

Advanced Purchasing

Introduction

This process guide provides instruction on the functional steps to manage a Purchase Requisition (PR) in both Guided Buying and the Expert View of NC eProcurement once its been created. Please refer to the two **Creating Purchase Requisitions** guides for detailed instruction on the creation process.



Learning Objectives

At the end of this job aid, **you will be able to:**



Understand the NC eProcurement purchasing lifecycle.



Manage requisitions in composing status.



Withdraw a requisition in submitted status.

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NC eProcurement Purchasing Lifecycle

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- A. In the beginning of the NC eProcurement purchasing lifecycle, a Purchase Requisition (PR) is created by the requester and has a status of **Composing**.
- B. Once the information for the PR has been entered, it is **Submitted** for approval.
- C. A designated approver(s) reviews the PR. If approval is granted, the PR status changes to **Approved** and the PR is sent to the backend financial system for funds checking and further processing.



If the PR is denied rather than approved, the status changes to **Denied**.

- D. The Purchase Request/Purchase Order must be processed in the specific backend system used by the EPLite entity. Once complete, the Purchase Order is automatically transmitted back into NC eProcurement and is electronically transmitted to the supplier. The purchase order now has a status of **Ordered**.



Once a PO is created and reaches the status of **Ordered**, a field on the **Summary** tab called **Order Confirmation Status** will be populated. Vendors have the option to update the buyer on the status of an order through their Ariba Network account. One of the following four statuses will be displayed:

- **Unconfirmed:** This is the initial status for every PO and is very common. It indicates that the vendor has not confirmed they have received this PO through their Ariba Network account. Many vendors choose to receive their POs outside of the Ariba Network or opt not to provide this confirmation. This does not mean that the vendor has not received the PO.
- **Confirmed:** The vendor has indicated that they have received this PO through their Ariba Network account.
- **Shipped:** The vendor has indicated that they have shipped the item(s) to the buyer through their Ariba Network account. Since it is optional, vendors can ship item(s) without updating this field via their Ariba Network account.
- **Rejected:** The vendor has indicated that they received the PO but do not wish to fill the order. If this is the case, please reach out to the vendor for further discussion.

Managing Purchase Requisitions in Composing Status

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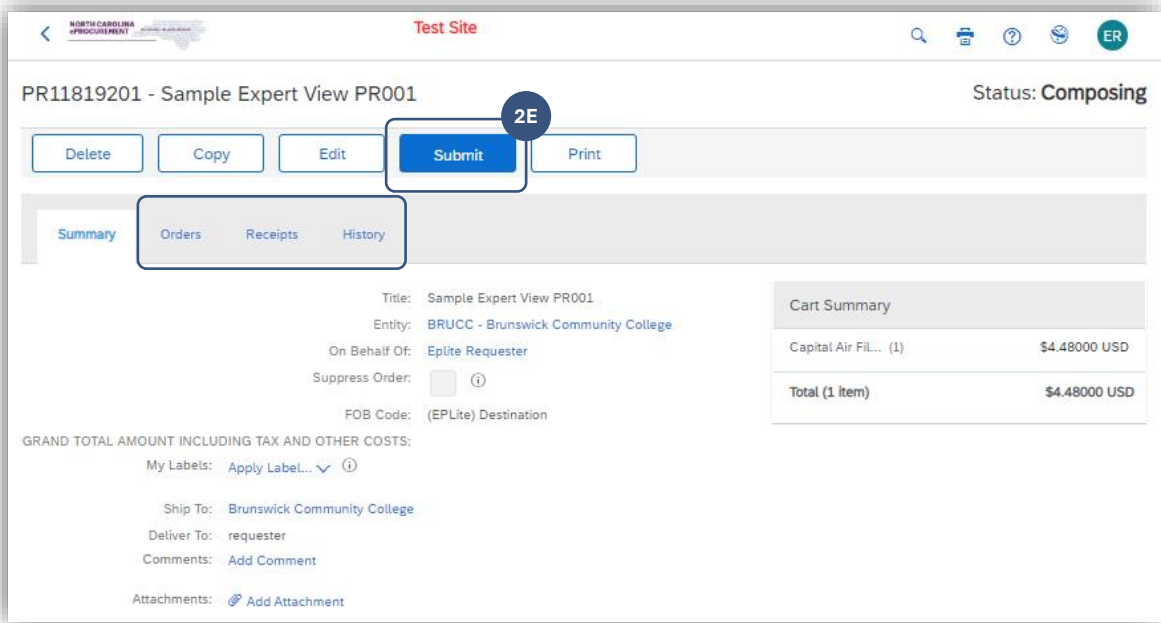
Expert View:

