

Office for Historically Underutilized Businesses

Instructions for reporting using the HUB Procurement Report

State Policy to seek HUB Participation

Per [NC General Statute 143-48](#) “It is the policy of this State to encourage and promote the use of small contractors, minority contractors, physically handicapped contractors, and women contractors in State purchasing of goods and services.”

Reporting on goods and services spending from term contracts (statewide term contracts) and open-market contracts (non-statewide contracts for goods and services) is conducted on a quarterly basis using the NC Interactive Purchasing System’s (IPS) HUB Reporting System.

Reports are due on the following schedule (even if the due date is a weekend or holiday):

Period	Dates Covered	Due Date
1 st Quarter	July 1 to September 30	October 30
2 nd Quarter	October 1 to December 31	January 30
3 rd Quarter	January 1 to March 31	April 30
4 th Quarter	April 1 to June 30	July 30

Please note that these instructions will not describe how a public entity gathers the information that needs to be entered in the IPS HUB Reporting System. Each reporting entity is given autonomy to gather their unique data to report in the IPS system. The information provided gives instructions and guidance on how to access and input information into the IPS HUB Reporting System.

Basic Steps

Here are the basic steps for data entry. More detail about each step is provided below.

- 1) Log in
- 2) Click on “Quarterly HUB Information”:
- 3) Click on the Notepad /pencil icon of the desired report.
- 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.

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Gaining Access to the HUB Procurement Report

To access the IPS HUB Reporting System an individual needs an IPS User ID with HUB Reporting System access. ID's are set up for specific individuals and only that person should use that User ID. Typical turn-around time to create a new ID is 1-2 business days.

Access should be requested by e-mailing the HUB Office at doa.hub.reporting@doa.nc.gov with the subject line "IPS User ID Request" and should include the following information about the new user:

- Full Name
- Title
- Phone number
- E-mail address

It is preferred that the e-mail request come from the new user's supervisor or one of the current HUB Reporting contacts. Once the new IPS User ID has been set up the User ID, the password and the link to log in will be e-mailed to the new user from IPSBIDS@DOA.NC.GOV.

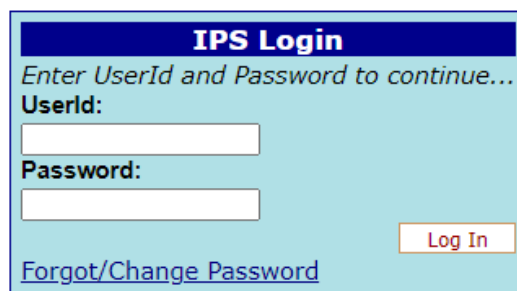
Step 1: Logging in

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 the NC HUB Office at doa.hub.reporting@doa.nc.gov with a subject title of "HUB Goods and Services Reporting – lost IPS User ID."

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.

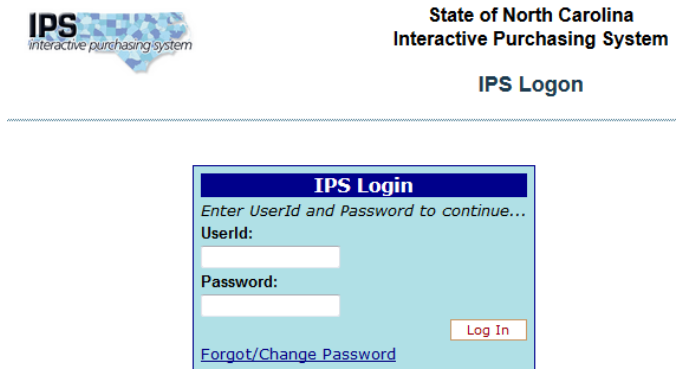


Web Browsers supported

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Microsoft Edge is the recommended web browser to use 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:



Types of Users:

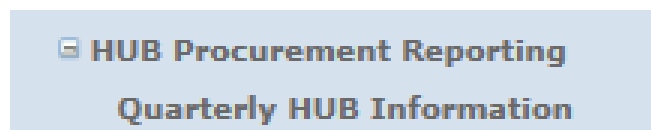
In the HUB Procurement Reporting system there are two types of users, HUB Reporters and Purchasers.

- 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).

Step 2: Click on “Quarterly HUB Information”

The menu shown after log in will depend on the user type.

