

# Office for Historically Underutilized Businesses

## Instructions for reporting using the HUB Procurement Report

### Logging in

Once your account has been set up in IPS your User ID, password and the link to log in will be e-mailed to you.

The user name should come from Kim Daniels-Jackson with the Division of Purchase and Contract in the Department of Administration and the password should come from [IPSBIDS@DOA.NC.GOV](mailto:IPSBIDS@DOA.NC.GOV).

The link to the login page is <https://www.ips.state.nc.us/ips/Agency/Logon.aspx>.

### **Lost User IDs / Passwords:**

If you cannot find or forgot your User ID you can contact Kim Daniels-Jackson at [kim.d.jackson@doa.nc.gov](mailto:kim.d.jackson@doa.nc.gov) and get it e-mailed to you.

If you forget your password, go to the logon screen at <https://www.ips.state.nc.us/agency> and click on “Forgot/Change password” (see below). A new password will be e-mailed to you.

### **Web Browsers supported**

We recommend using Internet Explorer as your web browser with IPS, however, in testing we did not experience any particular problems using Mozilla Firefox and Google Chrome. The log on screen should look like this:



State of North Carolina  
Interactive Purchasing System

IPS Logon

---

A screenshot of the IPS Login web form. The form has a blue header with the text "IPS Login". Below the header, it says "Enter UserId and Password to continue...". There are two input fields: "UserId:" and "Password:". To the right of the "Password:" field is a "Log In" button. At the bottom left of the form is a link that says "Forgot/Change Password".

IPS Login	
Enter UserId and Password to continue...	
UserId:	<input type="text"/>
Password:	<input type="password"/>
	<input type="button" value="Log In"/>
<a href="#">Forgot/Change Password</a>	

# Office for Historically Underutilized Businesses

## Instructions for reporting using the HUB Procurement Report

### Basic Steps

Here are the very basic steps for data entry. After this list more detail about each step will be provided.

- 1) Log in
- 2) Click on “Quarterly HUB Information”:
- 3) Click on the Notepad /pencil icon of the report you want to work on.
- 4) Enter all purchase totals for:
  - Term contract purchases (HUB & Non HUB)
  - Commodity Purchases (HUB & Non HUB)
  - Service Purchases (HUB & Non HUB)
- 5) Enter all HUB purchases by HUB category (rounding to the nearest dollar)
- 6) Make sure there are no dollar signs or periods.
- 7) Click **Next** →, at the bottom of the screen.
- 8) Review dollar values on Review/Approve screen and click Back, Approve or Cancel.

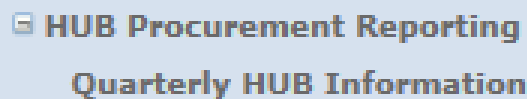
### Step Detail

In the HUB Procurement Reporting system there are two types of users, HUB Reporters and Purchasers.

- HUB Reporters can enter or edit data on HUB Purchasing and approve the data entered as the official quarterly report.
- Purchasers can enter, edit and approve HUB purchasing data, but they can also access a number of other features in IPS (including posting and editing bids, searching for vendors and bids, and other related activities).

The log in the screen you see will depend on what kind of user you are.

If you are a HUB Reporter (all you will be doing in IPS is reporting on HUB purchases) then you will see the following as your menu:



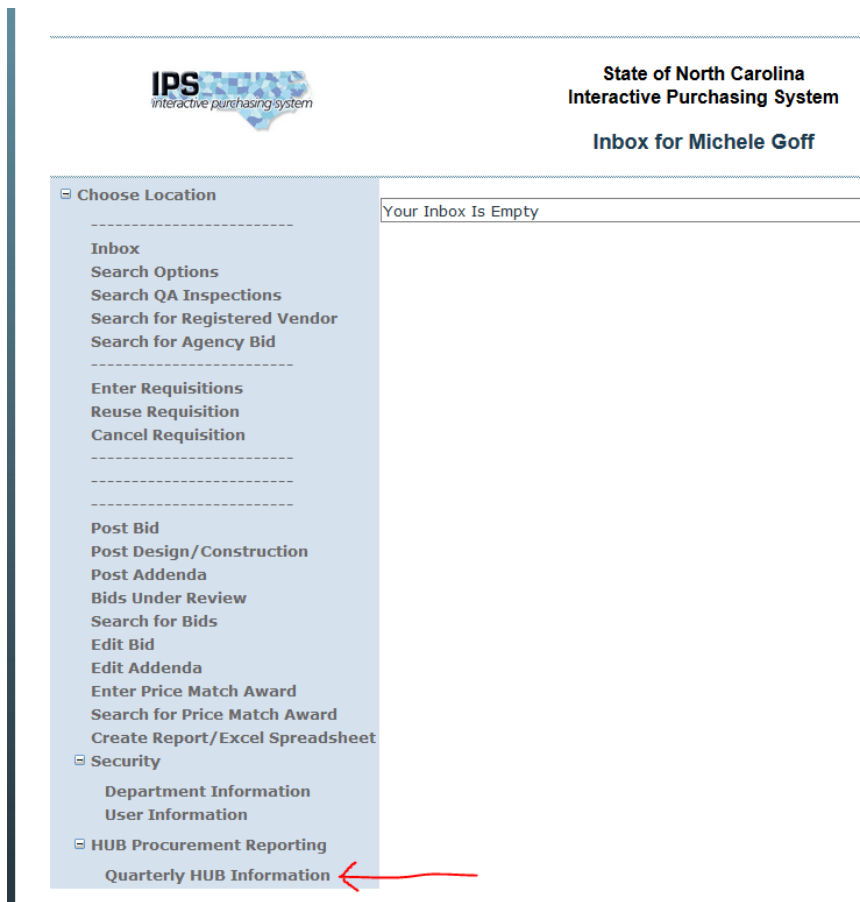
A screenshot of a menu item. The text is displayed in a light blue rectangular box. The text reads: "HUB Procurement Reporting" on the first line and "Quarterly HUB Information" on the second line. The text is in a bold, sans-serif font.

Click on “Quarterly HUB Information”.

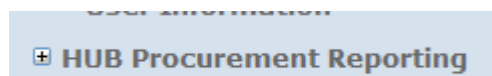
# Office for Historically Underutilized Businesses

## Instructions for reporting using the HUB Procurement Report

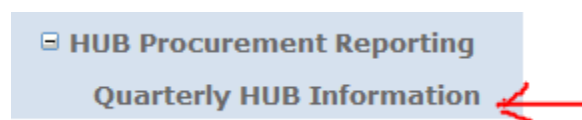
If you are a Purchaser your menu of options will look like the following list. At the bottom of the list is “HUB Procurement Reporting”. Click on “Quarterly HUB Information”.



If the HUB Procurement Reporting item looks like this:



Click the plus symbol so you see this, then click on “Quarterly HUB Information”.



# Office for Historically Underutilized Businesses

## Instructions for reporting using the HUB Procurement Report

Clicking on “Quarterly HUB Information” will direct you to a screen that looks like this:

**State of North Carolina  
Interactive Purchasing System**

**Quarterly HUB Procurement Reporting**

Choose Location

---

Inbox

Search Options

Search QA Inspections

Search for Registered Vendor

Search for Agency Bid

---

Enter Requisitions

Reuse Requisition

Cancel Requisition

---

Post Bid

Post Design/Construction

Post Addenda

Bids Under Review

Search for Bids

Edit Bid

Edit Addenda

Enter Price Match Award

Search for Price Match Award

Create Report/Excel Spreadsheet

Security

Department Information

User Information

HUB Procurement Reporting

Quarterly HUB Information

	<u>Agency</u>	Begin Fiscal Year	Quarter	Status
	DEPARTMENT - Administration	2014	4th - Apr 1 - June 30	Pending

Make sure that the Agency displayed is your agency/school/university/college.

- If the agency displayed is incorrect contact John Guenther at [john.guenther@doa.nc.gov](mailto:john.guenther@doa.nc.gov) and send a screen shot of what you are seeing.

Each Quarter will have its own row and link. The current reporting quarter will be at the top with a status of “Pending” (until you finish entering data and Approve the report, then it will show as “Submitted”).


Click on the notepad and pencil icon to access the appropriate report.

