
Training Outline for Procurement Specialists

- 1.0 Purpose** – To outline the training necessary for procurement of goods and services for all three laboratories of the State Crime Laboratory.
- 2.0 Scope** – This procedure applies to Procurement Specialists of Administrative Operations and employees performing related duties. This training outline shall be followed by all trainees, regardless of experience level.
- 3.0 Overall Training Guideline** - Independent performance of tasks shall be allowed only after the trainee has received authorization through successful completion of related training module(s) and documented approval by the training officer.
- 4.0** The training will be divided into two parts. Part one will be covered in modules I through VI. Part two will be covered in module VII. The trainee must complete part one prior to beginning part two.
- 5.0 Module I – General Overview of Procurement**
 - 5.1 Objectives** – To develop and demonstrate general knowledge and/or practical skills in the following:
 - 5.1.1** DOJ Financial Services procurement procedures
 - 5.1.2** State Purchasing and Contracts procurement procedures
 - 5.2 Reading Assignments**
 - 5.2.1** DOJ Procurement Manual
 - 5.3 Tasks**
 - 5.3.1** Read literature pertaining to this module.
 - 5.3.2** The trainee shall review and become familiar with the NC Department of Administration Purchase and Contract website:
<https://ncadmin.nc.gov/about-doa/divisions/purchase-contract>
 - 5.3.3** The trainee shall review and become familiar with the NC Administrative Codes and how to find updates on those codes:
<http://reports.oah.state.nc.us/ncac.asp?folderName=%5CTitle%201%20-%20Administration%5CChapter%2005%20-%20Purchase%20and%20Contract>
 - 5.3.4** The training officer shall instruct and demonstrate the following to the trainee:
 - 5.3.4.1** Order requests by end-users
 - 5.3.4.2** Evaluation and categorization of orders
 - 5.3.4.3** Account selection of orders

5.3.4.4 Laboratory costs centers

5.3.4.4.1 General funds

5.3.4.4.2 Grant funds

5.3.4.5 Weekly order processing

5.3.4.5.1 E-procurement entry deadlines

5.3.4.5.2 Approved purchase orders

5.3.4.5.3 Requisition printout

5.3.4.5.4 Filing of open orders

5.3.5 The trainee shall meet with lab legal counsel to discuss the ethical and legal responsibilities involved in being a lab employee entrusted as a part of the procurement process.

6.0 Module II – Introduction to Entering Orders in E-Procurement (Goods).

6.1 Objectives – To develop and demonstrate knowledge and/or practical skills in the use of E-procurement for the following:

6.1.1 Punch-out orders for catalog items.

6.1.2 Non-Catalog items

6.1.3 Commodity Codes

6.1.4 Attachment of quotes and internal purchase requests to requisitions

6.1.5 Header information for each requisition entered.

6.1.6 “Ship to” codes for Raleigh, Triad and Western Laboratories.

6.1.7 Buying Entity

6.1.8 Iran check for non-routine vendors:

6.1.8.1 <https://www.nctreasurer.com/inside-the-department/OpenGovernment/Reports/Divestment%20-%202018-08-30%20-%20Iran.pdf>

6.1.8.2 <https://www.nctreasurer.com/inside-the-department/OpenGovernment/Reports/Divestment%20-%202018-08-30%20-%20Iran%20Subsidiaries.pdf>

6.1.9 State Term Contracts

6.2 Reading Assignments - N/A

6.3 Tasks

6.3.1 The trainee shall complete the following E-procurement online training modules located at <https://eprocurement.nc.gov/training/buyer-web-based-training> :

6.3.1.1 System Navigation

6.3.1.2 Requisitioning

6.3.1.3 Choosing the Correct Commodity Code

6.3.1.4 Executive Leadership: Procurement Basics

6.3.2 The trainee shall complete Introduction to Procurement and E-procurement classes with Purchasing and Contracts as soon as each class has availability.

