NC eProcurement Advanced Purchasing

STATE DEPARTMENT STATE BRANCI. LOCAL GOVERNMENT CITY COUNTY COMMUNITY COLLEGE PUBLIC SCHOOLS I NORTH CAROLINA ePROCUREMENT PURCHASS ONLINE SHOPPING STATEWIDE TERM CONTRACTS ELECTRONIC VENDOR PORTAL HUB CERTIFIED V JUOTE PUNCHOUT CATALSG SOURCING BUY

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

I. NC eProcurement Purchasing Lifecycle

- 1. In the beginning of the NC eProcurement purchasing lifecycle, a Requisition (RQ) is created by the requester and has a status of **'Composing.'**
- 2. Once the information for the RQ has been entered, it is '**Submitted**' for approval and budget check.
- 3. If the budget check is unsuccessful, a warning message will appear. Users can choose to return the requisition to **'Composing'** status and make corrections or can proceed with submission by again clicking the **'Submit'** button. Unsuccessful budget checks will not prevent requisition submission, subsequent approvals or PO creation.
- 4. A designated approver(s) reviews the RQ. If approval is granted, the RQ is sent to NCFS to encumber the funds. A Purchase Order is then generated in NC eProcurement and the status is updated to **'Ordered.'**
- 5. The Purchase Order is electronically transmitted to the supplier using the ordering email address entered by the vendor in their electronic Vendor Portal account, or via the Ariba Supplier Network.
- 6. If the Purchase Order needs to be edited after it has been updated to **'Ordered'** status, users may create a change order by clicking the **'Change'** button in the Purchase Order summary.
- 7. Once the items have been physically received, the Purchase Order is ready to be received by the user in NC eProcurement. This begins the 'Receiving' phase of the NC eProcurement purchasing lifecycle. Once all line items in the order have been verified and accepted, the order completes the NC eProcurement purchasing lifecycle with a status of 'Received.'

II. Managing Requisitions in Composing Status

a. Expert View

In Expert View a Requisition (RQ) 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'** RQ, and a new RQ will be established into which the user can shop for other items.

- 1. Click on the 'ID' or 'Title' of the selected RQ in the 'My Documents' portlet. The user will see five options at the top of the RQ along with three new tabs besides the 'Summary' tab.
- 2. Delete: Removes the RQ and all of its contents from the system.

- 3. **Copy:** Creates a new RQ 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.
- 4. Edit: Unlocks the RQ for the user to make any changes or additions before ultimately clicking 'Submit.'
- 5. **Submit:** Sends the RQ to be approved by the approval flow. If the RQ is not yet ready to be submitted, error messages will display guiding the user to the fields that need attention.
- 6. Print: Generates the print summary of the 'Composing' RQ.
- 7. The '**Orders**' tab will be empty at this point until the RQ is fully approved and has turned into a Purchase Order.
- 8. The '**Receipts**' tab will be empty at this point until the RQ is fully approved and has turned into a Purchase Order.
- 9. The '**History**' tab will record a summary of major actions throughout the purchasing lifecycle, such as edits and approvals.

		Q	🖶 🖗 🛞 🖻
RQ162766 - Sample Expert View PR			Status: Composing
Delete Copy Edit Submit Print			
Summary Orders Receipts History	Click ' Edit' to unlock the RQ and complete		
Title: Sample Expert View PR Need-by Date: (i)	the purchase.	Cart Summary	
Entity: 13 - Department of Administration	Note the three new tabs	THOMPSON & LITT (2)	\$117.12000 USD
On Behalf Of: ADMIN Requester	displayed next to the	Total (2 items)	\$117.12000 USD
Suppress Order: (i)	'Summary' tab.		
My Labels: Apply Label V (i)	,		
Ship To: 13PT			
Deliver To: ADMIN Requester			
Need-by Date: (j)			
Comments: Add Comment			

b. Guided Buying

There is no formal initiator of an RQ in Guided Buying. As soon as the user puts an item in their 'Shopping Cart,' an RQ 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 RQ will be recorded in the 'My Documents' portal. Once the user clicks 'Proceed to Checkout,' the RQ 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 RQ while items not intended for that new RQ 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 RQ 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 RQ, or navigate to Expert View where this situation can be managed better.

