



## NC E-Procurement @ Your Service eRequisition Course eRequisition Punchout Item Process Guide

Some State of North Carolina term contract suppliers have created punchout websites containing negotiated term contract items. These punchout sites are accessible through the NC E-Procurement term contract catalog. A punchout site is a website created and maintained by the supplier specifically for the State of North Carolina. Users do not need to enter a new user ID or password to enter the supplier's punchout site. The supplier's website will automatically recognize users from NC E-Procurement, and after the buyer has selected items on the supplier's website, the items are automatically transferred into NC E-Procurement as line items on the eRequisition. Once completed, the purchase order will be delivered to the supplier through NC E-Procurement.

1. Conduct a catalog search for the supplier's punchout site. Under the **'Search'** Portlet, select **'Catalog'** and enter the supplier's name to search for their punchout site. Alternatively, select **'Catalog'** from the **'Search'** drop-down menu of the Command Bar and enter the supplier's name in the **'Search'** field.

The screenshot displays the NC E-Procurement user interface. At the top, the logo and navigation links are visible. The main content area is divided into several portlets:

- Home Dashboard:** Contains links for 'Create eRequisition' and 'Manage Reports'.
- To Do:** A table with columns for ID, Date, From, Status, Title, and Required Action. It currently shows 'No items'.
- Search:** The active portlet. It features a 'Catalog' dropdown menu, a search input field containing 'Contract Vendor 123', and a 'Search' button. Below the search field, a list of categories is displayed with their respective item counts:
  - AGRICULTURAL EQUIPMENT, SUPPLIES & CHEMICALS (1824)
  - APPLIANCES, ELECTRICAL, CLOCKS (10394)
  - BUILDING MATERIALS, MAINTENANCE (3573)
  - CLOTHING & TEXTILE ITEMS (1366)
  - FOOD & RELATED ITEMS
  - FURNITURE (OFFICE, EDUCATIONAL AND HEALTH CARE) (1790)
  - HIGHWAY CONSTRUCTION EQUIPMENT, GROUNDS (3103)
  - More Categories ...
- News:** A banner for 'Welcome to NC E-Procurement Version 2.0!' with a message to visit the NCEP Home Page for job-aids and training opportunities.



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- Buyers may punch out, or leave, the system to view term contract items on the supplier's website by selecting the link for the supplier's name where the words **'Punchout Catalog'** are displayed.

The screenshot displays the NCE-Procurement system interface. At the top, it shows the logo and navigation options like 'Home', 'Help', and 'Logout'. Below the navigation bar, there's a search bar with 'Catalog' selected and 'ibm' entered. The search results are categorized under 'Supplier Punchout Catalog Resources'. Two specific results are highlighted with dashed circles and arrows pointing to a yellow callout box:

- Lenovo (Punchout Catalog) - 204A Microcomputers**
- IBM (Punchout Catalog)...204A**

The callout box contains the text: "To redirect a search to a supplier's punchout catalog, click the link for the supplier's name where the words 'Punchout Catalog' are displayed." Below the search results, there are product listings for 'Training Equipment, Instrumentation and Control ...' and 'Training Equipment, Programmable Logic Control ...', both supplied by 'Hampden Engineering Corporation'. Each listing includes a price, quantity field, and 'Add to Cart' button.



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**Note:** Users may also enter the word 'punchout' in the 'Keywords' field to view all available punchout sites at once.

The screenshot shows the NCE-Procurement search results for the keyword 'punchout'. The search bar is highlighted with a dashed circle. A yellow callout box contains the text: "To punch out to the contract supplier website, click a link that contains the words 'Punchout Catalog.'" Several search results are listed, including links to various suppliers' punchout catalogs, such as "Hewlett-Packard (Compaq) (Punchout Catalog)", "Carolina Biological (Punchout Catalog)", and "Lenovo (Punchout Catalog)".

