

Procurement Specialist I Training Outline Part One

| | Initials/Date Trainee | Initials Trainer |
|---|--------------------------|---------------------|
| <u>Module I – General Overview of Procurement</u> | | |
| Read/become familiar with DOJ and Purchasing and Contracts procurement procedures. | _____ | _____ |
| Review NC DOA P&C website and NC Admin. Codes | _____ | _____ |
| How orders are requested by End-Users | | |
| Order requests by end-users | _____ | _____ |
| Evaluation and categorization of orders | _____ | _____ |
| DOJ Account Selection (provided list with descriptions) | | |
| Supplies (533) | _____ | _____ |
| Equipment (534) | _____ | _____ |
| Lab's Cost Centers | | |
| General Fund | _____ | _____ |
| Grant Fund | _____ | _____ |
| Weekly Order Process | | |
| Deadline for entry into E-Procurement | _____ | _____ |
| PO to End-Users after approval | _____ | _____ |
| Printout RQ for Receiving Process | _____ | _____ |
| Filing of open orders for receiving | _____ | _____ |
| Meet with Legal Counsel on Ethical and Legal Responsibilities | _____ | _____ |
| <u>Module II – Introduction to Entering Orders in E-Procurement (Goods)</u> | | |
| Order entry into E-Procurement for Goods | | |
| Punch-out Orders (Catalog Items) | _____ | _____ |
| Non-Catalog items | _____ | _____ |
| Commodity Codes – selecting BEST fit (Non 900 numbers) | _____ | _____ |
| Attachment of quotes and internal POs to RQ | _____ | _____ |
| Header information | _____ | _____ |
| “Ship to” Codes – Raleigh, Triad and Western | _____ | _____ |
| Buying Entity – 09EI | _____ | _____ |
| Iran check | _____ | _____ |
| State Term Contracts (STC) | _____ | _____ |
| Web-Based Training | | |
| System Navigation | _____ | _____ |
| Requisitioning | _____ | _____ |
| Choosing the Correct Commodity Code | _____ | _____ |
| Executive Leadership: Procurement Basics | _____ | _____ |
| Read/become familiar with E-Procurement Website | _____ | _____ |

Read/become familiar with Statewide Term Contracts List
Create five (5) requisitions in E-Procurement

| | |
|-------|-------|
| _____ | _____ |
| _____ | _____ |

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

Order entry into E-Procurement for Services

DOJ Account – Services/Repair (532)

Line Entry: \$ amount as Qty/dollar as Unit/\$1.00 as Price

Buying Entity – 09EJ

Create five (5) requisitions in E-Procurement

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| _____ | _____ |
| _____ | _____ |
| _____ | _____ |
| _____ | _____ |

Module IV - Receiving of Goods and Services

Web-Based Training

Receiving Module

Receiving in E-Procurement

Use of RQ number to have access to Receive button

Notation of items received on Packing Slip

Entry of packing slip/delivery number into E-Procurement

Notation of date of receipt and who signed for items

Attach packing slip/delivery ticket or email to RQ

Correction to a requisition prior to receiving

Correction to a requisition after receiving

**Receive five (5) packing slips for goods and services
in E-Procurement**

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|-------|-------|
| _____ | _____ |
| _____ | _____ |
| _____ | _____ |
| _____ | _____ |
| _____ | _____ |
| _____ | _____ |
| _____ | _____ |
| _____ | _____ |

Module V – Non-routine Requests

Ergonomic requests

Confirming POs

Approval for service requests

Internal POs

DOJ-IT purchases

Informal Request for Quote form

| | |
|-------|-------|
| _____ | _____ |
| _____ | _____ |
| _____ | _____ |
| _____ | _____ |
| _____ | _____ |
| _____ | _____ |

Module VI – Requisition Review and Approval

Web-Based Training: Approving Process

Requisition Review and Approval Checklist

Review/Approve five (5) requisition using the checklist

| | |
|-------|-------|
| _____ | _____ |
| _____ | _____ |
| _____ | _____ |