- 1. Click on the 'Composing' RQ within 'Recent requests' or on the 'Your Requests' tab.
- 2. 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 RQ. The user will have three options to choose from at the top of the page.
- 3. **Submit:** Sends the RQ to be approved by the approval flow. If the RQ is not yet ready to be submitted, error messages will display guiding the user to the fields that need attention.
- 4. Edit: Unlocks the RQ for the user to make any changes or additions before ultimately clicking 'Submit.'
- 5. Clicking the three dots to the right of 'Edit' will allow the user to either 'Buy again' or 'Delete.' 'Buy again' will copy the RQ, and 'Delete' will remove it from the system.

NC & PROCUREMENT Guided Buying		ර ² 늄 💊
Test NCFS 1 Request details / RQ99747-V2		Total Cost \$10.00000 USD
	Click 'Edit' to unlock the RQ and complete the purchase.	
Approval Flow	Note the 'Approval Flow' displays at the top of page.	Click on the line to add approvers
•		®
Request ADMIN Supervis	or ADMN Budget Approver	ADMN Chief Procureme Approved
History		

III. Withdrawing Requisitions in Submitted Status

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

a. Expert View

- 1. In Expert View click on the 'ID' or 'Title' of the selected RQ in the 'My Documents' portal. The user will see four options at the top of the RQ along with three new tabs besides the 'Summary' tab.
- Copy: Creates a new RQ 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.
- 3. Withdraw: Directs the user to the 'Request Withdrawn' page where the user can 'Edit' or 'View' the RQ, or return to the 'Procurement' tab and take action later on the now 'Composing' RQ.
- 4. Edit: Withdraws the RQ and takes the user directly to the 'Summary' tab to make changes. The status is not shown on the screen, but the RQ will now be 'Composing' until it is re-submitted.
- 5. Print: Generates the print summary of the 'Submitted' RQ.

				Q 🖶	0	S NR
RQ162766 - Samp	le Expert View			Ć	Status	: Submitted
Copy With	draw Edit Print					
Summary Orders	Receipts History	Click 'Withdraw' or 'Edit' to				
Title:	Sample Expert View	remove the RQ from the appr	roval			
Entity:	13 - Department of Administration	flow and unlock it to editing.	Jananay			
On Behalf Of:	ADMIN Supervisor		Air Fil (1)		\$5.45000 USD
Source System:	Ariba Guided Buying					
Suppress Order:	0		Total (1 item)			\$5.45000 USD
ERP Reference ID:	RQ162766					
Buying Entity:	13EG					
FOB Code:	(NCF5) 001 - Destination freight paid by vendor and Vendor files any claims.	d included in price. Title passes upon receipt.				
My Labels:	Apply Label 🗸 🛞					
Ship To:	437					
Deliver To:	requester					
Need-by Date:	0					

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

b. Guided Buying

- 1. In Guided Buying, click on the 'Submitted' RQ within 'Recent requests' or on the 'Your Requests' tab.
- 2. 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 RQ. The user will have three options to choose from at the top of the page.
- 3. 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 RQ will now be in 'Composing' status and can be accessed for editing.
- 4. 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 RQ and can begin editing right away.
- 5. Clicking the three dots to the right of 'Edit' will allow the user to either 'Buy again' or 'Delete.' 'Buy again' will copy the RQ, and 'Delete' will remove it from the system.

Sample Guided Buy Request details / RQ		6 Total Cost \$	요 및 N 137.08000 U2D Withdraw Edit
Submitted Approval Flow		Withdraw' or 'Edit' to remove the RQ ne approval flow and unlock it to editing.	Click on the line to add approvers
Request	NC Budget Integru	Withdraw requisition? After you withdraw the requisition, its status reverts to "Composing". Comments Write comments (optional)	ng Agen ADMN Chief Procureme.
Comments			
Write your comment		Wendraw Concel	Share with supplier Add

IV. Fully Approved Requisitions

Once the final approver approves a Requisition (RQ), the status of the RQ is updated from '**Submitted**' to '**Ordered**.'

a. Expert View

In Expert View, a separate Purchase Order (PO) beginning with **'NC'** is also generated and can be accessed from the RQ or directly from the **'My Documents'** portlet. Additionally, the first Receipt for the PO, beginning with **'RC**,' will also appear in both the **'My Documents'** and **'To Do'** portlets in **'Composing'** status.

