

NC eProcurement

Collaborative Requisitioning

STATE DEPARTMENT STATE BRANCH
LOCAL GOVERNMENT CITY COUNTY
COMMUNITY COLLEGE PUBLIC SCHOOLS
NORTH CAROLINA ePROCUREMENT PURCHASING
ONLINE SHOPPING STATEWIDE TERM CONTRACTS
ELECTRONIC VENDOR PORTAL HUB CERTIFIED VENDOR
QUOTE PUNCHOUT CATALOG
PURCHASE ORDER
SOURCING
BIDDING
BUY

Collaborative Requisitioning is the informal quoting and pricing request function within the NC eProcurement system. When purchasing quantities of items over the typical purchasing threshold for normal buying policies, but under the threshold for a formal bidding process, users can use Collaborative Requisitions to obtain quotes for goods and services from multiple vendors at the same time.

Collaborations are started on individual line items on a Purchase Requisition (PR), meaning that on a PR containing multiple line items, you can have both collaborative and non-collaborative items as required. In addition, Collaboration can only be enabled while in Expert View.

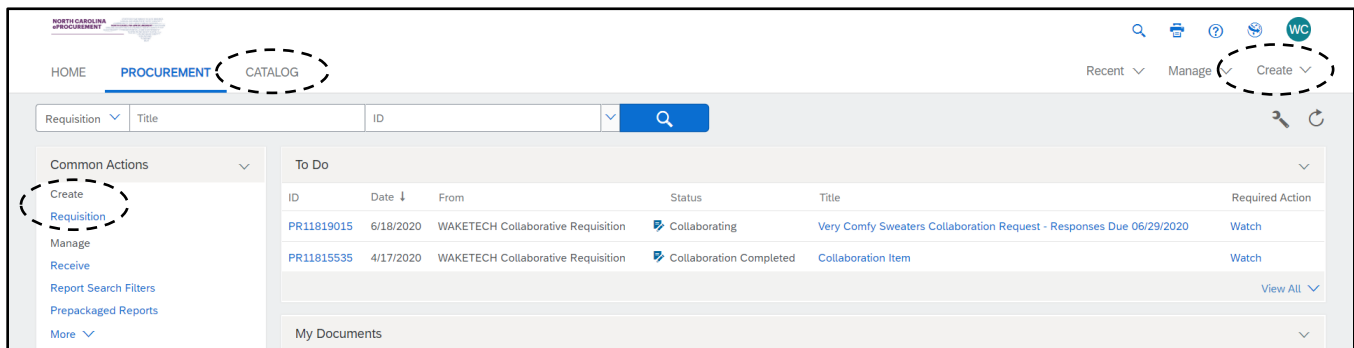
Note: The monetary thresholds for informal and formal bidding processes are dictated by your purchasing department. Consult your purchasing director if there are questions about when to use either process.

I. Entering Item Details

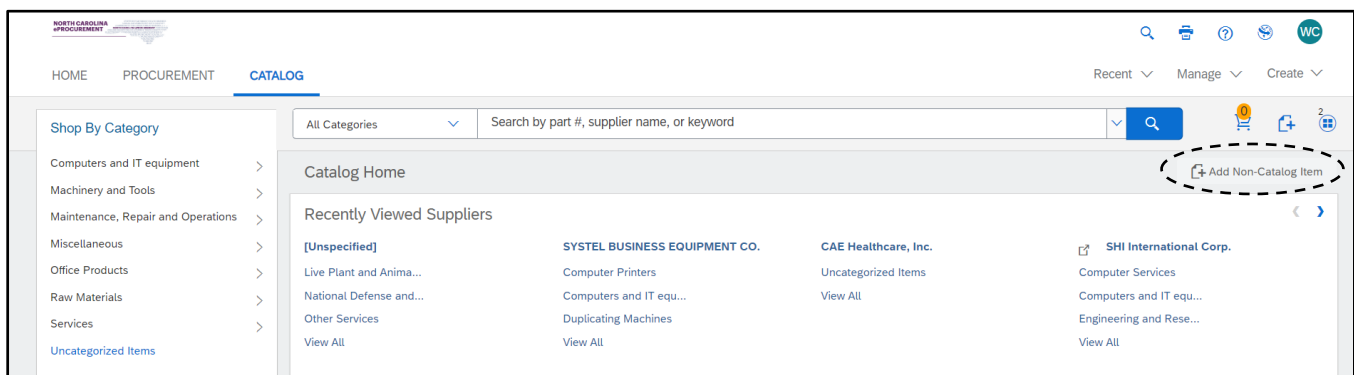
Before starting collaboration with vendors, users will need to create a non-catalog item. To begin the process, users will need both the ability to create Purchase Requisitions (PRs) as well as the correct permissions to Enable Collaboration with vendors.

Note: Approvers with the **Edit** capability that would like to enable Collaboration on an already submitted PR, please move to Section 3: Enabling Collaboration as an Approver.

1. In Expert View, navigate to the Catalog by either selecting the tab on the top of the screen, or by using the **'Create'** drop-down menu and selecting **'Requisition.'**



2. In the upper right of the Catalog, select **'Add Non-Catalog Item.'**



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3. Fill in all required line item details.