In Expert View a Purchase Request (PR) is created in **Composing** status once a user clicks the **Requisition** link on the **Procurement** tab or an item(s) has been added to the **Shopping Cart** on the **Catalog** tab regardless of whether or not the user has proceeded to the **Checkout** page for the item. If the user clicks the **Requisition** link while there are still items in the **Shopping Cart** from a previous search, those previous items will be pushed out of the Shopping Cart into their **Composing** PR, and a new PR will be established into which the user can shop for other items.

- A. Click on the **ID** or **Title** of the selected PR in the **My Documents** portlet. The user will see five options at the top of the PR along with three new tabs besides the **Summary** tab.
- B. **Delete:** Removes the PR and all of its contents from the system.
- C. **Copy:** Creates a new PR containing the same line items with a default **Title** of “**Copy of ...**” The user can make the requisite edits and **Submit** that order or add to it by clicking the **Continue Shopping** button on the **Summary** Page.
- D. **Edit:** Unlocks the PR for the user to make any changes or additions before ultimately clicking **Submit**.

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- E. Submit:** Sends the PR to be approved by the approval flow. If the PR is not yet ready to be submitted, error messages will display guiding the user to the fields that need attention.
- F. Print:** Generates the print summary of the **Composing** PR.
- G.** The **Orders** tab will be empty at this point until the PR is fully approved and has turned into a Purchase Order.
- H.** The **Receipts** tab will be empty at this point until the PR is fully approved and has turned into a Purchase Order.
- I.** The **History** tab will record a summary of major actions throughout the purchasing lifecycle, such as edits and approvals.



Guided Buying:

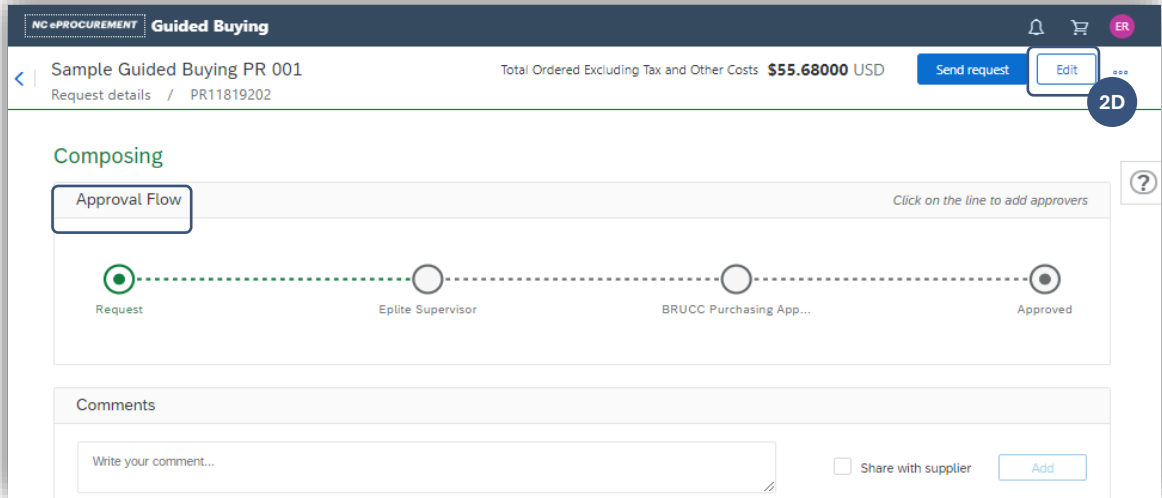
There is no formal initiator of a PR in Guided Buying. As soon as the user puts an item in their **Shopping Cart**, a PR is created in **Composing** status, although it is not apparent until the user either proceeds to the **Checkout** page or navigates to Expert View, where the PR will be recorded in the **My Documents** portal. Once the user clicks **Proceed to Checkout**, the PR will show up in both the **Recent requests** section on the main page as well as on the **Your Requests** tab of Guided Buying.