ADETH CAROLINA APROCUREMENT							९ 🖶 🧿	۸ 😌
HOME PROCUREMENT	CATALOG 😕						Recent \vee Manage \vee	Create 🗸
teceipt 🗸 Title		ID	✓ Q					2
Common Actions	√ To Do							~
Create	ID	Date ↓	From	Status	Title		Required Action	
Requisition	RC18741		ADMIN Requester	Composing	7.13.2 retest PYT		Receive	
Receipt in	RC40442		ADMIN Requester	E Composing	7.13.8b req A PYT Retest		Receive	
Composing'	R0 572		ADMIN Requester	Composing	retest 7.13.4 reg b PYT		Receive	
tatus.	RC40444		ADMIN Requester	Composing	7.13.8b req C PYT Retest		Receive	
latuo.	RC39373		ADMIN Requester	Composing	Budget Check		Receive	
· · · · · · · · · · · · · · · · · · ·	× RC40428		ADMIN Requester	Composing	7.13.8b req A PYT Redo		Receive	
RQ162766 Samxpert View PR RC40353 Copy8b reg A PYT								View All
RQ63378 Copy8b req A PYT	My Doc	iments						~
RQ in	ID	anono.	Title			Date 4	Status	Ť
Composing'	RQ162	766	Sample Expert View PR			9/21/2023	Composing	
	R0162		test			9/21/2023	Composing	
status.	P RQ997	47-V2	Test NCFS 1			5/1/2023	Composing	>
	■ ■ RQ993	23	Check Budget Warning Error			4/6/2023	Composing	
	🗭 RQ992	86	5 catalogs			4/3/2023	Composing	
	🗐 RC687	03	7.13.8a reg D PYT			3/24/2023	Approved	
	E		7 49 69 69 6 897			2011/1022	C	

- 1. Clicking on the 'ID' or 'Title' of the 'Ordered' RQ in the 'My Documents' portal will display five options at the top of the RQ along with three tabs besides the 'Summary' tab.
- 2. **Copy:** Creates a new RQ 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.
- 3. **Change:** Click to initiate a change to the order. The specifics of this process are covered in a subsequent section.
- 4. **Cancel:** Click to initiate the cancellation to the order. The specifics of this process are covered in a subsequent section.
- 5. **Receive:** Click to begin the process of receiving against the order. The specifics of this process are covered in another process guide.
- 6. Print: Generates the print summary of the 'Ordered' RQ.
- 7. 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 'NC.'
- 8. The 'Receipts' tab will display the first upcoming receipt in 'Composing' status.
- 9. The '**History**' tab will record a summary of major actions throughout the purchasing lifecycle, most notably the date and time the RQ went to '**Ordered**' status and was sent to the vendor.

Approx.	Q 🖶 (୭_⊛_♠
RQ98854 - DHHS RQ C 3/13		Status: Ordered
Copy Change Cancel Receive Print	· · · ·	1
	The buttons at the top of the RQ will help further manage the PO.	
Sunnary Orders Paceipts History	On the 'Orders' tab of the RQ, click on the 'Order ID' to navigate	
Orders (1)	to the actual PO.	
Order TD T - Version Service Order Date Created		Total
NC517994 1 No Mon, 13 Mar, 2023	Ordered DHHS RQ C 3/13 Central Poly-Bag Corp. \$5.0000	000 USD

- 10. Clicking on the PO 'Order ID' from either the 'Orders' tab on the RQ or the 'My Documents' portlet will take the user to the PO where they will have two options: 'Receive' or 'Print' at the top of the page.
- 11. The user will see six tabs on the PO page, starting with the default 'Summary' tab.
- 12. The 'Approval Flow' tab can be ignored, as all approvals are done at the RQ level.
- 13. The 'Receipts' tab will display the first receipt in 'Composing' status.
- 14. The user should ignore the 'Invoices' and 'Payments' tabs. They will not be used in NC eProcurement, but cannot be hidden.
- 15. The **'History'** tab will record a summary of major actions of just the PO, not what occurred to the RQ on the way to becoming the PO.

