NC eProcurement Approving a Purchase Requisition

The approval process for NC eProcurement allows the appropriate personnel to approve, edit, or deny items that have been requested in NC eProcurement. Each Purchase Requisition (PR) must be fully approved within NC eProcurement before the Purchase Order is generated and sent to the supplier. The approval flow for each user may differ based on the user's management level, supervisor chain, and entity.

Approvers may set their NC eProcurement email preferences to receive an email notification each time a PR is sent to them for approval. The requests will appear in Your Approvals even if the approver elects not to receive the notification. For more information regarding email notifications, please refer to Section VI: Edit Email Notification Preferences in the '**Getting Started**' job aid.

Notifications for approval requests will also appear on the bell icon in the upper right of the screen in Guided Buying.

Note: The Approval process can be completed in both Guided Buying and Expert view. This job aid will cover the Approval process in the Guided Buying view in sections I through IV, then cover the same process and any differences in Expert View in sections V through VII.

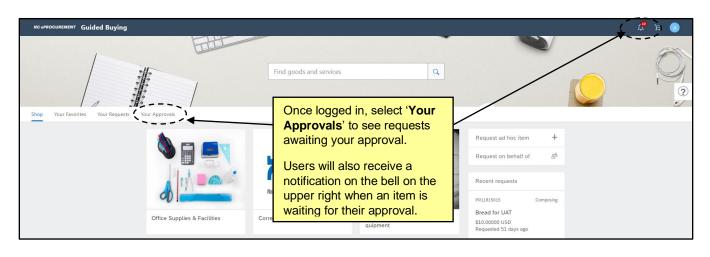
I. Navigating to Your Approvables in Guided Buying

When logging in to NC eProcurement, users will be brought to the Guided Buying landing page. To see items currently waiting for approval, select '**Your Approvals**' at the top of the page.

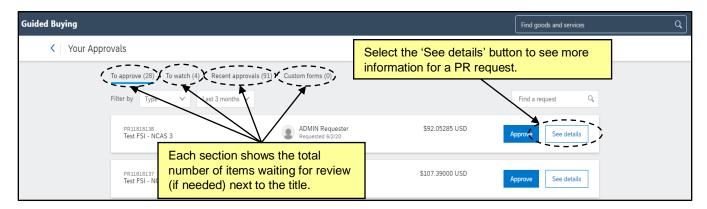
Note: Users without the ability to create Purchase Requisitions (PR) may go straight to 'Your Approvals.'

1. On the top of the '**Your Approvals**' page, there are 4 different sections, with the total number of remaining requests in each section displayed next to the name:

- a. 'To approve' will show all PRs currently waiting for active approval by the user.
- b. 'To watch' contains PRs that the user has been designated as a watcher on the approval flow.
- c. 'Recent approvals' contains items recently approved by the user.
- d. 'Custom forms' is for Security Administrator use and will remain empty for most users.



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II. Approving a Purchase Requisition – Guided Buying

Once a Purchase Requisition (PR) is submitted for approval, the approvers have the option to either approve the request or to deny it. A user may approve a PR only if the approver is listed as the active required approver in the approval flow of the request.

1. PRs that are waiting to be reviewed will appear on the '**Your Approvals**' page under the '**To approve**' tab. Select '**See details**' to review the PR.

Note: If the '**Approve**' button is selected instead of '**See details**', a pop-up box will appear with space to leave a comment if needed/desired on the PR and the option to '**Approve**' or '**Cancel**'. If the request is approved, then it will immediately move to the next person in the approval flow without showing any further details.

NC & PROCUREMENT Guided Buying				Find goods and services	् र ्रि
< Vour App	rovals				
	To approve (12) To watch (0) Recent Filter by Type ✓ Last 3 mon			Find a request Q	(?
	PR11818138 Test FSI - NCAS 3	ADMIN Requester Requested 6/2/20	\$92.05285 USD	Approve See details	
	PR11818005 Test Requisition	Approve request	×	Approve See details	
	PR11818034 New Test 8a1			Clicking the 'Approv this screen will send	the PR to the
	PR11817600 Test			next person in the ap immediately without Selecting ' Cancel ' w	further review.
	PR11817849 New Test 8a		pprove	pop-up.	
	PR11817945 New Test 8a	ADMIN Warehouse Purchaser Requested 5/28/20	\$905.00000 USD	Approve See details	