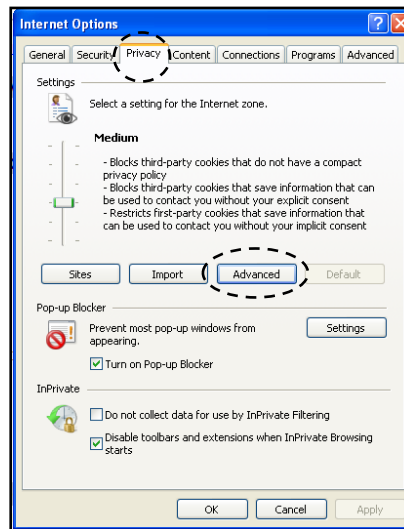
**Note:** The individual suppliers maintain their own supplier punchout sites. NC E-Procurement maintains a list of current punchout sites and their availability. This list can be found on the NC E-Procurement Home Page by following the below link: [http://eprocurement.nc.gov/Buyer/Punchout\\_Catalog\\_Status.html](http://eprocurement.nc.gov/Buyer/Punchout_Catalog_Status.html). If a supplier's punchout site is unavailable, NC E-Procurement will update this page with ordering instructions for the particular vendor.

**Note:** If a buyer decides to end a punchout shopping session before any items are selected, they may return to the eRequisition by clicking the 'Close Punchout Catalog Shopping Session' button.

The screenshot shows the IBM online store interface. The top right corner features a "Welcome NCAS Requester" message and a "Close Punchout Catalog Shopping Session" button, which is circled with a dashed line. The main content area displays the IBM logo, "United States", and a "Shop IBM" banner. A "Quick order" section is visible on the right, along with a "Price list" section.

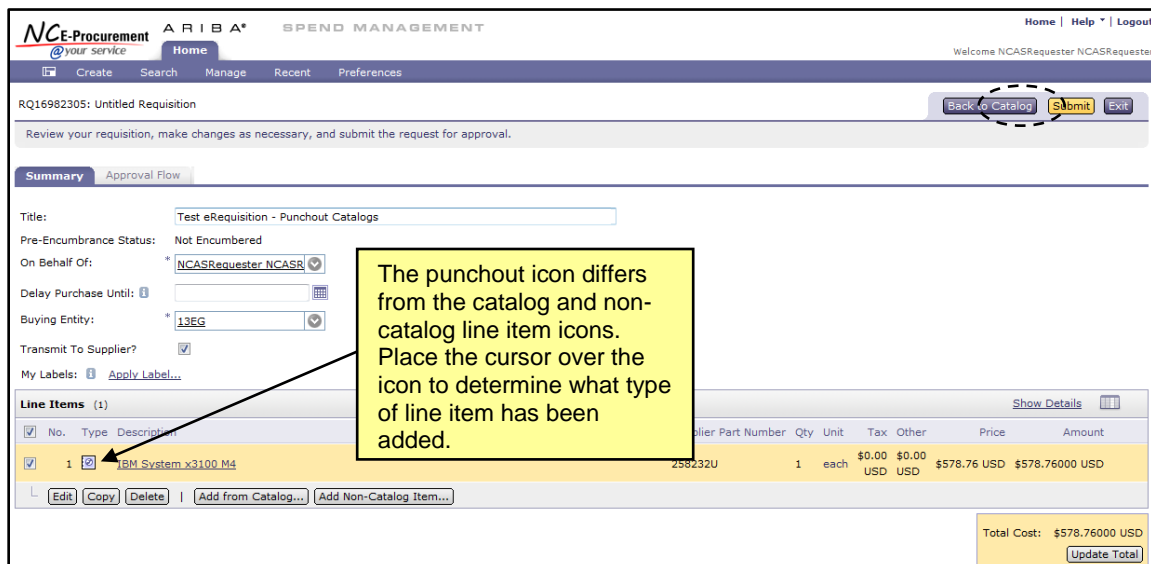
If you are having problems accessing the punchout catalogs, the browser security settings may be set too high. To update browser settings, follow the steps below:

1. Select **'Tools'** from the browser menu bar and select **'Internet Options.'**
2. Select the **'Privacy'** tab.
3. Select the **'Advanced'** button. Confirm that the **'Accept'** radio button is selected under **'Third Party Cookies.'**



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

1. Complete the eRequisition by entering any additional information and clicking the **'Submit'** button.





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2. In some cases, punchout line items need to be edited. For these line items, users must check the box next to the appropriate line item and click **'Edit'** on the eRequisition Summary page.