# Office for Historically Underutilized Businesses

## Instructions for reporting using the HUB Procurement Report

Here is what the data entry screen will look like:

---



State of North Carolina  
Interactive Purchasing System

Quarterly HUB Procurement Reporting

---

Agency DEPARTMENT - Administration  
Beginning Fiscal Year 2014  
Quarter 4th - Apr 1 - June 30

Term Contract Purchases(HUB & Non-HUB)	1500
--	------

Term Contract Purchases(HUB)

Black	50
Hispanic	0
Asian American	0
American Indian	0
Female	0
Disabled Owned	0
Disabled Business Enterprise	0
Non-Profit Work Center	0
Socially and Economically Disadvantaged	0

Commodity Purchases(HUB & Non-HUB)	0
------------------------------------	---

Commodity Purchases(HUB)

Black	0
Hispanic	0
Asian American	0
American Indian	0
Female	0
Disabled Owned	0
Disabled Business Enterprise	0
Non-Profit Work Center	0
Socially and Economically Disadvantaged	0

Service Purchases(HUB & Non-HUB)	0
----------------------------------	---

Service Purchases(HUB)

Black	0
Hispanic	0
Asian American	0
American Indian	0
Female	0
Disabled Owned	0
Disabled Business Enterprise	0
Non-Profit Work Center	0
Socially and Economically Disadvantaged	0

---

# Office for Historically Underutilized Businesses

## Instructions for reporting using the HUB Procurement Report

Please double check the Quarter at the top of the screen to make sure you are using the correct quarter's report. It will be possible for users of the system to go back and edit previous reports. Make sure you are entering data in the correct time period.

Agency DEPARTMENT - Administration  
Beginning Fiscal Year 2014  
Quarter 4th - Apr 1 - June 30 

---

To enter data, type in the appropriate boxes.

- Totals by each contract type (Term Contract, Commodity Purchases and Service Purchases) are required.
- Enter HUB purchases by HUB Certification ownership category within each contract type (if no HUB spending occurred in a quarter leave these values as their default of \$0):
  - Black
  - Hispanic
  - Asian American
  - American Indian
  - Female
  - Disabled Owned
  - Disabled Business Enterprise
  - Not-Profit Work Center
  - Socially and Economically Disadvantaged
- It is possible to enter negative numbers in all fields to reflect when change orders decrease the value of a contract.
- To move between fields use the Tab button or click on a field with your cursor.
  - Hitting ENTER stops the data entry and moves you to the next screen for review and approval.

### **What can be reported and what cannot be reported:**

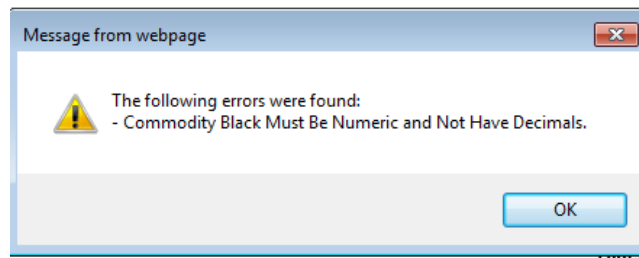
- **Vendors that are HUB Certified can be counted toward HUB spending.**
- Data entered can include purchase orders, direct pay and p-card spending.
- **If a vendor is not HUB Certified, spending with that vendor cannot be counted toward HUB spending.**
- Please note that there is no category for Minority-Owned without a specific ethnicity category, nor is there a HUB Subcontractor option.
- If you are uncertain what the HUB Category for a vendor is please check the HUB vendor search page at: <https://www.ips.state.nc.us/vendor/searchvendor.aspx?t=h>.

# Office for Historically Underutilized Businesses

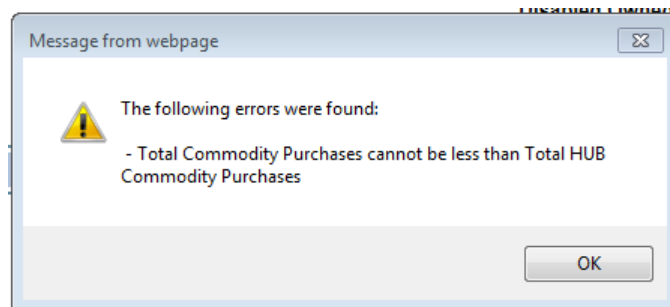
## Instructions for reporting using the HUB Procurement Report

### Data Entry details / Error Messages:

- Do not enter a \$ symbol or period with your entries, if you do you will get an error.
- Data fields will accept whole dollar values only (55). Round the values you enter to the nearest dollar.