- When creating a Collaborative line item, users should leave the **'Price'** field at \$0.
- Leave the Supplier field blank. Suppliers will be selected after enabling Collaboration.
- Make sure that the 'Description' has all details that a vendor will need in order to give you an accurate quote for the goods or services being requested.

Note: For more information on line item creation, please reference the Expert View Purchase Requisitions guide.

Create Non-Catalog Item

Full Description: * Sample Collaboration Items

Commodity Code: * 501820 - Cakes and pies and pastries

Quantity: 200

Unit of Measure: each

Price: * \$0.00000 USD

Amount: \$0.00000 USD

Tax Amount: Update Amount

Terms of Payment: (no value)

Contract Type: No Choice

Blanket Purchase Order? Yes No

Other Costs: USD

Line Total of Tax and Other Costs:

FOB Code: * (EPLite) Destination

Recycled Content Indicator: Yes No

Collaborate With Suppliers

Collaborative requisitioning allows you to work with multiple suppliers to get the best possible price

Enable Collaboration

Supplier Information

Supplier: (No Preference)

Location: (no value) [select]

Supplier Part Number:

Supplier Auxiliary Part ID:

II. Beginning Collaboration as the Requester

Enabling Collaboration can **only** be done in Expert View. Enablement can be started on a new Purchase Requisition (PR), or on a Submitted PR that falls under the purchasing policy requirements to solicit quotes from vendors.

- On a newly created Non-Catalog Item, click the blue **'Enable Collaboration'** button on the right side of the screen to start the Collaboration process.

Create Non-Catalog Item

Full Description: * Sample Collaboration Items

Commodity Code: * 501820 - Cakes and pies and pastries

Quantity: 200

Unit of Measure: each

Price: * \$0.00000 USD

Amount: \$0.00000 USD

Tax Amount: Update Amount

Terms of Payment: (no value)

Contract Type: No Choice

Blanket Purchase Order? Yes No

Other Costs: USD

Line Total of Tax and Other Costs:

FOB Code: * (EPLite) Destination

Recycled Content Indicator: Yes No

Collaborate With Suppliers

Collaborative requisitioning allows you to work with multiple suppliers to get the best possible price

Enable Collaboration

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2. Once selected, the button will change to read **'Disable Collaboration,'** letting you know the Collaboration process has begun.
 - a. Next to the **'Price'** field, a drop-down menu will appear. Leave this option on the default value **'Negotiable.'**
 - b. Another new field, **'Hide Item Price from Suppliers,'** is located below Price. Check the box on this field to mask the item's unit price from vendors while they are participating in Collaboration.

The screenshot shows the 'Create Non-Catalog Item' form. Key elements include:

- Full Description:** Sample Collaboration Items
- Commodity Code:** 501820 - Cakes and pies and pastries
- Quantity:** 200
- Unit of Measure:** each
- Price:** \$0.00000 USD
- Price Dropdown:** Negotiable (highlighted with a dashed circle)
- Hide Item Price from Suppliers:** ☒ (highlighted with a dashed circle)
- Amount:** \$0.00000 USD
- Update Amount** button
- Supplier Information** section at the bottom
- Disable Collaboration** button (highlighted with a dashed circle)

3. To invite Suppliers to Collaborate, click the revealed **'Change'** button in the Supplier Information section.
4. On the next page, click **'Add New Supplier...'** to open the list of currently active NC eProcurement vendors in the system.
 - a. To search, type the full or partial company name for a vendor listed in the electronic Vendor Portal (eVP). Any misspellings in the search will bring back incorrect or no results at all.
 - i. To search for vendors using more company registration information, please see Section IV: Using eVP to Find Vendors. Some information, such as vendors with HUB status information, can also be found in the Supplier Search before enabling Collaboration.
 - b. Choose a vendor to request Collaboration with by clicking the **'Select'** button to the right, or click **'Done'** to close the pop-up.
 - c. Add suppliers using the **'Add New Supplier...'** button until purchasing requirements are met and click **'OK'** to go back to the line item page.

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Choose Values for Invited Suppliers

Currently Selected

Supplier Name	Contact
BOB BARKER COMPANY INC	BOB BARKER COMPANY INC [select]
Jarvis Property Restoration	Jarvis Property Restoration [select]
US Foods	US Foods Columbia Division [select]

Remove Add New Supplier...

OK Cancel

- Confirm that the selected suppliers now appear under the Supplier Information section.
- Under the Supplier Information section, set the **'Bidding Type'** drop-down to **'Open – Amount'** to enable vendors to see the winning quote once Collaboration is completed.

Note: Do not create a **'New'** bidding type as that may cause system issues.

- When the line is ready to be submitted, click **'Add to Cart.'**

Supplier Information

Invited Suppliers

BOB BARKER COMPANY INC	BOB BARKER COMPANY INC
Jarvis Property Restoration	Jarvis Property Restoration
US Foods	US Foods Columbia Division

Change

Bidding Type: None

Supplier Part Number: None

Supplier Auxiliary Part ID: Closed

Open - Amount

Open - Amount, Rank

Open - Amount, Rank, Supplier

New...

