

# DGS NCB Portal User Manual for Departmental Approvers

The NCB Portal is a software tool provided by the California Department of General Services (DGS) to departments and agencies across California state government.

This manual is for use by management personnel in departments and agencies, who have authority to give their organization's approval to submit non-competitive bid requests to DGS for final approval.



## Introduction

A Non-Competitive Bid (NCB) is limited by statute in accordance with Public Contract Code sections 12102, 10301/10302, and 10340 for information technology (IT) and non-IT goods and services.

Special Category Requests (SCR) and Limited-to-Brand (LTB) requests are also forms of limited competition. The NCB Portal is used for all 3 types.

This instruction manual is intended for departmental requestors who wish to submit an NCB request to the Department of General Services (DGS).

DGS has developed the NCB Portal for several purposes:

- To assist departments and agencies in completing and submitting NCBs, SCRs, and LTB requests.
- To provide guidance to departments and agencies toward ensuring that their requests comply with state policy.
- To provide a modern, online submission method that's more convenient for requestors and DGS, compared to past paper-based methods.
- To provide better visibility and tracking for departments and agencies to see the status of their requests.

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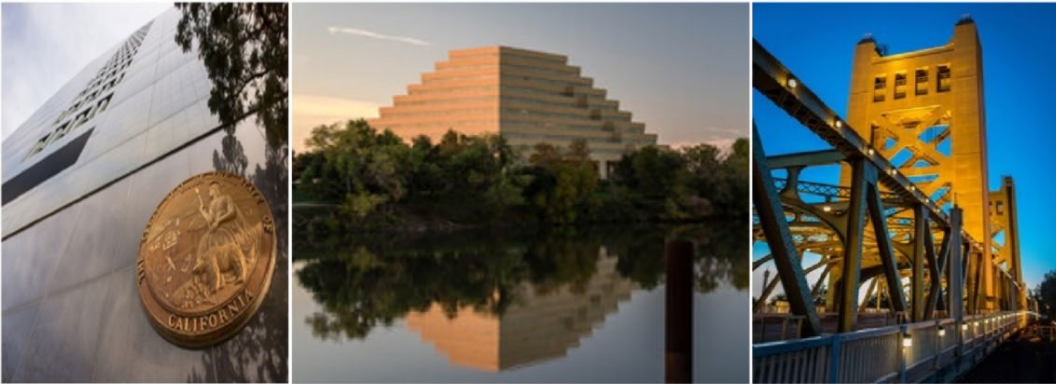
## GLOSSARY

- **Approver:** An approver is a type of user ID in the NCB Portal. Users of this type have authority to give initial approval on behalf of your department or agency to submit an NCB to DGS for final approval. Only DGS has the authority to give final approval of an NCB request. This manual is for use by Approvers in your department or agency.
  - To revise the PCO and/or other approvers, Departments must submit a revised Purchasing Authority Approval Letter (PAAL) and Signature Authority Designation (SAD) form.
  - A new SAD Form needs to be completed and returned with a copy of your current organization chart so that DGS can update the current staff assignment within the Portal. For details as to who may be authorized to sign for the Department, review State Contracting Manual Volume 2, Chapter 15, Section 1503 Signature Authority.

- **Reminder:** Individuals listed on the SAD form and in the PAAL are required to be registered in the Portal for this process to be completed (instructions below). The forms are attached for convenience.
- **Requestor:** A requestor is a type of user ID in the NCB Portal. A requestor enters the details of the NCB request, and routes it to the Approver(s) with the department or agency. A separate manual is available from DGS for use by Requestors in your department or agency.

## HOW TO REGISTER

1. To submit an NCB request to DGS, you will need to register and receive an account on the NCB Portal. To register, navigate to <https://dgs.service-now.com/ncb> and select “Request NCB Access” on the login page:



Login


User name

Password

Remember me

[Forgot Password](#)

**Login**



**Request NCB Access**

Trouble signing in? You can send an email to [PDNCB@dgs.ca.gov](mailto:PDNCB@dgs.ca.gov), from your state-issued email address; in your message, request a password reset.