16. On 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 '13 Terms and Conditions of Purchase' that will print on the PO that the vendor must agree to.

NC517994 - DHHS RQ C 3/13 These are the details of the request you selected. Depending on its status, you can edit, change, copy, cancel, or submit the request for	Status: Ordere
These are the details of the request you selected. Depending on its status, you can edit, change, copy, cancel, or submit the request for	
	pproval. You may also print the details of the request. Review your request and take the desired action(s).
Change Receive Print	
Summary Approval Flow Receips Invoices Payments History Order ID: NC517994 Version: 1	
Supplier Central Poly-Bag Corp. Supplier Location: CENTRAL POLY-BAG CORP. Close Order: Open Bypass Approval Flow: Level. Use	no ability to edit a PO, any must be done at the RQ sers should ignore the s' and ' Payments' tabs.

b. Guided Buying

In Guided Buying, the status of the RQ 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, the user will not see a separate PO like they would in Expert View, but a link to the Expert View version of the PO will display in the bottom-left of the RQ.

Date re	equested March 13, 2023	Amount \$5.00000 USD		Ordered
	854 S RQ C 3/13 se orders: NC517994		On the ' Your Requests ' page, click on the ' Ordered ' RQ tile for further options on managing the PO, or click on the PO ' Order ID ' to go to directly	
Date re	equested March 13, 2023	Amount \$1.00000 US	to the PO in Expert View.	Ordered

- 1. In Guided Buying, click on the 'Ordered' RQ within 'Recent requests' or on the 'Your Requests' tab.
- 2. The '**Request details**' page will display, and the user will have three options to choose from at the top of the page.
- 3. **Change request:** Click to initiate a change to the order. The specifics of this process are covered in a subsequent section.

- 4. **Cancel request:** Click to initiate the cancellation to the order. The specifics of this process are covered in a subsequent section.
- 5. 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 RQ.
- 6. The PO '**Order ID**' will display as a link on the right side of the RQ above the line items. This will take the user to the Expert View version of the PO.



V. Changing/Cancelling an Existing Purchase Order

When a change needs to be made to a Purchase Order (PO) that has already been sent to the supplier, a change order can be created within NC eProcurement. Once a change order is created, NC eProcurement will append a version number to the end of the Requisition (RQ) and PO number (e.g., -V2, -V3, etc.) if the requested change is significant enough to generate a new version of the PO.

Before creating the change, users will need to verify the order is not closed to invoicing in NCFS. Creating a change to an order closed to invoicing will cause the order to fail when the change order is sent to NCFS. If the line to be changed has been fully received, users will receive a message indicating 'the line is fully received and cannot be changed.'

Change orders submitted by the requester will go back through the RQ's approval flow when certain fields are updated. Encumbrance does not take place in NCFS until the final approval occurs in NC eProcurement. Users should check their entity's policies prior to making changes to an RQ.

a. Expert View

- 1. In Expert View, find the RQ associated with the PO that needs to be changed. This can be done by accessing the RQ from the '**My Documents**' Portlet or by using the '**Search**' bar.
- 2. Click on the RQ 'ID' or the 'Title' of the RQ to display the 'Ordered' RQ's 'Summary' tab.

3. Click the 'Change' button to initiate a change to the RQ. If the 'Change' button does not appear, the order may be closed for changes.

Note: In order to cancel the order completely, click the **'Cancel'** button. If the original order was transmitted to the supplier, a cancellation notice will be sent to the supplier. If the original order was not sent to the supplier, the cancellation also will not be sent. POs that have been partially or fully invoiced cannot be cancelled. In this case, a change order will need to be created and the quantities of the line items to be cancelled will need to be set to zero.