- If you enter values in a HUB Category without also including a contract category value (for example leaving Commodity with the default 0 and entering 65 for Hispanic) you will get the following error.



After you click **Next** →, your data will be saved and you should see the screen on the following page that shows the dollar values you just entered as well as the percentages for each type of purchase and HUB category. At this point you could log out and come back to Approve or edit your report. Another person in your organization with access to IPS could also make edits or approve the report.

There are three buttons on this screen:

- **Back** – If you see an error on this screen you can go back to the data entry screen and make changes
- **Approve** – If all the dollar values have been reviewed and are correct you can hit Approve and the report will be submitted to the HUB Office as your official quarterly report.
  - Note: *Anyone with access the HUB Procurement Reporting System can hit the Approve button, but it is up to each entity to decide who is allowed to approve the report as ready to be submitted to the HUB Office for their organization.*

# Office for Historically Underutilized Businesses

## Instructions for reporting using the HUB Procurement Report

- **Cancel** – Clicking Cancel takes you back out to the Quarterly HUB Procurement Reporting screen where you can select which quarter you want to work on. The data you already entered will be saved.
  - You could do this if your role is to enter data but not approve it, or if you were not ready to submit the report for some reason (such as wanting to verify that certain purchases by HUB certified vendors were indeed being counted).

Once you hit approve you are done with quarterly reporting (unless you determine you need to make corrections at some point).

State of North Carolina Interactive Purchasing System		
Quarterly HUB Procurement Reporting		
Agency	DEPARTMENT - Administration	
Beginning Fiscal Year	2014	
Quarter	4th - Apr 1 - June 30	
<b>Total All Purchases(HUB &amp; Non-HUB)</b>	<b>\$17,500</b>	<b>%</b>
<b>Term Contract Purchases(HUB &amp; Non-HUB)</b>	<b>\$1,500</b>	<b>8.57%</b>
Black	50	0.29%
Hispanic	0	0.00%
Asian American	0	0.00%
American Indian	0	0.00%
Female	600	3.43%
Disabled Owned	0	0.00%
Disabled Business Enterprise	0	0.00%
Non-Profit Work Center	0	0.00%
Socially and Economically Disadvantaged	0	0.00%
<b>Term Contract Purchases(HUB)</b>	<b>\$650</b>	<b>3.71%</b>
<b>Commodity Purchases(HUB &amp; Non-HUB)</b>	<b>\$16,000</b>	<b>91.43%</b>
Black	0	0.00%
Hispanic	65	0.37%
Asian American	0	0.00%
American Indian	0	0.00%
Female	0	0.00%
Disabled Owned	8900	50.86%
Disabled Business Enterprise	0	0.00%
Non-Profit Work Center	0	0.00%
Socially and Economically Disadvantaged	0	0.00%
<b>Commodity Purchases(HUB)</b>	<b>\$8,965</b>	<b>51.23%</b>
<b>Service Purchases(HUB &amp; Non-HUB)</b>	<b>\$0</b>	<b>0.00%</b>
Black	0	0.00%
Hispanic	0	0.00%
Asian American	0	0.00%
American Indian	0	0.00%
Female	0	0.00%
Disabled Owned	0	0.00%
Disabled Business Enterprise	0	0.00%
Non-Profit Work Center	0	0.00%
Socially and Economically Disadvantaged	0	0.00%
<b>Service Purchases(HUB)</b>	<b>\$0</b>	<b>0.00%</b>
<-- Back	Approve	Cancel



# Office for Historically Underutilized Businesses

## Instructions for reporting using the HUB Procurement Report

### Logging Out

There is no logout button, but you will be disconnected from the system when you close your browser or it is open for too long with no activity (approximately 20 minutes).

### Problem Reporting

If you encounter an error or have a problem please contact the HUB Office Compliance Officer, John Guenther, at 919-807-2436 or by e-mail at [john.guenther@doa.nc.gov](mailto:john.guenther@doa.nc.gov). E-mailing a screenshot of the problem would be helpful in determining a solution.

### Audit Notice

All reported information submitted to the Office for Historically Underutilized Businesses is subject to audit and review.