DGS staff must click here to log in

2. Fill out all the required fields and click “Order Now”.

Your request will be submitted to your department or agency's Procurement and Contracting Officer (PCO) for approval.

3. Once your PCO approves your request, you will be sent an email with your username and temporary password. Note: The username is your email address.
4. Return to the DGS NCB login screen <https://dgs.service-now.com/ncb> and create a permanent password.
5. Now that your ID is fully set up, you may wish to save the link to the NCB Portal in your favorites or desktop for convenience: <https://dgs.service-now.com/ncb>.

## **FOR PCOS ONLY: HOW TO BE DESIGNATED AS THE PCO WITHIN THE NCB PORTAL**

Each department or agency has a Purchasing and Contracting Officer (PCO). If you are the PCO for your entity, email [PDNCB@dgs.ca.gov](mailto:PDNCB@dgs.ca.gov) with appropriate documentation. DGS will designate your ID as the PCO within the NCB Portal.

## **FOR PCOS ONLY: HOW TO APPROVE A NEW USER TO USE THE NCB PORTAL WITHIN YOUR ORGANIZATION**

Each PCO has the authority to approve new user IDs for their department or agency. If you are the PCO, you'll receive an email when someone follows the steps in **How to Register** (above) to request a user ID with your department or agency. You can either approve or reject their request for a user ID.

1. Click on the link in the email.
2. You'll see this screen:

Home > Approval Form

This Requested Item requires your approval

State  
Requested

Created  
29m ago

Approval request for Requested Item RITM0062690

[RITM0062690](#)

Request NCB Access  
Opened by Guest User  
Quantity 1

Options

First Name  
Alice  
Business Phone

This is asking for your approval for the person to be given access to the NCB Portal for your department or agency. If you have already decided whether to approve or reject, you can skip to step 4.

3. You can see more details about the request by clicking the link that starts with RITM:

Home > Approval Form

This Requested Item requires your approval

State  
Requested

Created  
23m ago


Approval request for Requested Item RITM0062690

[RITM0062690](#)