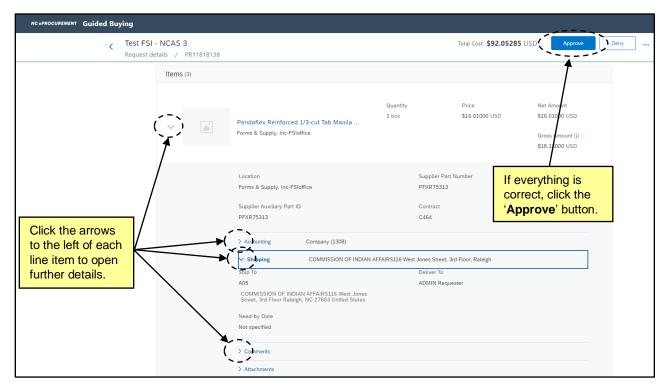
- 2. Once on the PR Summary page, review the details for the purchase request.
 - a. When approving PRs, the Approval Flow and Comments sections will appear first. Scroll down the page to see more about the items or services being requested.

b. Line item information can be found by selecting the arrows on the left side to expand each section as needed.

Note: Users with the necessary permission can also edit the request during the approval process. This includes updating line items and adding comments and attachments. For more details regarding this process in Guided Buying, reference Section IV: Editing a Purchase Requisition as an Approver.

3. Click the 'Approve' button if the details of the order are correct.

NC & PROCUREMENT Guided Buying		🕢 🛪 🖞
Test FSI - NCAS 3 Request details / PR11818138	Total Cost \$92.05285 USD	Approve Deny
Approval Flow	⊙⊙	ADMN Chief Procureme
Comments The year comment Budget Integration User 6/2/20	Share with su	The ' Approve ' and ' Deny ' button will appear for every approver. Users may see the option to ' Edit ' the PR if they have the correct permissions.
Attachments	t.3Transaction passed The Summary page as an approver will always have the Approval Flow and Comments sections at the top. Scroll down to see line items.	ppller Add

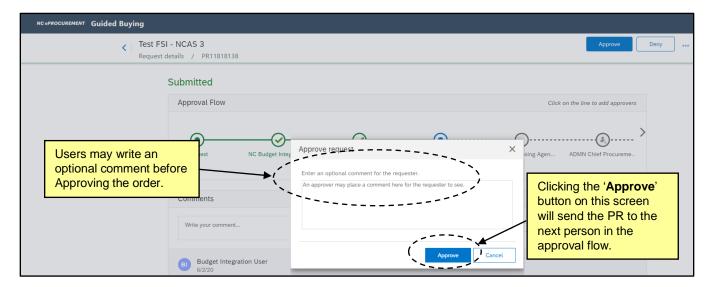


4. Once the user clicks '**Approve**,' the '**Approve request**' pop-up will appear. Add any comments as needed/desired and click '**Approve**' to approve the PR and send it to the next user in the approval flow or '**Cance**l' to continue looking over the request.

Note: PRs that have been recently approved will appear on the '**Recent approvals**' tab of the '**Your Approvals**' page.

Note for NCAS users: Once all required approvers have approved the request, the PR will become a Purchase Order and is automatically sent to the supplier. The status of the PR and Purchase Order will be '**Ordered**.'

Note for Community College, School System, and Non-Integrated users: Once all required approvers have approved the PR, the request is then sent to the appropriate financial system (e.g. Sunpac, LINQ, or Colleague) for further processing. The status of the PR will be '**Approved**' and will **not** change until the finished PR is sent back to NC eProcurement from the financial system, at which point both the PR and new Purchase Order will move into '**Ordered**' status.



III. Denying a Purchase Requisition – Guided Buying

Once a Purchase Request (PR) is submitted for approval, the approvers have the option to either approve the item or to deny it. A user may deny a PR only if the approver is listed as the active required approver in the approval flow of the request. After a PR is denied, the status will change from '**Submitted**' to '**Denied**'. The original requestor will receive an email notification indicating the PR has been denied. The requester must then withdraw the request to make the necessary changes.

1. PRs that are waiting to be reviewed will appear on the '**Your Approvals**' page under the '**To approve**' tab. Select '**See details**' to review the purchase request.

Note: In order to '**Deny**' an order, the user must select '**See details**' and go to the PR Summary page. The '**Deny**' button will only appear on the Summary page.

