approval flow can be reviewed by clicking the **'Approval Flow'** tab.

18. The user can submit the eRequisition from the **'Approval Flow'** tab by clicking **'Submit.'**

Note: For more information regarding approval flows, see the **'Approval Flows'** process guide.

19. The user can also submit the eRequisition to be reviewed and approved by clicking **'Submit'** on the **'Summary'** tab. Once the eRequisition has processed through the approval flow and is fully approved, the eRequisition will turn into a purchase order and will be sent to the selected supplier based on their preferred method of order delivery.



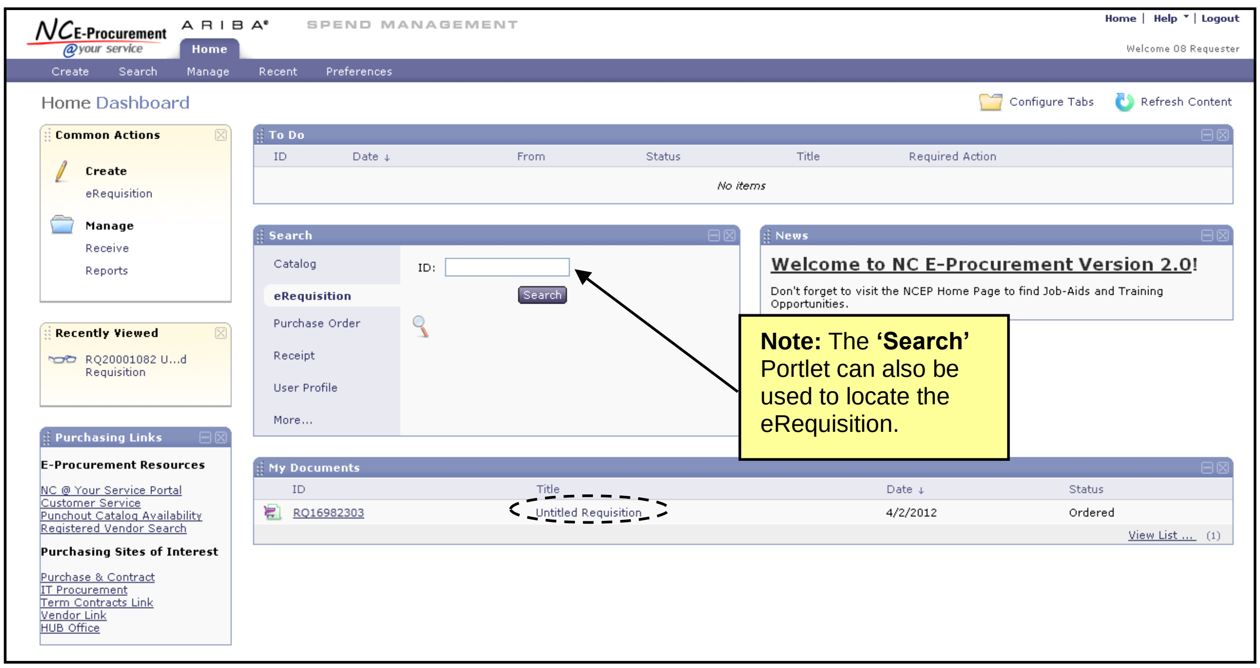
IV. Changing/Canceling an Existing Purchase Order

When a change needs to be made to a purchase order that has already been sent to the supplier, a change order can be created within NC E-Procurement. Once a change order is created, NC E-Procurement will append a version number to the end of the eRequisition and purchase order number (e.g., –V2, –V3, etc) if the requested change is significant enough to generate a new version of the purchase order.

Change orders submitted by the requester must go back through the eRequisition approval flow. Users should check their entity's policies prior to making changes to an eRequisition.

1. Find the eRequisition associated with the purchase order that needs to be changed. This can be done by accessing the eRequisition from the **'My Documents'** Portlet or by searching using the **'Search'** Portlet.

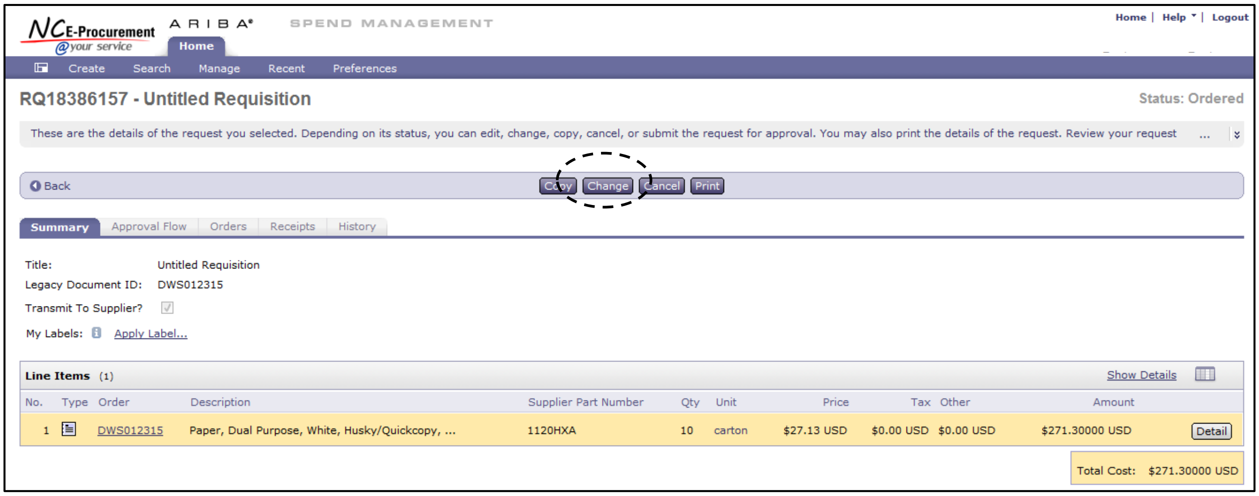
2. Click on the eRequisition **'ID'** or the **'Title'** of the eRequisition to display the eRequisition Summary.



3. Click the **'Change'** button to change the eRequisition.

Note: If the item being changed is an expired catalog item, the only updates that can be performed are to reduce the quantity or update it to zero.

Note: In order to cancel the order completely, click the **'Cancel'** button. If the original order was transmitted to the supplier, a cancellation notice will be sent to the supplier. If the original order was not sent to the supplier, the cancellation also will not be sent.



4. Make the necessary changes and click the **'Submit'** button.