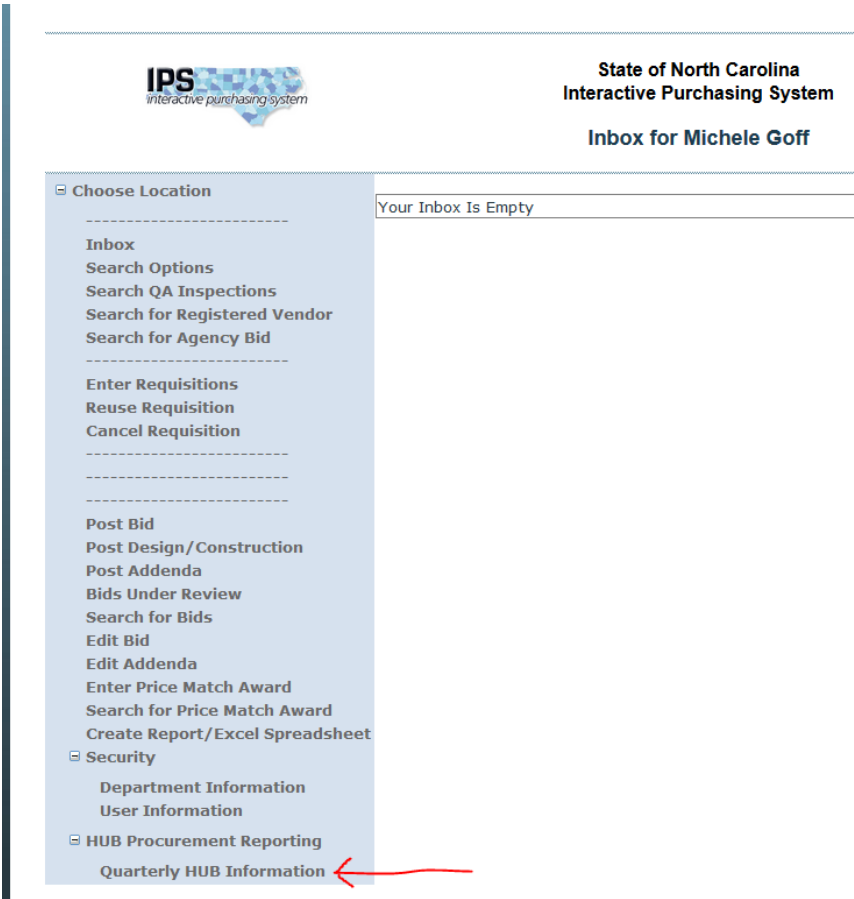
If you are a HUB Reporter (all you will be doing in IPS is reporting on HUB purchases) then you will see the following as your menu:



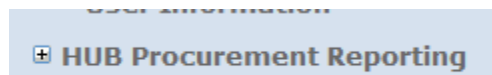
If you are a Purchaser your menu of options will look like the following list. At the bottom of the list is “HUB Procurement Reporting”. Click on “Quarterly HUB Information”.

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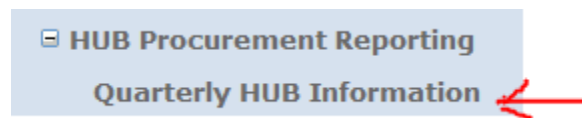
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If the HUB Procurement Reporting item looks like this:



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



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

		1 2			
View	Edit	Agency	Fiscal Year	Quarter	Status
		CC - Wake Technical Community College	2015 - 2016	1st - July 1 - Sept 30	Submitted
		CC - Wake Technical Community College	2015 - 2016	2nd - Oct 1 - Dec 31	Submitted
		CC - Wake Technical Community College	2015 - 2016	3rd - Jan 1 - Mar 31	Submitted
		CC - Wake Technical Community College	2015 - 2016	4th - Apr 1 - June 30	Submitted
		CC - Wake Technical Community College	2016 - 2017	1st - July 1 - Sept 30	Submitted
		CC - Wake Technical Community College	2016 - 2017	2nd - Oct 1 - Dec 31	Submitted
		CC - Wake Technical Community College	2016 - 2017	3rd - Jan 1 - Mar 31	Submitted
		CC - Wake Technical Community College	2016 - 2017	4th - Apr 1 - June 30	Submitted
		CC - Wake Technical Community College	2017 - 2018	1st - July 1 - Sept 30	Submitted
		CC - Wake Technical Community College	2017 - 2018	2nd - Oct 1 - Dec 31	Submitted
		CC - Wake Technical Community College	2017 - 2018	3rd - Jan 1 - Mar 31	Submitted
		CC - Wake Technical Community College	2017 - 2018	4th - Apr 1 - June 30	Submitted
		CC - Wake Technical Community College	2018 - 2019	1st - July 1 - Sept 30	Submitted
		CC - Wake Technical Community College	2018 - 2019	2nd - Oct 1 - Dec 31	Submitted
		CC - Wake Technical Community College	2018 - 2019	3rd - Jan 1 - Mar 31	Submitted

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

- If the agency displayed is incorrect send a screenshot of what you are seeing to doa.hub.reporting@doa.nc.gov.

Each Quarter will have its own row and link. Each quarter will have a Status of Approved (report has officially been submitted) or Pending (data may be present but the report has not officially been submitted). Please note that there are now multiple pages of reports so you may need to click on page 2 to find the most recent report.

To view but NOT change any data click on the open book image under the View column.