			Q 🖶 🔊 😣 🛕	
- {	RQ98854 - DHHS RQ C 3/13		Status: Orde	ed
	Copy Change Cancel Receive	Print		
$\langle \uparrow$	Summary Order Receipts History		_	
	Title: DHHS RQ C 3/13	Click 'Change' or 'Cancel,' depending on the	Cart Summary	
	Need-by Date: () Entity: 13 - Department of Administration	nature of the change needed, at the top of the	Central Poly-Ba (2) \$5.00000 US	D
	On Behalf Of: ADMIN Requester Suppress Order:	'Summary' page on the 'Ordered' RQ.	Total (2 items) \$5.00000 U	5D
	Budget Check Status: Fail - Invalid Accounting Distributions My Labels: Apply Label V		1	

4. Make the necessary changes and click the '**Submit**' button.

Note: The RQ# is now appended with a version number (in this case **'-V2'**). Once submitted, the new version will appear in **'Submitted'** status in the **'My Documents'** portlet, and if necessary, the approval flow will be retriggered to approve the change before it is sent to the supplier.

				a 🖶 🙍 🧕 🙆
$\langle \cdot \cdot \rangle$	RQ98854-V2: DHHS RQ C 3/13		🖶 Print Continue Shopping Update Taxe	rs Delete Save Submit
	Summary			
	Title: *	DHHS RQ C 3/13		Cart Summary
	Entity:	13 - Department of Administration		Central Poly-Ba (2) \$5.00000 USD
	On Behalf Of:	ADMIN Requester	The RQ# now has the version	Total (2 items) \$5.00000 USD
	Delay Purchase Until:	0	number appended to the end.	
	Suppress Order:	0		Check
	Budget Check Status:	Fail - Invalid Accounting Distributions		
	My Labels:	Apply Label 🗸 🛈		
	Ship To: *	13PT V		

b. Guided Buying

- 1. In Guided Buying, click on the 'Ordered' RQ that needs to be changed within 'Recent requests' or on the 'Your Requests' tab.
- 2. Click the **'Change request'** button to initiate the change. The **'Change requisition?'** pop-up will display asking the user to confirm the desire to make a change.

NC & PROCUREMENT Guided Buying	1	$\hat{\boldsymbol{\mu}}^2$ $\boldsymbol{\mu}^2$ $\boldsymbol{\Lambda}$
C DHHS RQ C 3/13 Request detats / RQ98854		Change request Cancel request
Ordered	▲ Change requisition?	×
Ship to NC DOA-Office of Fiscal Mgmt. Raleigh, NC 27699 United States	Changing the requisition will generate another version.	st \$5.00000 USD t Click 'Change request' or 'Cancel request,' depending on the nature of
The ' Change requisition pop-up will display asking for confirmation of the desire to make a chang	ng Show advanced options	the change needed, at the top of the ' Request detail ' page on the ' Ordered ' RQ.

3. Make the necessary changes to the versioned RQ and click the 'Send request' button.

NC +PROCUS	ELMENT Guided Buying					<u></u>	88
< Samp Checko	Le Guided Buying Diff ut / DHHS RQ C 3/13 V-2	IS RQ C 3/13				Send request Silve and exit	
Shi	ip to	Manage locations	Charge to	Manage details	Total Cost	\$411.24000 USD	
Rate	6: PURCHASING & IOGISTICS eigh, NC 27603 red States		Company (1308)		Net Amount	\$411.24000 USD	?
Ite	ms (1)		and cli reque	the any changes ck 'Send st' to resubmit Q to its approval			
>		r Paper MPSON & LITTLE, INC.		zuanuty	5137.08000 USD	Net Amount \$411.24000 USD Gross Amount () \$411.24000 USD	

4. The status is updated to 'Change in progress' and if necessary, the approval flow will begin again.

NC +PROCUREMENT Guided Buying	💩 र ⁹ ो
C Sample Guided Buying DHHS BO C 3/13 Request details / DHHS RO C 3/13-V2	Total Cost \$411.24000 USD Withdraw Edit
Change in progress Approval Flow	The newly versioned RQ now has a status of 'Change in progress' until it is reapproved and goes back updates back to 'Ordered' status.
Request ADMIN SUPERVISOR ADMIN Budget Approver	ADMN Purchasing Agen ADMN Chief Procureme Approved