Guided Buying				Find goods and services	Q
< Your Appre	To approve (28) To watch (4) Recent approvals (91) Filter by Type ✓ Last 3 months ✓ PR11818138 Test FSI - NCAS 3	Cust	Click the ' See details ' button to see further PR information. Denying an order requires going to the PR Summary page.	Find a request Q	
	PR11818137 Test FSI - NCAS 2		ADMIN Requester \$107.39000 USD Requested 6/2/20	Approve See details	

2. Review the PR to determine whether it should be approved or denied.

Note: For information on approving PRs, please see Section I – Approving a Purchase Requisition.

3. If the user determines that the PR should be denied, click the '**Deny**' button to deny the request. The requester will then be able to withdraw the order to revise or delete it.

NC & PROCUREMENT Guided Buying						
	- NCAS 3 etails / PR11818138			Total Cost \$92.	.05285 USD Approve	Deny
	Items (3)	Pendaftex Reinforced 1/3-cut Tab Manila Forms & Supply, Inc-FSIoffice	Quantity 1 box	Price \$16.01000 USD	Net Amount 5 \$16.01000 VSD Gross Amount () \$18.13000 VSD	
Click the arrows		Location Forms & Supply, Inc-FSIoffice Supplier Auxiliary Part ID PFXR75313		Supplier Part Number PFXR75313 Contract C464	If the order need be sent back to t requester, click t ' Deny ' button.	<mark>he :</mark>
to the left of each		Accounting Company (1308) Shipping COMMISSION OF INDIAN AI	FFAIRS116 Wes	st Jones Street, 3rd Floor, Raleigh		
line item to open further details.		Ship To A05 COMMISSION OF INDIAN AFFAIRS116 West Jones Street, 3rd Floor Raleigh, NC 27603 United States Need-by Date Not specified Comments		Deliver To ADMIN Requester		
	``	> Attachments				

4. Once the user clicks '**Deny**,' the '**Deny request**' pop-up will appear. Add a comment for the requester explaining the reasons for denying the order, and then click '**Deny**.'

Note: Requests that have been recently denied will appear in the 'Recent approvals' tab on the 'Your Approvals' page.



IV. Editing a Purchase Requisition as an Approver – Guided Buying

During the approval process within Ariba, approvers may choose to edit the Purchase Requisition (PR) to make changes. Approvers will have the ability to make these edits based on whether they were granted the editing role in NC eProcurement. Editing a PR may require that the PR be re-approved by the preceding approval flow if both the Edit Threshold or Tolerance is broken by the editor.

1. PRs that are waiting to be reviewed will appear on the '**Your Approvals**' page under the '**To approve**' tab. Select '**See details**' to see the PR details.

Guided Buying					Find goods and services	Q
< Your Appro	ovals		Click the 'See details' button			
	To approve (28) To watch (4) Recent approvals (91)	Cus	to see further PR information.			
	Filter by Type V Last 3 months V		Editing an approval request requires going to the PR	\sim	Find a request Q	
	PR11818138 Test FSI - NCAS 3		Summary page.	,	Approve See details	
	PR11818137 Test FSI - NCAS 2	9	ADMIN Requester \$107.39000 USD Requested 6/2/20	,	Approve See details	

2. If, after reviewing the PR details, the user determines that the PR needs to be edited, click the three dots next to the '**Deny**' button, then click the '**Edit**' option that appears.

Note: If '**Edit**' is not appearing, your user profile may not have the Edit role.

NC & PROCUREMENT Guided Buying		С, Н 🕜
Paper Towels - NCEP Office - Southeastern Paper - Request details / PR11817708		
Submitted Approval Flow	Click the three dots next to the ' Deny ' button to access the ' Edit ' option.	(\mathfrak{T})
Request NC Budget Integratio	ADMIN Supervisor ADMN Budget Approver ADMN Purchasing Agen ADMN Chief Procureme	
Comments		
Write your comment	Share with supplier Add	

3. The 'Edit PR?' pop-up will appear to confirm that the user would like to edit the PR, and doing so will update the PR to be edited. Click the 'Edit' button to confirm that you would like to continue. Clicking 'Cancel' will close the pop-up and cancel the Edit process.