Add to Cart Cancel

- Click **'Proceed to Checkout'** to go to the PR Summary page.

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9. When titling the PR, make sure to put a Response Due Date in the title, e.g. “Sample Items – **Responses Due By 07/01/2020**” to inform the vendor when quotes are due for submission. There is no Due Date field in Collaborative Requisitioning.

PR11819073:

Summary

Title: * Sample Items - Responses Due by 07/01/2020

Entity: WAKETECH - Wake Technical Community College

On Behalf Of: WAKETECH Collaborative Requisition

Suppress Order: ☐ ⓘ

FOB Code: * (EPLite) Destination

Cart Summary

[Unspecified] (1)	\$0.00000 USD
Total (1 item)	\$0.00000 USD

Check

10. Comments and attachments can be added on the Summary tab. Designs, additional details, or specific terms and conditions can be linked in the comments or attached. For example, IT purchases may require additional language or information - [NCDIT IT Procurement Forms & Templates](#)
 - a. Selecting the ‘**Visible to supplier**’ option will send comments and attachments to vendors after the PR is fully approved, **after Collaboration is completed**.
 - b. To make comments and attachments available to vendors **during Collaboration**, check the ‘**Visible to supplier during collaboration**’ box.

PR11819073:

Summary

Title: * Sample Items - Responses Due by 07/01/2020

Entity: WAKETECH - Wake Technical Community College

On Behalf Of: WAKETECH Collaborative Requisition

Suppress Order: ☐ ⓘ

FOB Code: * (EPLite) Destination

GRAND TOTAL AMOUNT INCLUDING TAX AND OTHER COSTS:

My Labels: Apply Label... ⓘ

Ship To: * Wake Technical Community College Rec...

Deliver To: * WAKETECH Collaborative R

Comments: Place any specific comments for vendors to see during Collaboration here and check the box below.

☐ Visible to Supplier

☒ Visible to suppliers during collaboration

Attachments: Add Attachment

Cart Summary

[Unspecified] (1)	\$0.00000 USD
Total (1 item)	\$0.00000 USD

Check

11. Navigate down to the line item on the Summary page, check the box next to the line item going into Collaboration, and use the ‘**Actions**’ drop-down to Edit the line and add accounting information, then click ‘**Ok**’ to go back to the PR Summary screen.

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- Once all required fields are filled out, press **'Submit.'** Depending on the approval flow for your entity, the order will either move into Submitted or Collaborating status.

Note: Orders that do not move into Collaborating status after clicking 'Submit' may need additional approval before being sent out for Collaboration. Check the Approval Flow to see how many approvals are required before the PR reaches Collaboration status.

III. Enabling Collaboration as an Approver

As an Approver, enabling Collaboration can only be done in Expert View. Approvers will need both the ability to edit submitted Purchase Requisitions (PRs) as well as begin Collaboration on a submitted line item. Not all users will have both or either capabilities.

For further information on approving and editing line items, please see 'Approving a Requisition.'

- In Expert View, select the PR either the **'ID,' 'Title,'** or **'Approve'** link, then click the **'Edit'** button.
- Scroll down to the line items on the Summary page, check the box next to the line that needs Collaboration with vendors, and use the **'Actions'** drop-down to select **'Edit Details.'**

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3. In the upper right of the line item details page, select the **'Yes'** radio button next to the **'Collaborate with supplier(s) for this item'** field.

PR11819083: Sample Items Collaboration Request - Responses Due...

Line Item Details

No.: 1

Full Description: Sample Collaboration Items

Supplier Part Number:

Supplier Auxiliary Part ID:

Qty: 200

UOM: each

Price: \$25.00000 USD

Collaborate with supplier(s) for this item: ☐ Yes ☒ No

Additional Pricing Details ⓘ

4. Once selected, several fields will be added to the line item details, and the Invited Suppliers section will appear on the right.
 - a. Set the **'Price'** field to \$0.
 - b. Next to the **'Price'** field, a drop-down menu will appear. Leave this option on the default value **'Negotiable.'**
 - c. Another new field, **'Hide Item Price from Suppliers,'** is located below Price. Check the box on this field to mask the item's unit price from vendors while they are participating in Collaboration.
5. To invite Suppliers to Collaborate, click the revealed **'Change'** button in the Supplier Information section.

PR11819083: Sample Items Collaboration Request - Responses Due...

Line Item Details

No.: 1

Full Description: Sample Collaboration Items

Supplier Part Number:

Supplier Auxiliary Part ID:

Qty: 200

UOM: each

Price: \$0.00000 USD Negotiable

Hide Item Price from Suppliers: ☒

Invited Suppliers

No Items

Collaborate with supplier(s) for this item: ☒ Yes ☐ No

Change

Additional Pricing Details ⓘ

6. On the next page, click **'Add New Supplier...'** to open the list of currently active NC eProcurement vendors in the system.
 - a. To search, type the full or partial company name for a vendor listed in the electronic Vendor Portal (eVP). Any misspellings in the search will bring back incorrect or no results at all.
 - i. To search for vendors using more company registration information, please see Section IV: Using eVP to Find Vendors. Some information, such as vendors with HUB status information, can also be found in the Supplier Search before enabling Collaboration.
 - b. Choose a vendor to request Collaboration with by clicking the **'Select'** button to the right or click **'Done'** to close the pop-up.