There is no way within Guided Buying to start a new PR while items not intended for that new PR are already in the **Shopping Cart** without first taking the existing items to the **Checkout** page. If the user adds new items to an existing **Shopping Cart**, all items will be added to the same PR once the user proceeds to the **Checkout** page. The user should click either **Delete** or **Checkout** in the **Shopping Cart** with the existing items before searching for new items on a new PR, or navigate to Expert View where this situation can be managed better.

- A.** Click on the **Composing** PR within **Recent requests** or on the **Your Requests** tab.
- B.** The **Request details** page will display with the **Approval Flow** visible at the top of the page above **Comments**, **Attachments**, and the contents of the PR. The user will have three options to choose from at the top of the page.
- C.** Send Request: Sends the PR to be approved by the approval flow. If the PR is not yet ready to be submitted, error messages will display guiding the user to the fields that need attention.

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- D. **Edit:** Unlocks the PR for the user to make any changes or additions before ultimately clicking **Submit**.
- E. Clicking the three dots to the right of **Edit** will allow the user to either **Buy again** or **Delete**. **Buy again** will copy the PR, and **Delete** will remove it from the system.



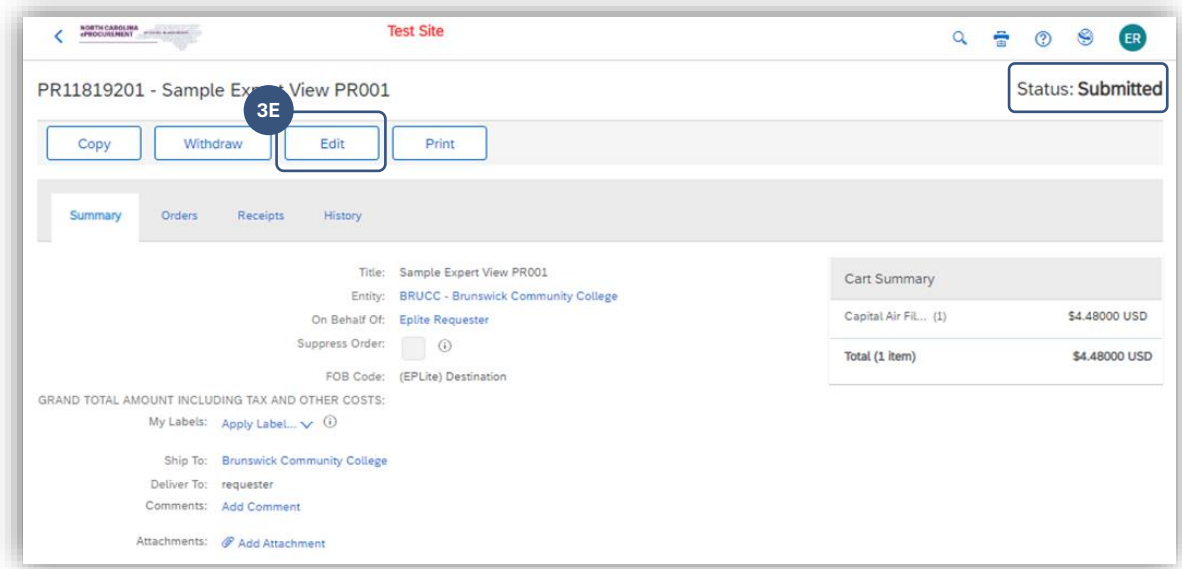
Withdrawing Purchase Requisitions in Submitted Status

- 3 Original requesters can withdraw a Purchase Requisition (PR) in **Submitted** status to make edits **before** it is fully approved. When a PR is withdrawn, the status of the PR changes from **Submitted** back to **Composing**.