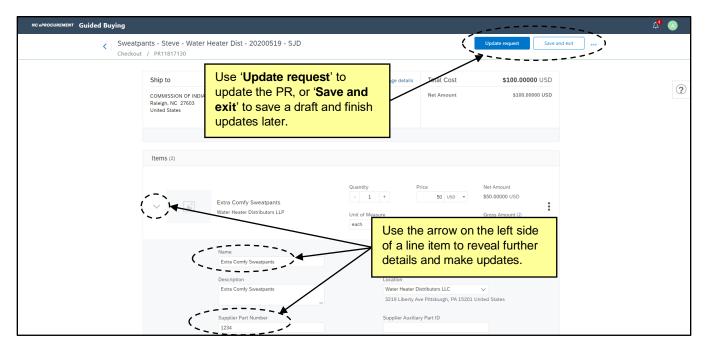
NC & PROCUREMENT Guided Buying		1º k 💧
Paper Towels - NCEP Office - Southeaste Request details / PR11817708		
Submitted	Edit	?
Approval Flow	Click on the line to add approvers	
Request NC Budget Inter	▲ Edit requisition?	
	This action withdraws the regulsition so you can edit it on the checkout page. Write comments (optional)	
Write an optional comment, then click ' Edit ' to continue with making changes.	Leave comments here. Edit Cancel Share with supplier Add	
Budget Integration User 5/26/20		

- 4. Make the edits to the PR details.
 - a. Click '**Update request**' to save changes and send the request back into the approval flow.
 - b. Click '**Save and exit**' to save a draft of the updated PR and finish the edits later.

Note: After making edits to the PR, the user will still need to approve it.

Note: If edits are made that exceed the Edit Tolerance and Threshold for your entity, then the PR may need to be re-approved by the entire approval flow again. Users should contact their Security Administrator for more information on the Thresholds set up for their entity.

STATE DEPARTMENT STATE BRANCH. LOCAL GOVERNMENT CITY COUNTY COMMUNITY COLLEGE PUBLIC SCHOOLS I J NORTH CAROLINA OFROCUREMENT PURCHASS ONLINE SHOPPING STATEWIDE TERM CONTO ACT LECTRONIC VENDOR PORTAL HUB CERTIFIED V UDTE PUNCHOUT CATALCO SOURCHASE ORDER GUDDING BIDDING



- 5. Click on 'View PR' on the pop-up that appears to be brought back to the Request Details page.
 - a. The updated PR will also be on the 'Your Approvals' page under the 'To approve' tab.
- 6. Click the 'Approve' button once the PR is confirmed to be correct.

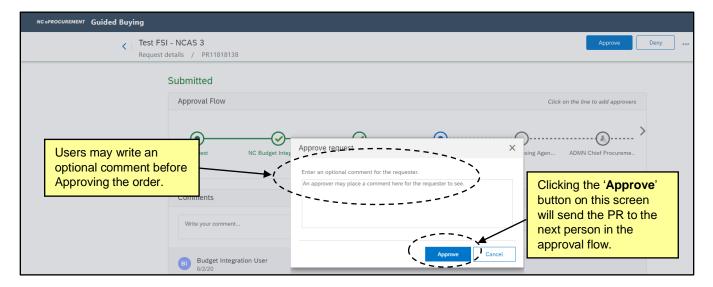
NC OPROCUREMENT Guided Buying						
N N	- NCAS 3 etails / PR11818138			Total Cost \$92 .	.05285 USD	Deny
	Items (3)	Pendaflex Reinforced 1/3-cut Tab Manila Forms & Supply, Inc-FSIoffice	Quantity 1 box	Price \$16.01000 USC	Net Amount \$16.01000 USD Gross Amount () \$18.16000 USD	
Click the arrows to the left of each line item to confirm the updates were made		Location Forms & Supply, Inc-FSIoffice Supplier Auxiliary Part ID PFNR75313		Supplier Part Number PFXR75313 Contract C464	If everything is correct, click the ' Approve ' button.	
successfully.		Acdounting Company (1308) Stlipping COMMISSION OF INDIAN A	FFAIRS116 We	st Jones Street, 3rd Floor, Raleigh		
		Ship To A05 COMMISSION OF INDIAN AFFAIRS116 West Jones Street, 3rd Floor Raleigh, NC 27603 United States Need-by Date Not specified > Columents		Deliver To ADMIN Requester		

7. Once the user clicks 'Approve,' the 'Approve request' pop-up will appear. Add a comment if needed and click 'Approve' to approve the PR and send it to the next user in the approval flow or 'Cancel' to continue looking over the request.