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- c. Add suppliers using the **'Add New Supplier...'** button until purchasing requirements are met and click **'OK'** to go back to the line item page.

7. Confirm that the selected suppliers now appear under the Supplier Information section.
8. Under the Supplier Information section, set the **'Bidding Type'** drop-down to 'Open – Amount' to enable vendors to see the winning quote once Collaboration is completed.
9. When finished with editing the line item details, click **'OK'** to return to the PR Summary page.

10. When titling the PR, make sure to put a Response Due Date in the title, e.g. "Sample Items – **Responses Due By 07/01/2020**" to inform the vendor when quotes are due for submission. There is no Due Date field in Collaborative Requisitioning.

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11. Comments and attachments can be added on the Summary tab. Designs, additional details, or specific terms and conditions can be linked in the comments or attached. For example, IT purchases may require additional language or information - [NCDIT IT Procurement Forms & Templates](#)
 - a. Selecting the **'Visible to supplier'** option will send comments and attachments to vendors after the PR is fully approved, **after Collaboration is completed**.
 - b. To make comments and attachments available to vendors **during Collaboration**, check the **'Visible to supplier during collaboration'** box.

GRAND TOTAL AMOUNT INCLUDING TAX AND OTHER COSTS:

My Labels: [Apply Label...](#) ⓘ

Ship To: * [Wake Technical Community College Rec...](#)

Deliver To: * [WAKETECH Collaborative R](#)

Comments: [Place any specific comments for vendors to see during Collaboration here and check the box below.](#)

☐ Visible to Supplier

☒ Visible to suppliers during collaboration

Attachments: [Add Attachment](#)

Users must select the 'Visible to suppliers during collaboration' option to make comments and attachments available to vendors during actual Collaboration.

12. Once all required fields are updated to include the new Collaboration details, press **'Save.'** Depending on the approval flow for your entity, the order will either move into Submitted or Collaborating status.

PR11819083: Sample Items Collaboration Request - Responses Due...

Print Continue Shopping **Save** Exit

Summary

Title: * [Sample Items - Responses Due 07/01/2020](#)

Entity: [19 - Department of Public Safety](#)

On Behalf Of: [DPS: Requester](#)

Delay Purchase Until: ⓘ

Suppress Order: ⓘ

ERP Reference ID: PR11819083

Buying Entity: [19EG](#)

FOB Code: [\(NCAS\) 001 - Destination freight paid by vendor and included in price. Title passes upon receipt. Vendor files any claims.](#)

My Labels: [Apply Label...](#) ⓘ

Ship To: * [NJQ](#)

Deliver To: * [DPS: Requester](#)

Need-by Date: ⓘ

Comments: [Sample comment for all vendors invited to Collaboration request to see.](#)

☐ Visible to Supplier

☒ Visible to suppliers during collaboration

Cart Summary

[Unspecified] (1)	\$0.00000 USD
Total (1 item)	\$0.00000 USD

[Check](#)

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13. To view the updated PR, use the 'Recently Viewed' portlet on the Procurement tab.

PR11819083 - Sample Items - Responses Due 07/01/2020

Status: Collaborating

Copy End Collaboration Print

Summary Collaboration Orders Receipts History

Title: Sample Items - Responses Due 07/01/2020
Entity: 19 - Department of Public Safety
On Behalf Of: DPS Requester
Suppress Order: ☐
ERP Reference ID: PR11819083
Processing Agent: Not applicable
Buying Entity: 19EG
FOB Code: (NCAS) 001 - Destination freight paid by vendor and included in price. Title passes upon receipt. Vendor files any claims.
My Labels: Apply Label...
Ship To: NUD
Deliver To: DPS Requester
Need-By Date:

Cart Summary

[Unspecified] (1)	\$0.00000 USD
Total (1 Item)	\$0.00000 USD

Note: Orders that do not move into Collaborating status after clicking **'Submit'** may need additional approvals before being sent out for Collaboration. Check the Approval Flow to see how many approvals are required before the PR reaches the Collaboration step.

IV. Using eVP to Find Vendors

Before creating a Collaborative Requisition, users may need to find active eProcurement vendors that provide the goods and/or services being requested. The electronic Vendor Portal (eVP) Public Vendor Search is a convenient way to find and filter active vendors in the system capable of receiving Collaboration requests.

A video walkthrough on Searching for Registered Vendors is also available on the eProcurement website: [Searching for Registered Vendors](#).

1. Navigate to the [Public Vendor Search](#). Users can also use the 'Public Vendor Search' tile link on the [eProcurement website](#).
2. If the vendor's name is known, populate the vendor name in the Search field.
3. Click the **'Filter'** button and select **'Active'** in the **'Registration Status'** drop-down within the **'NC E-Procurement'** section (not the **'IPS'** section below it or the general **'Vendor Status'** drop-down above it) to return only vendors who are currently active and able to accept purchase orders.

Vendor Name: *glass*

Vendor Status: Select

Customer Number:

NC E-Procurement

Registration Date Range

From: To:

Registration Status: Active

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4. Click the magnifying glass to initiate the search.
5. Click **“View”** in the **“Summary”** column of the desired Vendor to see more information.