6.3.3 The trainee shall review and become familiar with the E-procurement website:
<https://eprocurement.nc.gov/>

6.3.4 The trainee shall review and become familiar with the Statewide Term Contracts list:
<https://ncadmin.nc.gov/statewide-term-contracts>

6.3.5 The training officer shall demonstrate the use of the Statewide Term Contract Catalog Search:
https://buyer.ncgov.com/Buyer/Main/aw?awh=r&awssk=ag_a&passwordadapter=PasswordAdapter5&dard=1

6.3.6 The training officer shall demonstrate the use of creating requisitions in the E-procurement system.

6.3.7 The trainee shall create five requisitions in E-procurement.

6.4 Evaluation

6.4.1 Through the use of the approval process in E-procurement, the trainee shall demonstrate to the training officer their ability to create requisitions for goods in E-procurement.

7.0 Module III – Introduction to Entering Orders in E-Procurement (Services).

7.1 Objectives – To develop and demonstrate knowledge and/or practical skills in the use of E-procurement for the following:

7.1.1 DOJ account selection

7.1.2 Line entries

7.1.3 Buying entity

7.2 Reading Assignments – N/A

7.3 Tasks

7.3.1 The trainee shall complete the tasks listed in sections 6.3.2, 6.3.3, and 6.3.4.

7.3.2 The training officer shall demonstrate creating requisitions for services in E-procurement to include proper DOJ account selection, line entries, and buying entity.

7.3.3 The trainee shall create five requisitions in E-procurement

7.4 Evaluation

7.4.1 Through the use of the approval process in E-procurement, the trainee shall demonstrate to the training officer their ability to create requisitions for services in E-procurement.

8.0 Module IV – Receiving of Goods and Services

8.1 Objectives – To develop and demonstrate knowledge and/or practical skills to receive goods and services in E-procurement:

8.2 Reading Assignments-N/A

8.3 Tasks

8.3.1 The trainee shall complete the “Receiving Module” located at <https://eprocurement.nc.gov/training/buyer-web-based-training>:

8.3.2 The training officer shall instruct and demonstrate the following tasks for receipt of goods:

8.3.2.1 Use of requisition number and receiving button for goods in E-procurement.

8.3.2.2 Notation of items received on the packing slip.

8.3.2.3 Entry of packing slip/delivery number into E-procurement.

8.3.2.4 Notation of the date of receipt of the goods as well as who signed for them.

8.3.2.5 Attachment of the packing slip/delivery ticket or email to the requisition in E-procurement.

8.3.2.6 Correction to a requisition prior to receiving.

8.3.2.7 Correction to a requisition after receiving.

8.3.3 The training officer shall instruct and demonstrate the following tasks for receipt of services:

8.3.3.1 Entering the dollar amount as accepted

8.3.3.2 Entering the date of service completed

8.3.3.3 Documenting who confirmed the service

8.3.3.4 Attaching email confirmation or service receipt into the requisition in E-procurement.

8.3.3.5 Correcting a requisition prior to receiving a service.

8.3.3.6 Correcting a requisition after receiving a service.

8.3.4 The trainee shall receive five packing slips for goods and services in E-procurement.

8.4 Evaluation

8.4.1 The training officer shall go into E-procurement and evaluate all five receipt transactions for accuracy.

9.0 Module V – Non-routine Requests

9.1 Objectives – To develop and demonstrate knowledge and/or practical skills in non-routine requests.

9.2 Reading Assignments – N/A

9.3 Tasks

9.3.1 The training officer shall explain and demonstrate the following tasks.

9.3.1.1 Processing of ergonomic requests.

9.3.1.2 Confirming purchase orders.

9.3.1.3 Obtaining approval for service requests.

9.3.1.4 Processing of internal purchase orders.

9.3.1.5 Processing of Information Technology (IT) purchases.

9.3.1.6 Processing of the Informal Request for Quote form.

9.3.2 The trainee shall fill out all forms associated with the tasks listed above.

9.4 Evaluation

9.4.1 The training officer shall review all forms and requests completed by the trainee for accuracy.

10.0 Module VI- Requisition Review and Approval

10.1 Objective- To develop and demonstrate knowledge and/or practical skills in the review and approval of requisitions.

10.2 Reading Assignments-N/A

10.3 Tasks

10.3.1 The trainee shall complete the following E-procurement online training modules located at <https://eprocurement.nc.gov/training/buyer-web-based-training> :

10.3.1.1 Approving Process

10.3.2 The training officer shall discuss and explain the “Requisition Review and Approval” checklist.

10.3.3 The trainee shall complete at least five requisition review and approvals using the “Requisition Review and Approval” checklist.