Note: PRs that have been recently approved will appear on the '**Recent approvals**' tab of the '**Your Approvals**' page.

Note for NCAS users: Once all required approvers have approved the request, the PR will become a Purchase Order and is automatically sent to the supplier. The status of the PR and Purchase Order will be '**Ordered**.'

Note for Community College, School System, and Non-Integrated users: Once all required approvers have approved the PR, the request is then sent to the appropriate financial system (e.g. Sunpac, LINQ, or Colleague) for further processing. The status of the PR will be '**Approved**' and will **not** change until the finished PR is sent back to NC eProcurement from the financial system, at which point both the PR and new Purchase Order will move into '**Ordered**' status.



V. Finding Approvables in Expert View

When using NC eProcurement, users may wish to approve Purchase Requisitions (PRs) while in Expert View.

Note: For more information on navigating between Guided Buying and Expert View, please see the '**Getting Started**' job aid.

- 1. In Expert View, the user can find PRs waiting for action in the 'To Do' portlet on the 'Procurement' tab.
- 2. The Required Action for each item is on the right side of the portlet.
 - a. 'Approve' indicates the user must actively review and approve the PR.
 - b. 'Watch' means the user is a Watcher in the approval flow and may view the PR details, but approval is not required.

Note: The 'To Do' portlet may also appear on the 'Home' tab.

NORTH CAROLINA PROCEEDENT							् 🖶 🧑	8
HOME PROCUREMENT	CATALOG						Recent ∨ Manage ∨	Create
Purchase Order	c	order ID	\checkmark	Q				2
Common Actions	To Do							
Create	14	Date ↓	From	Status	Title		Required /	Action
Requisition	PR11815988	5/5/2020	ADMIN Requester	Submitted	Test		Approve	_
Manage Receive	PR11816360	5/5/2020	ADMIN Supervisor	Submitted			Approve)
Personal Workspace	PR11816237	5/4/2020	ADMIN Supervisor	Submitted	The Required Action		Approve	-
My To Do More ✓	PR11816235	4/30/2020	ADMIN Supervisor	Submitted	column in the ' To Do '		Approve	
	PR11815072	4/13/2020	ADMIN Requester	Submitted	portlet tells the user what		Approve	
The ' To Do ' por	tlet can	4/10/2020	ADMIN Supervisor	Ordered	action to take on the		Watch	<u>`</u>
appear on both				-				View
and 'Procurem								
PR11818236 Test SHI - NCAS 8	ID		Title			Date 1	Status	
More 🗸	🗊 RC3228		TEST UNRECEIV	ING		4/3/2020	Approved	
	PR11813907		Correction Enterp	orises Punchout Catalog		4/3/2020	Composing	
	PR11814184		Paper Towels			4/7/2020	Composing	

- 3. If the '**To Do**' portlet was deleted from the '**Home**' or '**Procurement**' tabs, use these steps to add the portlet back to the dashboard:
 - a. Click the wrench on the upper right of the tab, and click 'Add Content' from the menu.
 - b. Under the '**General**' section, locate the '**To Do**' item, and click and hold down the left mouse button over the portlet item once the arrows appear.
 - c. Drag the 'To Do' portlet to the desired location outlined in blue dots on the page.
 - d. Once added back, the system may take a couple minutes to populate the portlet.

Note: If the '**To Do**' portlet is missing from both tabs and does not appear in the '**Add Content**' menu, please contact the Help Desk for further assistance.

HOME PROCUREMENT C.	ATALOG			-	Q 🖶 🛞 🚱
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Create Requisition	ID 2 RC3228	Title TEST UNRECEIVING	down menu.	te † /2020	Add Content Edit Properties Delete Tab
Manage Receive Personal Workspace	 PR11813907 PR11814184 	Correction Enterprises Punchout Catalog Paper Towels		4/3/2020	Tab Set Options
My To Do More V	PR11814190			4/7/2020	Add New Tab Compare Your Tabs to Default Settin
	RC3397	Catalog with Bid		4/7/2020	Revert Tab Set to Default Settings
Recently Viewed \sim	E RC3557	Correction Enterprises Punchout Catalog		4/9/2020	Approved
PR11814738 8ersal Paper T	PR11814748	Pants		4/9/2020	Composing
PR11818137 Test FSI - NCAS 2	PR11814854	FOR UAT Ariba Network #1		4/9/2020	Ordered
PR11818370 Test PR11818234 Test SHI - NCAS 8	🛱 EP4900504	FOR UAT Ariba Network #1		4/9/2020	Ordered
PR11818236 Test SHI - NCAS 8	RC3615	FOR UAT Ariba Network #1		4/9/2020	Composing
More 🗸					View More