Note: When selecting vendors for Collaboration, use the **exact** Vendor Name listed in the Public Vendor Search.

Vendor Search

81 results

Filter Example Vendor

Show 10 entries Export

Summary	Vendor Name	Main Contact Name	Main Contact Email	Main Contact Phone	NC E-Procurement
View	Example Vendor	Company Owner	owner@vendor.com	+1 (919) 555-1234	✓

6. Vendors who have indicated they provide certain types of goods or services can be searched for based on related commodity codes.
 - a. Scroll down the screen below the drop-down and free-text filters to the **‘Commodity Codes:’** section. By expanding the arrows next to each heading, you can select areas in which Vendors have indicated they provide specific goods or services

Commodity Codes:

Apparel and Luggage and Personal Care Products

- ☒ Clothing - 5310
- ☒ Footwear - 5311
- ☐ Luggage and handbags and packs and cases - 5312
- ☐ Personal care products - 5313
- ☐ Sewing supplies and accessories - 5314

Clicking on the arrow next to each Commodity Code Section Header will expand that field to display the specific areas in which Vendors have indicated they provide goods or services.

Building and Construction Machinery and Accessories

7. Once all relevant commodity codes have been selected, a search can be executed by selecting the **‘Apply’** button at the top of the page.

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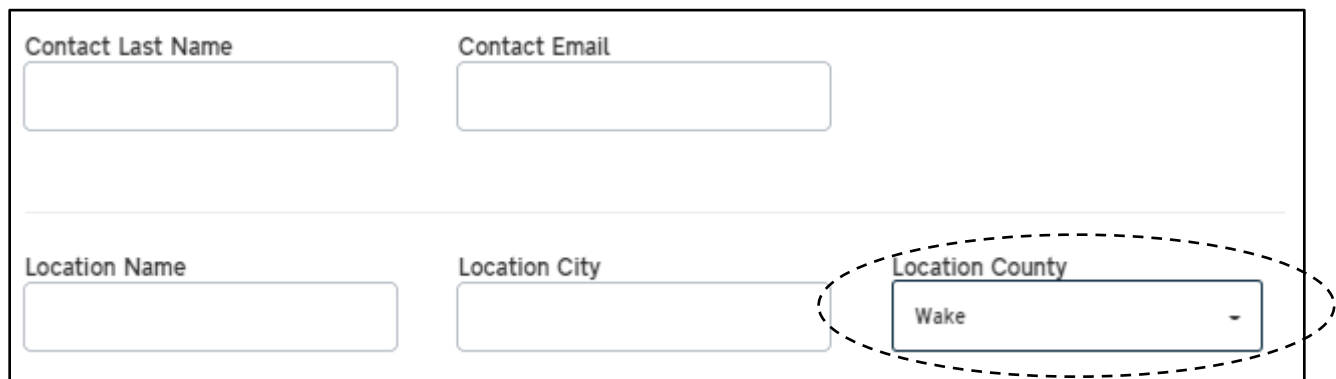
8. Additional search filters can be used to search by specific criteria in order to find more focused results.
- a. Select '**Certified**' in the '**Certification Status (HUB)**' drop-down beneath the '**IPS**' section will filter results to include only vendors who are currently Certified as a Historically Underutilized Business (HUB).



The screenshot shows a rectangular box with the title "Certification Status (HUB)". Inside the box is a drop-down menu with a blue border. The menu is currently displaying the word "Certified" and a small downward-pointing arrow on the right side.

- b. Further down the page, there are five filters that can help target specific vendors by contact or geographical location.
 - i. If vendor contact information is known, the '**Contact Last Name**' or '**Contact Email**' can be entered to return the associated vendor account.
 - ii. Selecting a specific County from the '**Location County**' drop-down will return only vendors who have entered an address located in that county. The '**Location City**' filter is a free-text field into which even more specific localized information can be entered.

Note: Filtering by County only works for North Carolina based vendors.



The screenshot displays a search filter section with four input fields arranged in a 2x2 grid. The top row contains "Contact Last Name" and "Contact Email". The bottom row contains "Location Name" and "Location City". To the right of "Location City" is a "Location County" drop-down menu. This drop-down menu is highlighted with a dashed oval and shows "Wake" as the selected option. A horizontal line separates the top row of fields from the bottom row.

9. Use a combination of fields to find vendors to begin Collaboration with.
- a. Using fewer fields may result in more vendors, but less accurate results.
 - b. Users should contact vendors to confirm that they offer the requested goods/services before sending a Collaboration request.

Note: All vendors registered to receive purchase orders can be selected for Collaboration requests, but in order to respond to the request they will need to register for an Ariba Network supplier account. Vendors with questions on the Ariba Network account creation process should contact the vendor Help Desk.

V. Handling Substitute Items

Vendors may not provide, or have available in their inventory, the goods/services being requested. In this event, vendors may offer the requester an equivalent substitute instead.