Expert View:

- A. In Expert View click on the **ID** or **Title** of the selected PR in the **My Documents** portal. The user will see four options at the top of the PR along with three new tabs besides the **Summary** tab.
- B. **Copy:** Creates a new PR containing the same line items with a default **Title** of "Copy of ...". The user can make the requisite edits and **Submit** that order or add to it by clicking the **Continue Shopping** button on the **Summary** Page.
- C. **Withdraw:** Directs the user to the **Request Withdrawn** page where the user can **Edit** or **View** the PR, or return to the **Procurement** tab and take action later on the now **Composing** PR.
- D. **Edit:** Withdraws the PR and takes the user directly to the **Summary** tab to make changes. The status is not shown on the screen, but the PR will now be **Composing** until it is re-submitted.
- E. **Print:** Generates the print summary of the **Submitted** PR.

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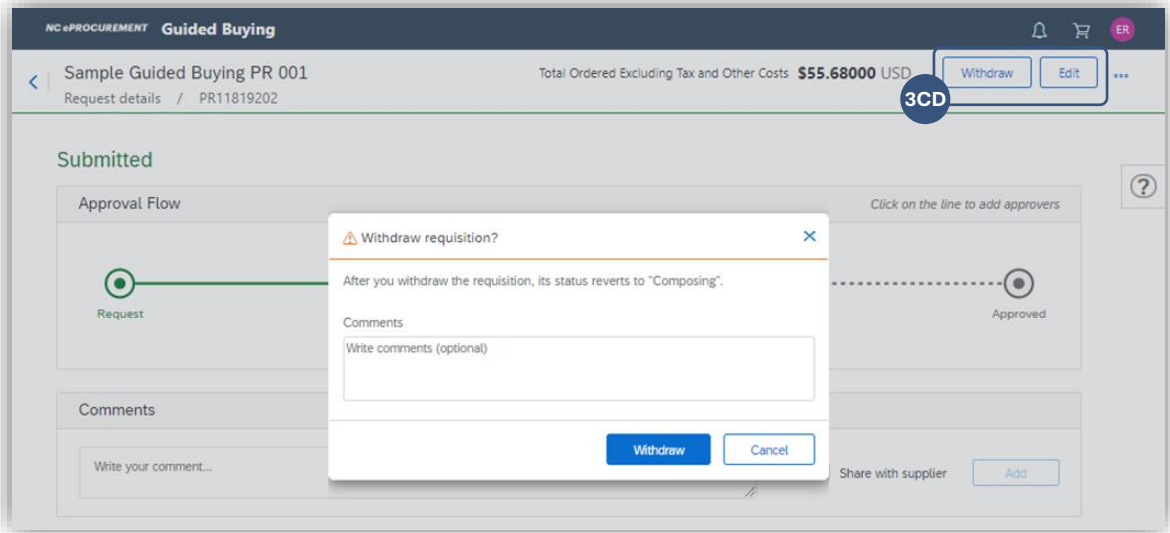


Any individuals in the Approval Flow who approved the PR prior to it being withdrawn will be required to review and approve the modified PR again. Additionally, approval flows may change based on changes that were made to the PR. This retriggering of the Approval Flow exists in both Guided Buying and Expert View.

Guided Buying:

- A. In Guided Buying Click on the **Submitted** PR within **Recent requests** or on the **Your Requests** tab.
- B. The **Request details** page will display with the **Approval Flow** visible at the top of the page above **Comments, Attachments**, and the contents of the PR. The user will have three options to choose from at the top of the page.
- C. **Withdraw:** Directs the user to the **Withdraw requisition?** pop-up where they can confirm their withdrawal request by clicking the **Withdraw** button or leave it in **Submitted** status by clicking **Cancel**. There is space for optional comments if the user would like to include one with their decision to click **Withdraw**. The user will be returned to the home page and the PR will now be in **Composing** status and can be accessed for editing.
- D. **Edit:** Directs the user to the **Edit requisition?** pop-up where they can confirm their withdrawal request by clicking the **Edit** button or leave it in **Submitted** status by clicking **Cancel**. There is space for optional comments if the user would like to include one with their decision to click **Edit**. The user will be taken to the **Checkout** page for the PR and can begin editing right away.
- E. Clicking the three dots to the right of **Edit** will allow the user to either **Buy again** or **Delete**. **Buy again** will copy the PR, and **Delete** will remove it from the system.