HOME PROCUREMENT CATALOG			Q 🚔 ⑦ ⊗ 🔥 Add Content ① Done
Purchase Order 🗸 Title Order	D V Q		Click and Drag content items below onto the dashboard.
Common Actions V My Documents			Action Tiles Add
Create ID ID	Title	10 Do	To Do
The 'To Do' portlet can be	TEST UNRECEIVING Correction Enterprises Punchout Catalog	4/3/2020	T Common
placed in any area outlined	Paper Towels	112020	Calendar
by blue dots, indicating the		4/7/2020	E Saved Search
location/size of the object.	Catalog with Bid Correction Enterprises Punchout Catalog	Click and drag the	Reports Chart/Table
PR11814738 8ersat Paper 1 PR11814748	Pants	'To Do' portlet onto	# Folder
PR11818137 Test FSI - NCAS 2 PR11818370 Test PR11818370 Test	FOR UAT Ariba Network #1	the dashboard.	Summarized View
PR11818234 Test SHI - NCAS 8	FOR UAT Ariba Network #1	4/9/2020	Ordered
PR11818236 Test SHI - NCAS 8	FOR HAT Ariba Network #1	4/9/2020	Composing 👻
			View More 🗸
Drop Here	Drop H	ere	
News			
friendly, and easily navigat Check out the site today a NCAS Guided Buying: Clic	rocurrement website has a fresh new look! The modern new site is now more user-friendly, mobile- egrocurrement.nc.gov!	Drop Here	
EP Lite Guided Buying: Cli			

VI. Approving a Purchase Requisition – Expert View

The Purchase Requisitions (PRs) that appear in the '**To Do**' portlet on the '**Procurement**' tab are approvables that require the action of the user that is currently logged in.

- 1. Click on the PR 'ID,' 'Title,' or the 'Approve' link on the 'To Do' portlet.
 - a. Selecting 'ID' or 'Title' will bring the user to the PR Summary page.
 - b. Clicking '**Approve**' will bring the user to an abbreviated Summary page, with only the basic line item details such as Line Item Description, Quantity, Price, and Total Amount visible. The Approval Flow will also be displayed. To view additional PR details before approving, the user should select the '**ID**' or '**Title**' on the '**To Do**' portlet instead.
 - c. Users may also search the system for the PR number to approve awaiting requests.

Note: The 'View All' link in the bottom right of the 'To Do' portlet will display the number of PRs awaiting action, organized by category.

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HOME PROCUREMENT	CATALOG						Recent 🗸 🛛 Manage 🗸	Create V
Purchase Order 💙 Title		Order ID	~	Q				2 0
Common Actions	✓ To Do							~
Create	ID	Date ↓	From	Status	Title		Required Acti	ion
Requisition	PR11818137	6/2/2020	ADMIN Requester	Submitted	Test FSI - NCAS 2		Approve	. ^
Manage Receive	PR1181813	6/2/2020	ADMIN Requester	Submitted	Test FSI - NCAS 1		Approve	
Personal Workspace	PR11817993	5/29/2020	ADMIN Requester	Submitted	Test		Approve	
My To Do	PR11817804	5/27/2020	ADMIN Requester	Submitted	Test		Approve	
More V	PR11817711	5/26/2020	ADMIN Requester	Submitted	Sweatpants - Steve - W	Vater Heater Dist - 20200526 - SJD	Approve	
Recently Viewed	_		ər	Submitted	Paper Towels - NCEP O	Office - Southeastern Paner - 20200526 - S ID	Approve	
PR11814738 8ersal Paper T PR11818137 Test FSI - NCAS 2 PR11818370 Test PR11818234 Test SHI - NCAS 8 PR11818236 Test SHI - NCAS 8	or 'Appro PR to mo			Produce State of	To all	The ' View All ' menu shows every PR with required action.		View All V Receive (17) Watch (4) Approve (27)
More V	approval	screen.	NRE	CEIVING		4/3/2020	Approved	`~

2. Review the PR details and click the 'Approve' button if the PR is correct.

Note: Users with the necessary permissions can also edit the PR during the approval process. This includes updating line items and adding comments and attachments. For more details regarding this process in Expert View, reference Section VIII: Editing a Purchase Requisition as an Approver.