1. If a vendor would like to offer a substitute item, they may edit the line item details, part number, and quantity in addition to offering a price without informing the buyer beforehand.
 - a. When reviewing Collaboration responses, covered in Section VII: Finishing Collaboration, be sure that all details match up to the original Collaboration request.
 - b. All changes to the line(s), including adding or removing details, can be found on the Changes tab on the vendor proposal page.

Proposal PR11819073-P339 - Sample Items - Responses Due by 07/01/2020 Status: Submitted

These are the details of the request you selected. Depending on its status, you can edit, change, copy, cancel, or submit the request for approval. You may also print the details of the request. Review your request and take the desired action(s).

[Accept Proposal](#)
[Reject Proposal](#)
[Actions ▾](#)

[Summary](#)
[Changes](#)
[History](#)
[Previous Documents](#)

Changes from PR11819073-R883: Sample Items - Responses Due by 07/01/2020

Field ↑	Action
▼ Line Item 1	
▼ Description	
Price	changed from \$0.00000 USD to \$29.00000 USD
Supplier Part Number	changed from (no value) to 12345

2. Vendors may also submit a substitute item as a completely new line item instead of proposing a price for the initial Collaboration request, appearing on the Collaboration tab as a new line.

[Summary](#)
[Collaboration](#)
[Orders](#)
[Receipts](#)
[History](#)

View by: ☒ Supplier ☐ Line Item

Proposals Hide Details ▢ | ↕

Name ↓	Contact	Status	Qty	UOM	Price	Total
▼ Jarvis Property Restoration ▾	Jarvis Property Restoration	Proposal Received - Please Respond				\$6,000.00000 USD
1. Sample Collaboration Items			200	each	\$0.000000 USD	\$0.000000 USD
▶ Line Item Details ▶ Item Bidding Info						
2. Substitute Item			200	each	\$30.000000 USD	\$6,000.00000 USD
▼ US Foods ▾	US Foods Columbia Division	Request Sent - Waiting For Response				\$0.000000 USD
1. Sample Collaboration Items			200	each	\$0.000000 USD	\$0.000000 USD
▶ Line Item Details ▶ Item Bidding Info						

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- To accept the proposed substitute, choose to **'Accept Proposal'** when finishing Collaboration with the vendor, and use the Acceptance drop-down menu to Accept the line(s) and finish Collaborating. See Section VII: Finishing Collaboration for more information on ending the Collaboration process.

Accept Proposal from *Jarvis Property Restoration* OK Finish Collaborating Cancel

Confirm that you would like to accept this proposal.

Proposal **PR11819073-P337** - Sample Items - Responses Due by 07/01/2020

Items Being Accepted (partial acceptance is allowed)

Acceptance	No.	Type	Description	Qty	Unit	Price	Amount
Not Accepted	1		Sample Collaboration Items	200	each	\$0.00000 USD	\$0.00000 USD
Accepted	2		Substitute Item	200	each	\$30.00000 USD	\$6,000.00000 USD

OK Finish Collaborating Cancel

Buyers should check their purchasing policy guidelines or contact their purchasing leadership for guidance on whether to accept the substitute item(s).

VI. Communicating with Vendors During Collaboration

Users can communicate with vendors both via the **'Send Message'** Collaboration tool and **'Comments'** section on the Purchase Requisition (PR) Summary page during Collaboration.

Users can also contact the vendor directly using information found in the electronic Vendor Portal or given by the vendor themselves during Collaboration.

- For comments that should be seen by all vendors selected for Collaboration, users can use the Comments section on the PR Summary page.
 - Either before or during active Collaboration, navigate to the Summary page.
 - To add a new comment to the PR, click the **'Add Comment'** button or link.
 - After writing any pertinent information for the supplier, check the **'Visible to suppliers during collaboration'** box and click **'OK'**
 - Vendors will see any designated comments on the same screen as the line item details in their Ariba Network account.

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2. Users may also want to exchange messages with individual vendors using the 'Send Message' tool once Collaboration has begun.
 - d. Select the '**ID**,' '**Title**,' or '**Required Action**' of a PR currently in 'Collaborating' status in the To Do portlet to be brought to the Collaborating tab.
3. Click the '**Request Sent**' link for the chosen vendor under the Status column.

Name	Contact	Status	Qty	UOM	Price	Total
Jarvis Property Restoration	Jarvis Property Restoration	Request Sent - Waiting For Response	200	each	\$0.00000 USD	\$0.00000 USD

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- Use the **'Actions'** drop-down in the upper right and select **'Send Message,'** or use the **'New Message'** button on the lower right.

Collaboration Request PR11819073-R881 - Sample Items - Responses Due by 07/01/2020
Status: Submitted

These are the details of the request you selected. Depending on its status, you can edit, change, copy, cancel, or submit the request for approval. You may also print the details of the request. Review your request and take the desired action(s).

Summary

Supplier: Jarvis Property Restoration
My Labels: [Apply Label...](#) [?](#)

Line Items

1 Line Item

No.	Type	Description	Qty	Unit	Price	Amount	
1		Sample Collaboration Items	200	each	\$0.00000 USD	\$0.00000 USD	Detail

Supplier: Jarvis Property Restoration

Messages Referring To This Document
(All Messages)
[New Message](#)

No items

- Compose the message and add any reference attachments, then click **'Send.'**

Compose Message
[Send](#)
[Cancel](#)

Create a new message that will be posted on the message board.