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Fully Approved Purchase Requisitions

- Once the final approver approves a Purchase Requisition (PR), the status of the PR is updated from **Submitted** to **Approved**. At this point, the PR is sent to the backend financial system for funds checking and further processing.

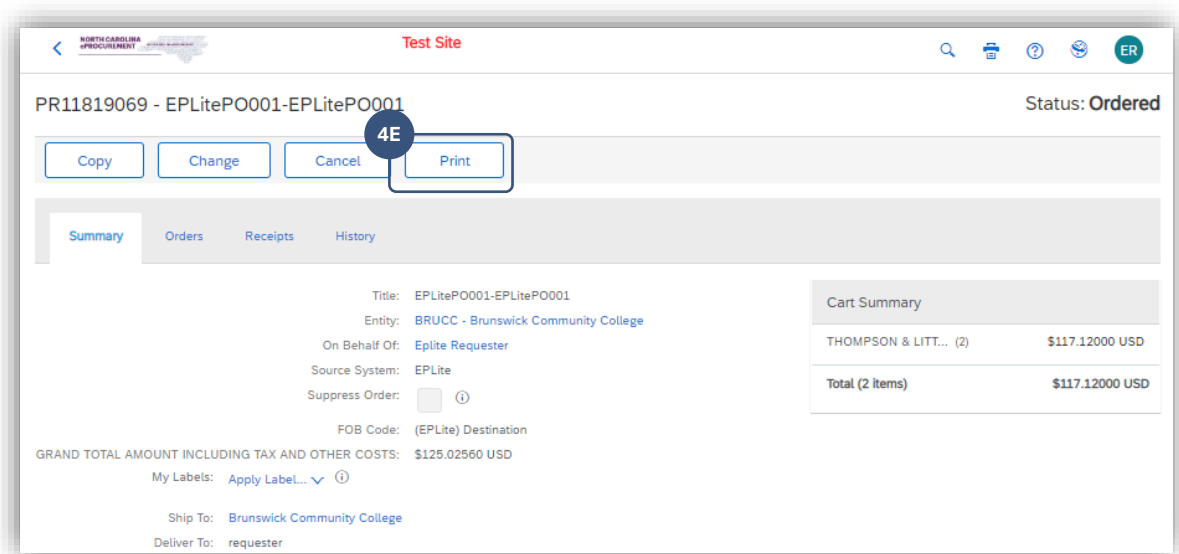
Expert View:

In Expert View, once that PR comes back as a fully-approved Purchase Order (PO) from the financial system, the status of that PR will change to **Ordered**, and the **Title** will update to be appended with the Purchase Order (PO) #, which is generated by the entity's financial system.