To add or change data click on the notepad and pencil icon under the Edit column.

- If you click on this icon when the report status is “Approved” the system will automatically change the Status to “Pending” and you will have to re-approve the report.

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Step 3: Click on the Notepad/pencil icon of the desired report.

Here is what the data entry screen will look like:

The screenshot shows the data entry interface for the State of North Carolina's Interactive Purchasing System. The header includes the IPS logo and the text "State of North Carolina Interactive Purchasing System Quarterly HUB Procurement Reporting". The user has selected "Agency DEPARTMENT - Administration", "Beginning Fiscal Year 2014", and "Quarter 4th - Apr 1 - June 30".

The form is divided into three main sections for reporting purchases:

- Term Contract Purchases(HUB & Non-HUB):** The total value is 1500. Below this, there are input fields for various categories: Black (50), Hispanic (0), Asian American (0), American Indian (0), Female (0), Disabled Owned (0), Disabled Business Enterprise (0), Non-Profit Work Center (0), and Socially and Economically Disadvantaged (0).
- Commodity Purchases(HUB & Non-HUB):** The total value is 0. Below this, there are input fields for the same categories as above, all currently set to 0.
- Service Purchases(HUB & Non-HUB):** The total value is 0. Below this, there are input fields for the same categories as above, all currently set to 0.

At the bottom of the form, there are "Next -->" and "Cancel" buttons.

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Please double check the Quarter at the top of the screen to make sure the correct quarter's report is being displayed. It will be possible for users of the system to go back and edit previous reports. Make sure to enter 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 (default of the HUB fields is \$0 so you only need to enter data in HUB categories where spending occurred):
 - Black
 - Hispanic
 - Asian American
 - American Indian
 - Female
 - Disabled Owned
 - Disabled Business Enterprise
 - Not-Profit Work Center
 - Socially and Economically Disadvantaged
- Negative values:
 - The IPS HUB Reporting System is not set up to accept negative values in the Totals, though it may be a valid reflection of spend. If negative values need to be entered for Totals for Term Contract, Commodity Purchases or Service Purchases please e-mail the HUB Office at doa.hub.reporting@doa.nc.gov to request assistance. We will need to know the correct values to enter into the IPS HUB Reporting system and the requesting agency's authorization for the DOA IT Solutions team to enter the data and approve it on behalf of the agency.
 - It is possible to enter negative numbers in all HUB 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 should be invoices paid on purchase orders, direct payments 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. Subcontract spending needs to be entered under the HUB category of the company.

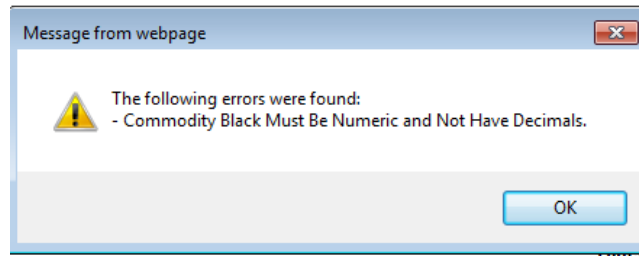
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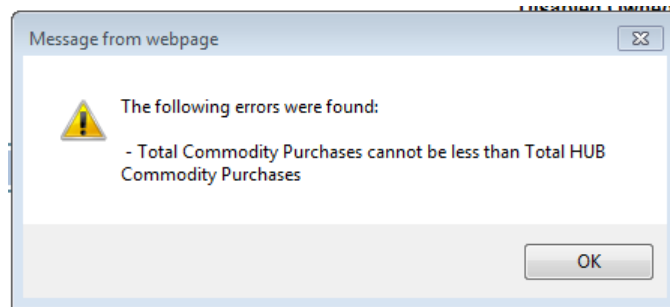
- If you are uncertain what the HUB Category for a vendor is please check the HUB vendor search page at: <https://www.ips.state.nc.us/vendor/searchvendor.aspx?t=h>.

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 (example: 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.*
- **Cancel** – Clicking Cancel takes you back out to the Quarterly HUB Procurement Reporting screen. The data you already entered will be saved.

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- You could do this if your role is to enter data but not approve the report, 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	
Total All Purchases(HUB & Non-HUB)	\$17,500	%
Term Contract Purchases(HUB & Non-HUB)	\$1,500	8.57%
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%
Term Contract Purchases(HUB)	\$650	3.71%
Commodity Purchases(HUB & Non-HUB)	\$16,000	91.43%
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%
Commodity Purchases(HUB)	\$8,965	51.23%
Service Purchases(HUB & Non-HUB)	\$0	0.00%
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%
Service Purchases(HUB)	\$0	0.00%
<-- Back	Approve	Cancel

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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 by e-mail at doa.hub.reporting@doa.nc.gov or by calling the HUB Office main number (984-236-0130) and sharing with the person who answers the phone that you have questions about goods and services reporting. 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.