Request NCB Access  
Opened by Guest User  
Quantity 1

Options

First Name  
Alice  
Business Phone

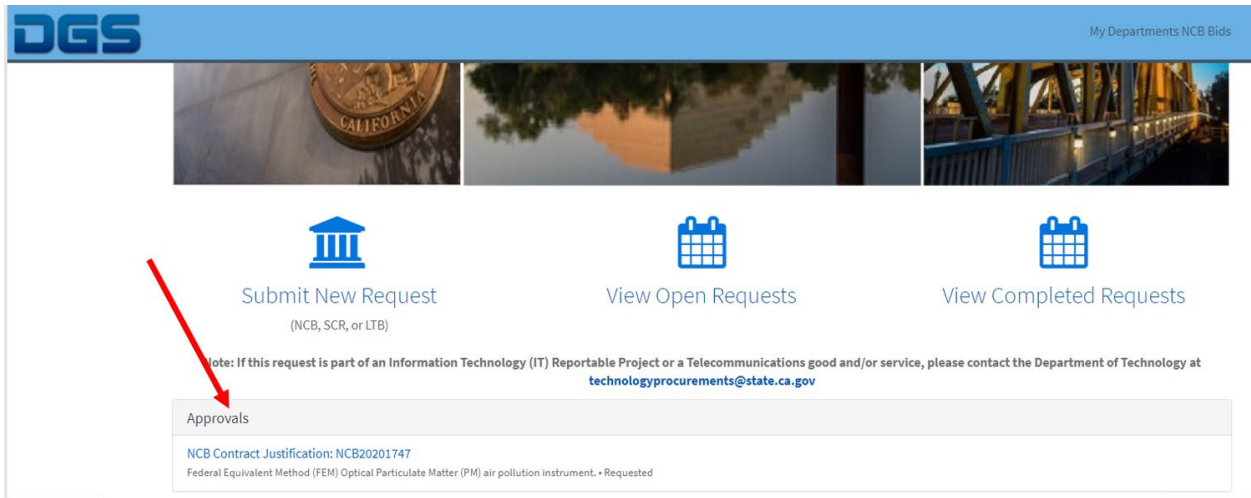


4. If you click Approve, the person who requested access will automatically be sent an email with a username and a temporary password.
5. If you click Reject, the request will be marked as rejected and the person who requested access will not be granted access to the NCB Portal.

## **RECEIVING AN NCB REQUEST**

1. Once a requestor in your department/agency has finished entering an NCB, a notification email will be sent to the PCO (and other approvers for that department/agency) requesting their initial approval before submitting it to DGS.

2. Open the email notification and click the link. Log into the NCB portal. This will take you to the request page in the portal, and you can skip step 3 and go straight to **Reviewing an NCB Request**, below.
3. Even without using the email, you can still access the NCB request. To do this, log into the NCB portal at <https://dgs.service-now.com/ncb>. Once you're logged in, any NCBs that are pending your approval will be shown at the bottom of the main screen:



Click on the link to see the NCB of interest. Clicking the link will **not** by itself affect the NCB at all; you will still have the opportunity to approve or reject the NCB.

## **REVIEWING AN NCB REQUEST**

You can either approve the NCB request to be sent to DGS for final approval, or you can reject it so that it won't be sent to DGS.

1. You should now see this screen, where you, as the approver, can review basic information about the specific NCB. You can choose to approve or reject it now, or view more details about it.



Attachments and comments that have been entered on that request are available directly from this screen.

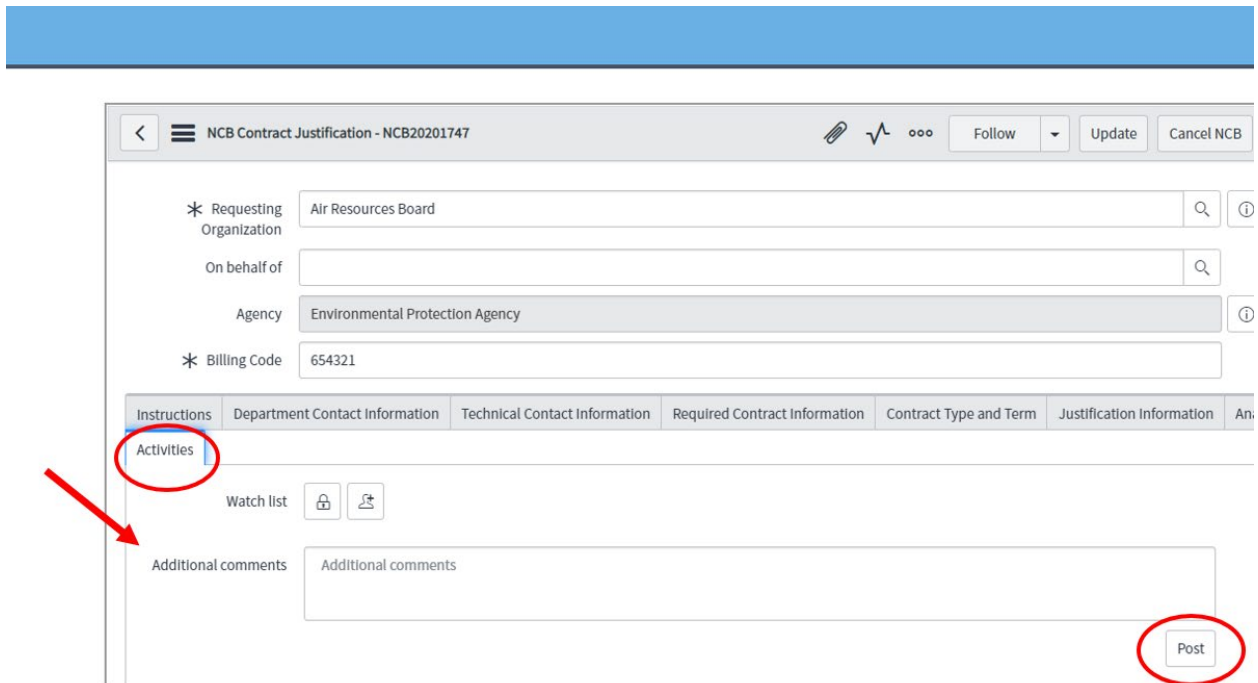
In addition, you can see the complete details about the NCB by clicking the link near the top, “Click HERE to view the referenced NCB Record.” Then navigate back to the screen shown above, either by using the back button on the browser or clicking the link in your email.