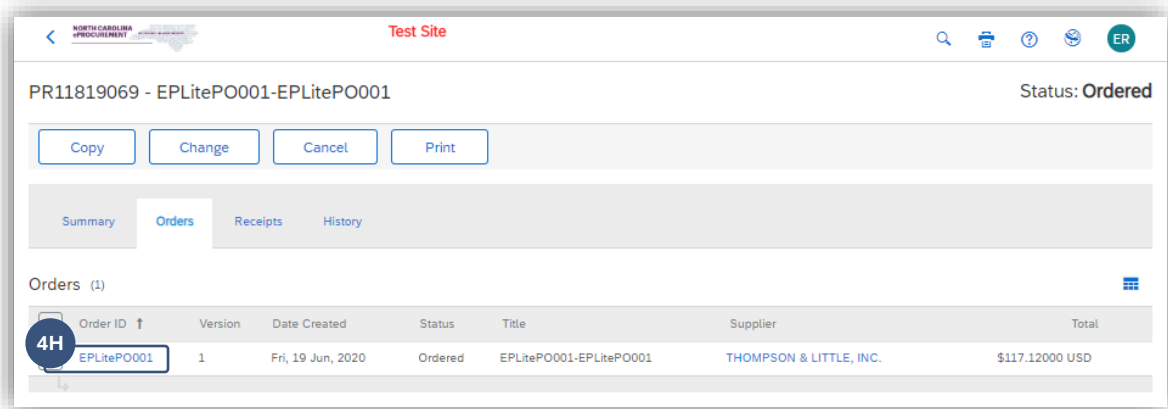
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- A. Clicking on the **ID** or **Title** of the **Ordered** PR in the **My Documents** portal will display four options at the top of the PR along with three tabs besides the **Summary** tab.
- B. **Copy**: Creates a new PR containing the same line items with a default **Title** of “Copy of ...” The user can make the requisite edits and **Submit** that order or add to it by clicking the **Continue Shopping** button on the Summary Page.
- C. **Change**: Do NOT click this button. All changes must be made in the entity's financial system.
- D. **Cancel**: Do NOT click this button. All cancellations must be made in the entity's financial system.
- E. **Print**: Generates the print summary of the **Ordered** PR. This will include complete cost information including **Tax Amount** and **Other Costs** that were not visible before the order returned from the financial system as a PO.
- F. Near the top of the **Summary** tab, the **GRAND TOTAL AMOUNT INCLUDING TAX AND OTHER COSTS** field will now be populated with the grand total the entity will owe the vendor. This field was not populated before the order returned from the financial system as a PO.
- G. Further down the **Summary** page in the **Line Items** section, the user can click on the **Detail** button next to a specific line item to see the **Tax Amount** and **Other Costs** applied to just that line item as those fields were not populated before the order returned from the financial system as a PO.