Subject:

Visible to Supplier: ☒ Yes ☐ No

Message:

Attachments: [Add](#)

History

No items

[Send](#)
[Cancel](#)

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QUOTE PUNCHOUT CATALOG
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BIDDING
BUY

- Messages sent by both the buyer and vendor will appear in the **'Messages Referring To This Document'** section on the vendor's Collaboration details page.

Line Items

1 Line Item

No.

Type

Description

Qty

Unit

Price

Amount

1

Sample Collaboration Items

200

each

\$0.00000 USD

\$0.00000 USD

Detail

Supplier: Jarvis Property Restoration

Messages Referring To This Document

(All Messages)

New Message

Subject: Sample Item Question

From: Jarvis Test (6/19/2020 6:35 PM) ✓

Vendor response to the first question with more details.

Subject: Sample Item Question

From: WAKETECH Collaborative Requisition (6/19/2020 6:34 PM) ✓

Sample message to communicate with the individual vendor.

Attachments - Entire Collaboration Request

Add Attachment

VII. Finishing Collaboration

Users may end Collaboration at any time, either because the Collaboration is no longer needed or to accept a vendor's submitted pricing proposal. Users can perform either action from the Collaboration tab on the Purchase Requisition (PR) currently in Collaborating status.

- Select the **'ID,' 'Title,'** or **'Required Action'** of a PR currently in 'Collaborating' status in the To Do portlet to be brought to the Collaboration tab.
 - The Collaboration tab shows the overview and status of the Collaboration requests.
 - This tab shows all vendors added to the Collaboration request(s), if they have provided a quote, and the 'Price Per Unit' and 'Total' for all vendors that have responded.
 - Proposed pricing can be quickly compared on this page to determine the vendor to choose.

NC eProcurement Collaborative Requisitioning

STATE DEPARTMENT STATE BRANCH
LOCAL GOVERNMENT CITY COUNTY
COMMUNITY COLLEGE PUBLIC SCHOOL
NORTH CAROLINA ePROCUREMENT
ONLINE SHOPPING STATEWIDE TERM CONTRACT
ELECTRONIC VENDOR PORTAL HUB CERTIFIED V
QUOTE PUNCHOUT CATALOG
PURCHASE ORDER
SOURCING
BIDDING
BUY

PR11819073 - Sample Items - Responses Due by 07/01/2020 Status: Collaborating

End Collaboration Copy Print

Summary **Collaboration** Orders Receipts History

View by: ☒ Supplier ☐ Line Item

Proposals Hide Details

Name	Contact	Status	Qty	UOM	Price	Total
BOB BARKER COMPANY INC 1. Sample Collaboration Items Line Item Details Collaborate: Yes Item Bidding Info Lowest Amount: \$0.00000 USD Price: \$0.00000 USD	BOB BARKER COMPANY INC	Proposal Received - Please Respond	200	each	\$28.00000 USD	\$5,600.00000 USD
US Foods 1. Sample Collaboration Items Line Item Details Collaborate: Yes Item Bidding Info Lowest Amount: \$0.00000 USD Price: \$0.00000 USD	US Foods Columbia Division	Request Sent - Waiting For Response	200	each	\$0.00000 USD	\$0.00000 USD

2. To end a Collaboration request before selecting a vendor, select the **'End Collaboration'** button in the upper left.
 - a. The next page shows the Acceptance Status of all collaboration line items on the PR, including any new lines for vendor suggested substitutions. See Section V: Handling Substitutions for more information on substitute items.
 - b. Clicking **'Submit'** will delete line items with no accepted vendor proposals. This will end any Collaboration for all line items on the PR.
 - c. Click the **'Continue Collaborating'** button to go back to the Collaboration tab and continue evaluating vendor responses.

HOME **PROCUREMENT** CATALOG Recent Manage Create

Requisition PR11819073: Sample Items - Responses Due by 07/01/2020 Submit Continue Collaborating

0 of 2 Items Completed Requisition PR11819073

This is the current acceptance status of the collaborative line items on the requisition. These line items will be updated, added, or deleted based on their acceptance status.

Collaborative Line Items

Description	Acceptance Status
Sample Collaboration Items	No Proposal has been accepted for this item.
Substitute Item	No Proposal has been accepted for this item. (This item was added to Proposal PR11819073-P337 during collaboration.)

☐ Don't ask me again (reset in preferences)

NC eProcurement Collaborative Requisitioning

3. When a vendor has responded to the Collaboration, the status will update to **'Proposal Received – Please Respond'** on the Collaboration tab. Click on the status link to go to the proposal details.
 - a. The Changes tab shows all changes to the Collaboration line item that the vendor made when sending in their request.
 - b. The History tab will show when the vendor sent their proposal to the buyer.
 - c. All Messages and Attachments exchanged with the chosen vendor can be found below the line item details for reference before finishing Collaboration.

Proposal PR11819073-P338 - Sample Items - Responses Due by 07/01/2020 Status: Submitted

These are the details of the request you selected. Depending on its status, you can edit, change, copy, cancel, or submit the request for approval. You may also print the details of the request. Review your request and take the desired action(s).