10.4 Evaluation

10.4.1 Prior to the trainee approving the requisition in E-procurement, the training officer shall review the requisition and the documented approval checklist for accuracy.

11.0 Module VII – Contracts

11.1 Objectives – To develop and demonstrate knowledge and/or practical skills in the following:

11.1.1 Request for Quote (RFQ)

11.1.2 Invitation for Bid (IFB)

11.1.3 Request for Proposal (RFP)

11.2 Reading Assignments - N/A

11.3 Tasks

11.3.1 The training officer shall demonstrate and discuss the following items/steps needed when creating a Request for Quote (RFQ):

-
- 11.3.1.1** Creation of a Request for Quote.
 - 11.3.1.2** Requirement for Waiver of Competition.
 - 11.3.1.3** Requirement for Sole Source Justification letter.
 - 11.3.1.4** Submission of RFQ to Purchasing and Contracts/DIT for approval.
 - 11.3.1.5** Submission of RFQ to the Vendor and review of Vendor's response.
 - 11.3.1.6** Submission of recommendation memo to Purchasing and Contracts/DIT.
 - 11.3.1.7** Receipt of Approval from Purchasing and contracts/DIT.
 - 11.3.1.8** Generation of request memo to DOJ CFO for approval.
 - 11.3.1.9** Completion of executed RFQ.
 - 11.3.1.10** Renewal of RFQ.
 - 11.3.1.11** Extension of RFQ.
 - 11.3.1.12** Amendment to RFQ
 - 11.3.2** The trainee shall complete at least two Requests for Quote.
 - 11.3.3** The training officer shall demonstrate and discuss the following items/steps needed when creating an Invitation for Bid (IFB):
 - 11.3.3.1** Creation of the Invitation for Bid (IFB).
 - 11.3.3.2** Submission of the IFB to Purchasing and Contracts/DIT for approval.
 - 11.3.3.3** Posting of the Bid and Addendum(s).
 - 11.3.3.4** Opening of Bids.
 - 11.3.3.5** Review of bid responses.
 - 11.3.3.6** Submission of recommendation memo to Purchasing and Contracts/DIT.
 - 11.3.3.7** Receipt of Approval from Purchasing and Contracts/DIT.
 - 11.3.3.8** Generation of request memo to DOJ CFO for approval.
 - 11.3.3.9** Completion of executed IFB.
 - 11.3.3.10** Renewal of IFB.

11.3.3.11 Extension of IFB.

11.3.3.12 Amendment of IFB

11.3.4 The trainee shall complete at least two IFBs.

11.3.5 The training officer shall demonstrate and discuss the following items/steps needed when creating a Request for Proposal (RFP):

11.3.5.1 Creation of the Request for Proposal (RFP).

11.3.5.2 Submission of the RFP to Purchasing and Contracts/DIT for approval.

11.3.5.3 Posting of the Bid and Addendum(s).

11.3.5.4 Opening of Bids.

11.3.5.5 Review of bid responses.

11.3.5.6 Submission of recommendation memo to Purchasing and Contracts/DIT.

11.3.5.7 Receipt of Approval from Purchasing and Contracts/DIT.

11.3.5.8 Generation of request memo to DOJ CFO for approval.

11.3.5.9 Completion of executed RFP.

11.3.5.10 Renewal of RFP.

11.3.5.11 Extension of RFP.

11.3.5.12 Amendment of RFP.

11.3.6 The trainee shall complete at least two RFPs.

11.4 Evaluation

11.4.1 The training officer shall review each Request for Quote, Invitation for Bid, and Request for Proposal for accuracy.

12.0 Records

- Training File

13.0 Attachments – N/A

Revision History		
Effective Date	Version Number	Reason
12/12/2019	1	Original document