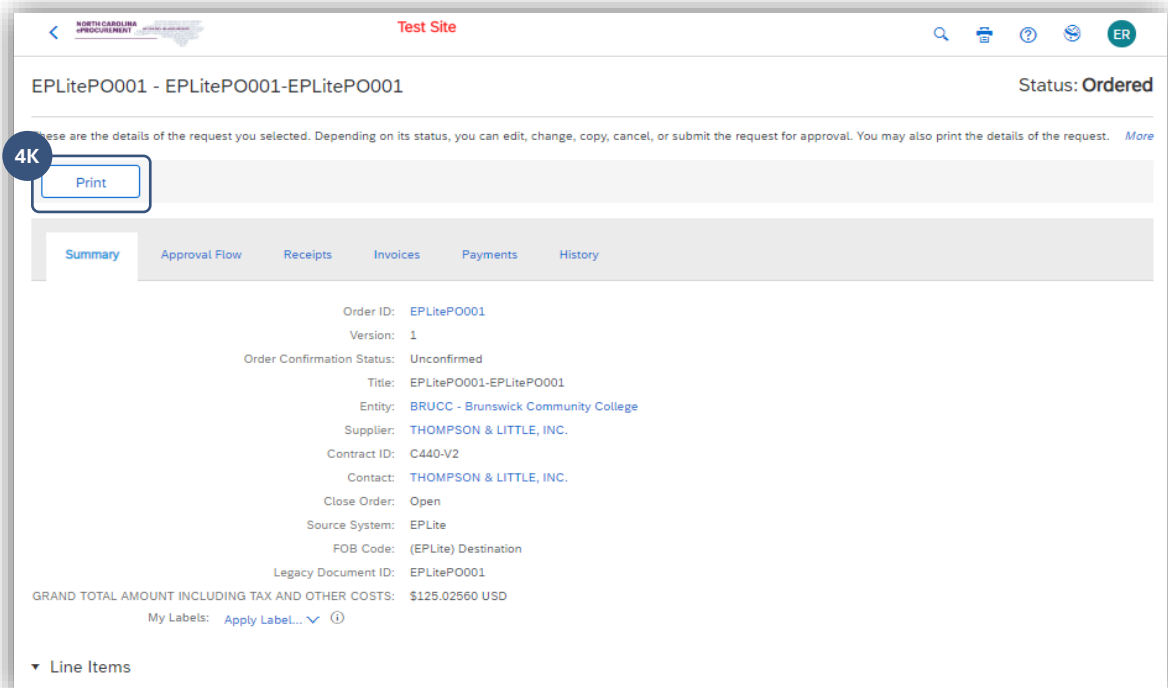


- H. Back at the top of the page on the **Orders** tab, the user will find a link to the PO that can be accessed by clicking on the **Order ID** that begins with **EP**.
- I. The **Receipts** tab can be ignored as receiving is not done within NC eProcurement for EPLite users.
- J. The **History** tab will record a summary of major actions throughout the purchasing lifecycle, most notably the date and time the PR went to **Ordered** status and was sent to the vendor.

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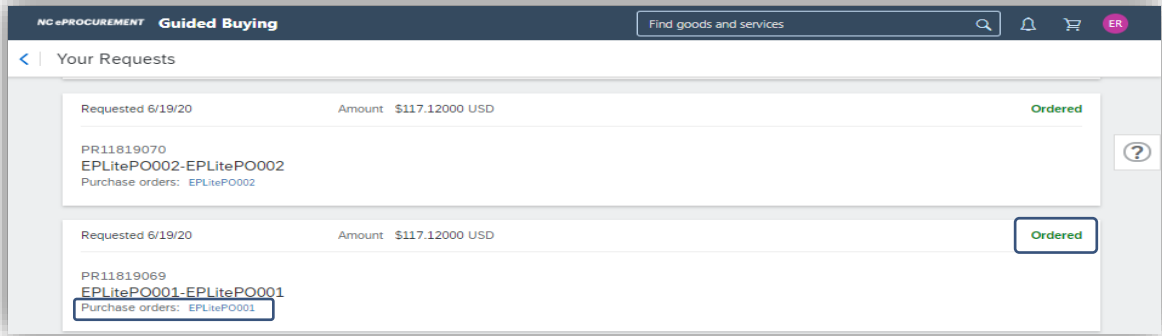
- K. Clicking on the PO **Order ID** will take the user to the PO where they will have the option to **Print** at the top of the page.
- L. The user will see six tabs on the PO page, starting with the default **Summary** tab.
- M. The **Approval Flow** tab can be ignored, as all approvals are done at the PR level.
- N. The **Receipts** tab can be ignored as receiving is not done within NC eProcurement for EPLite users.
- O. The user should ignore the **Invoices** and **Payments** tabs. They will not be used in NC eProcurement, but cannot be hidden.
- P. The **History** tab will record a summary of major actions of just the PO, not what occurred to the PR on the way to becoming the PO.
- Q. Near the top of the **Summary** tab, the **GRAND TOTAL AMOUNT INCLUDING TAX AND OTHER COSTS** field will now be populated with the grand total the entity will owe the vendor. This field was not populated before the order returned from the financial system as a PO.
- R. Further down the **Summary** tab below the order information and the **Line Items** and **Payment Terms** sections, there is a **Conditions of Purchase** section that contains a link to the **Terms and Conditions of Purchase** that will print on the PO that the vendor must agree to.



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Guided Buying:

In Guided Buying, the status of the PR is updated from **Submitted** to **Ordered** and can be found in either the **Recent requests** section or the **Your Requests** tab. On the **Your Requests** tab, a link to the Expert View version of the PO will display in the bottom-left of the PR.



- In Guided Buying, click on the **Ordered** PR within **Recent requests** or on the **Your Requests** tab.
- The **Request details** page will display, and the user will have three options to choose from at the top of the page.
- Change request:** Do NOT click this button. All changes must be made in the entity's financial system.
- Cancel request:** Do NOT click this button. All cancellations must be made in the entity's financial system.
- Clicking the three dots to the right of **Cancel request** will allow the user to either **Buy again** which will create a copy of the PR.
- The PO# will display as a link on the right side of the PR above the line items. This will take the user to the Expert View version of the PO.