Accept Proposal Reject Proposal Actions

Summary **Changes** History Previous Documents

Supplier: BOB BARKER COMPANY INC
My Labels: Apply Label...

Line Items

1 Line Item

No.	Type	Description	Qty	Unit	Price	Amount
1		Sample Collaboration Items	200	each	\$28.00000 USD	\$5,600.00000 USD

Messages Referring To This Document (All Messages) New Message

4. Use the Changes tab to inspect the line item response details. Check to see if the Full Description, Quantity, Part Number, etc. have been altered by the vendor.
 - a. If any details have been altered without prior notice, contact the vendor to see why the changes were made and work with your purchasing department to see if the substituted item details can be accepted, if needed.

Changes from PR11819073-R883: Sample Items - Responses Due by 07/01/2020

Field	Action
Line Item 1	
Description	
Price	changed from \$0.00000 USD to \$29.00000 USD
Supplier Part Number	changed from (no value) to 12345

5. Click **'Accept Proposal'** at the top of the page of the best vendor proposal.

NC eProcurement Collaborative Requisitioning

6. Select the **'OK'** button to accept the vendor proposal for Collaboration for just the chosen line and continue Collaboration on other lines.
 - a. The **'Finish Collaborating'** button is for ending Collaboration immediately after accepting this vendor proposal.

Accept Proposal from *US Foods*

Confirm that you would like to accept this proposal.

Proposal **PR11819073-P339** - Sample Items - Responses Due by 07/01/2020

Items Being Accepted

No.	Type	Description	Qty	Unit	Price	Amount
1		Sample Collaboration Items	200	each	\$29.00000 USD	\$5,800.00000 USD

Buttons: OK, Finish Collaborating, Cancel

7. After accepting proposals for all line items as needed, select the **'End Collaboration'** button on the Collaboration tab.

Note: After accepting a vendor response for a Collaboration request, the status of other vendor responses will not be altered by the system until Collaboration ends.

PR11819073 - Sample Items - Responses Due by 07/01/2020

Status: Collaborating

Buttons: End Collaboration, Copy, Print

Summary | Collaboration | Orders | Receipts | History

View by: ☒ Supplier ☐ Line Item

Proposals

Name	Contact	Status	Qty	UOM	Price	Total
✓ BOB BARKER COMPANY INC	BOB BARKER COMPANY INC	Accepted	200	each	\$28.00000 USD	\$5,600.00000 USD
1. Sample Collaboration Items Line Item Details Collaborate: Yes Item Bidding Info Lowest Amount: \$0.00000 USD Price: \$0.00000 USD						
✓ US Foods	US Foods Columbia Division	Proposal Received - Please Respond	200	each	\$29.00000 USD	\$5,800.00000 USD
1. Sample Collaboration Items Line Item Details						

NC eProcurement Collaborative Requisitioning

8. Click **'Submit'** to end Collaboration for the line item(s) and merge the quoted price for the goods or services onto the PR.
 - a. Any lines without accepted vendor proposals, including substitutes, will be deleted from the PR.
 - b. Click the **'Continue Collaborating'** button to go back to the Collaboration tab and continue evaluating vendor responses.
9. Once the user clicks **'Submit'** to accept the vendor proposal(s), the PR Collaboration line items will be populated with the vendor chosen and the proposed pricing.

Requisition PR11819073: Sample Items - Responses Due by 07/01/2020

1 of 2 Items Completed

This is the current acceptance status of the collaborative line items on the requisition. These line items will be updated, added, or deleted based on their acceptance status.

Description	Acceptance Status
Substitute Item	No Proposal has been accepted for this item. (This item was added to Proposal PR11819073-P337 during collaboration.)
Sample Collaboration Items	Proposal PR11819073-P338 from BOB BARKER COMPANY INC has been accepted for this item.

☐ Don't ask me again (reset in preferences)

The 'Sample Collaboration Item' will be imported with the requested vendor price and information. The 'Substitute Item' will be deleted as the proposal was not accepted.

10. As Collaboration is finished, the status will move to 'Collaboration Completed' and the PR is sent to the Approval Flow. Check the Approval Flow on the PR Summary page for further information on the required approvals for the newly submitted PR.

Note: Depending on the Approving rules set up by the requester's entity, the PR may need to be approved by additional groups, sent to the vendor directly for order fulfillment, or be sent the user's financial system. For questions about the approval flow rules set up for your entity, please contact your Security Administrator.

Approval Flow

Submitted → Watcher (NC Collaboration Team, WAKETECH Collaborative Requisition) → Active (Toni Hales) → Pending (WAKETECH No Supervisor) → Pending (VP Financial & Business Services) → WAKETECH Se

Line Items

1 Item Total

No.	Type	Description	Qty	Unit	Price	Amount
1		Sample Collaboration Items	200	each	\$28.00000 USD	\$5,600.00000 USD

Supplier: BOB BARKER COMPANY INC

Total Ordered Excluding Tax and Other Costs: \$5,600.00000 USD

The vendor information has been imported to the Collaboration line item.

Depending on the entity, after Collaboration the PR will now travel through an approval flow.