## **APPROVING AN NCB REQUEST TO BE SENT TO DGS FOR FINAL APPROVAL**

1. Choose the Approve or Reject button. A rejection of an NCB will require you to provide a reason(s) for future reference, in the comment section. An approval will send the request on to DGS, if all other required approvers within your department/agency have approved.

## **SENDING COMMENTS TO DGS ABOUT AN NCB REQUEST**

1. To provide comments on an NCB, navigate to the “Activities” tab. Enter a comment in the “Additional comments” field box.



The screenshot displays the 'NCB Contract Justification - NCB20201747' interface. At the top, there are navigation icons and buttons for 'Follow', 'Update', and 'Cancel NCB'. Below this, there are several input fields: 'Requesting Organization' (Air Resources Board), 'On behalf of', 'Agency' (Environmental Protection Agency), and 'Billing Code' (654321). A horizontal menu below these fields includes 'Instructions', 'Department Contact Information', 'Technical Contact Information', 'Required Contract Information', 'Contract Type and Term', 'Justification Information', and 'Activities'. The 'Activities' tab is highlighted with a red circle, and a red arrow points to it from the left. Below the menu, there is a 'Watch list' section with lock and user icons. The main area contains an 'Additional comments' text box. A 'Post' button is located at the bottom right of the text box, also circled in red.

Be sure to save the comments by clicking on the “post” button. Your comment will be visible to DGS.

## **MONITORING PROGRESS AND RECEIVING DGS’ DECISION ON YOUR NCB**

An automatic email notification will be sent to the PCO and Requestor when DGS’ decision has been made.

All requestors and approvers in your department or agency can monitor your request through every step of the process.

1. DGS' decision has not been issued until you see **Completed** in the State field:

The screenshot shows the 'CB Contract Justification - NCB20191522 [NCB Form view\*]' interface. At the top, there are utility icons and buttons for 'Follow', 'Update', 'Cancel NCB', and 'Copy NCB'. Below this is a process flow bar with steps: 'Dept / Agency Approval' (checked), 'Intake at DGS' (checked), 'Assignment' (checked), 'In Analysis at DGS' (checked), 'Under Mgmt Review at DGS' (checked), and 'Pending Closeout at DGS' (checked). Underneath the flow bar, the 'Number' field contains 'NCB20191522' and the 'Justification Type' field contains 'NCB'. To the right, the 'State' field is set to 'Completed', with a red arrow pointing to it.

2. If you see **Completed** in the State field, click on the Closeout tab:

The screenshot shows a navigation menu with four tabs: 'Information', 'Analysis', 'Closeout', and 'Activities'. The 'Closeout' tab is currently selected and highlighted with a blue border.

3. The decision will be shown in the Final Approval field:

The screenshot shows the 'Final Approval' field with the value 'Approved'. Below it, the 'Conditions' field shows '-- None --'. The 'Approval / Denial Comments' field is empty. At the bottom, the 'Closed' field shows the date and time '2020-07-28 03:45:48 PM'.