**Note:** Some fields are locked at the eRequisition level and must be changed by returning to the supplier's punchout site.

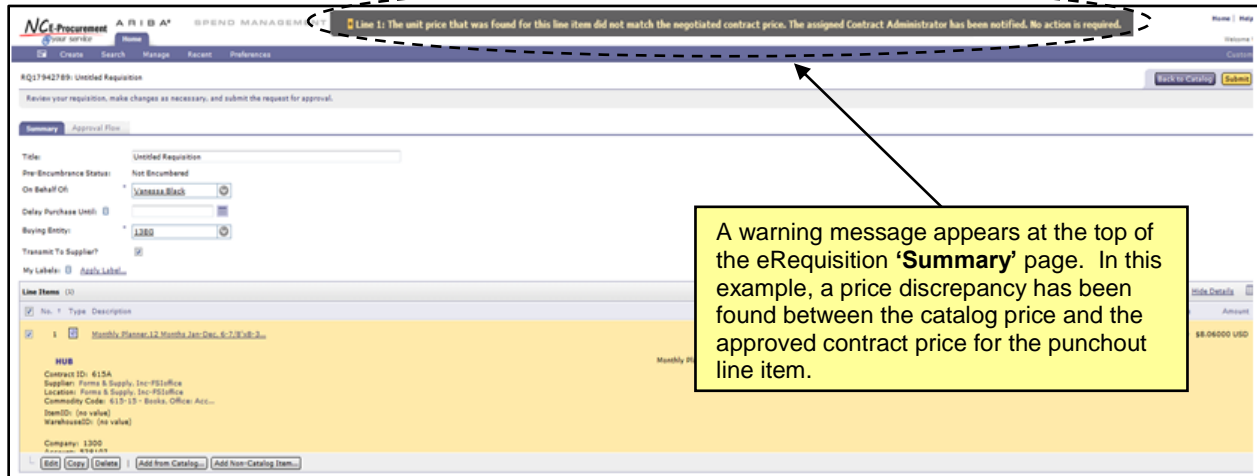
From the eRequisition, a user may edit the **'Commodity Code'** or **'Contract Type.'** Users may also add accounting information, but the **'Qty'** and **'Supplier Part Number'** fields are locked. To edit these fields, users must return to the supplier punchout catalog by clicking **'Edit this Punchout Catalog Item.'**

Punchout Audit Functionality allows for price information to be monitored in NC E-Procurement for the items that are available on a supplier's punchout catalog. A contract-specific Contract Administrator approval group may appear in the approval flow as a watcher when a discrepancy is found between the items available on the supplier's punchout catalog and the items that have been approved per the contract terms. Additionally, a warning message will appear at the top of the eRequisition **'Summary'** page during this time. Please note this warning message will not prevent an eRequisition from being submitted or approved, and no action is required by the user. The appropriate Contract Administrator will be notified via email and will be expected to review the discrepancies that were found.

1. When a punchout item is added to an eRequisition, and it is found to have a discrepancy between the punchout catalog price and the approved contract price, a warning message will appear at the top of the eRequisition **'Summary'** page which reads, "The unit price that was found for this line item did not match the negotiated contract price. The assigned Contract Administrator has been notified. No action is required."

If a punchout item is found to have a catalog price which appears to be greater than the approved contract price, the unit price of the item will automatically be reduced on the eRequisition to reflect the approved contract price once the user punches back into NC E-Procurement.

- When a punchout item is added to an eRequisition, and the item is not found on the approved price list for the punchout catalog, a warning message will appear at the top of the eRequisition **'Summary'** page which reads, "No negotiated contract price can be found for this line item. The assigned Contract Administrator has been notified. No action is required."



The warning message will appear and a watcher will be added on the eRequisition only during the creation of an initial eRequisition or when a new punchout item has been added to a change order, whenever applicable. Updating the quantity of an existing punchout item on a change order will not add a Contract Administrator approval group to the approval flow, and Contract Administrator approval groups will never be added for non-catalog items or regular catalog items. It is possible for multiple Contract Administrators to be added to the eRequisition approval flow if the requester has added items from multiple punchout catalogs.