Note: The approval flow for a PR is now found on the Summary page, above the Line Items section.

NOTTH CAROCHEMENT				Q 🚔 @ 😒 🗚
PR11818137 - Test FS	SI - NCAS 2			Status: Submitted
Approve D	Print Print			
Title: Entity: On Behalf Of: Suppress Order: ERP Reference ID:	Test FSI - NCAS 13 - Department of Addinestration ADMIN Requester PR11818137 Not applicable ()	Review the request details for the PR by scrolling down, and then click the ' Approve ' button when complete.		Cart Summary Forms & Supply (2) \$103.39000 USD Charges \$4.00000 USD Total (3 items) \$107.39000 USD
FOB Code: My Labels: Ship To: Deliver To:	(NCAS) 001 - Destination freight paid I Apply LabeL 🗸 🕕 A05 ADMIN Requester	by vendor and included in price. Title passes upon receipt. Vendor files any claims.	-	
• Comments (1) Comments	U		Vsible to Suppl	The ' Cart Summary ' shows the number of lines and total for the PR.
Budget Integrati	1:Transaction passed, [Tuesday, June 2, 202	2:Transaction passed, 3:Transaction passed O at 12:07 PM] Reply	No	
Add Comment				
Attachments:	@ Add Attachment			

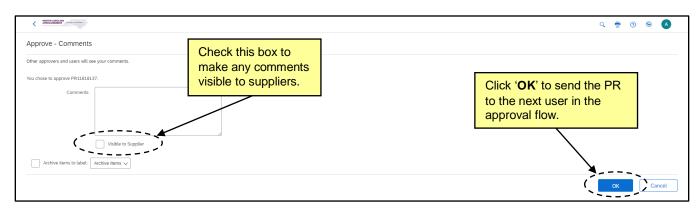
Comments				
Budget Integrati 1.Transaction passed, 2.Trans [Tuesday, June 2: 2010		Add comments or attachments as nee	Visible to Supplier No	
Add Comment Attachment: @ Add Attachment				
Approval Flow				
Submitted Approved User (NC Budget Integration)	Active ADMIN Supervisor	Pending Pending DMN Budget Approver ADMN Purchasi	· · · · · · · · · · · · · · · · · · ·	Approved
▼ Line Items				
3 Items Total				Show Details
No. † Type Description	Qty Unit Price Discount	Net Amount Charges	Taxes Amount	Multi Year Indicator Stock Keeping Unit FOB Code
1 🖗 Bostitch Ergonomic Desktop Stapler - 20	1 each \$11.41000 USD		the ' Detail ' button to more information for ne item.	(NCAS) OO1 - Destination freight paid by vendor and the Detail passes upon receipt. Vendor files any claims.

3. Once the user clicks '**Approve**,' the '**Approve - Comments**' page will appear. Add any necessary comments and click '**OK**.'

Note: PRs are automatically moved to the Archive label after being approved unless another label is selected. To change the label to which the item is assigned, use the dropdown box beside '**Archive items to label**' and choose the appropriate label. For more information about Labels, reference the '**Personal Labels**' job aid.

Note for NCAS users: Once all required approvers have approved the request, the PR will become a Purchase Order and is automatically sent to the supplier. The status of the PR and Purchase Order will be '**Ordered**.'

Note for Community College, School System, and Non-Integrated users: Once all required approvers have approved the request, the PR is then sent to the appropriate financial system (e.g., Sunpac, LINQ, or Colleague) for further processing. The status of the PR will be '**Approved**' and will not change until the finalized PR is received back from the financial system, at which point it will move to '**Ordered**' status.



VII. Denying a Purchase Requisition – Expert View

Once a Purchase Requisition (PR) is submitted for approval, the approvers have the option to either approve the PR or to deny it. A user may deny a PR only if the approver is listed as the active required approver in the approval flow of the request. After a PR is denied, the status will change from '**Submitted**' to '**Denied**'. The original requestor will receive an email notification indicating the PR has been denied and must withdraw the request to make the necessary changes.

The items that appear in the '**To Do**' portlet on the '**Procurement**' tab are approvables that require the action of the user that is currently logged in. The required action is displayed on the right side of the portlet.

- 1. Click on the PR 'ID,' 'Title,' or the 'Approve' link on the 'To Do' portlet.
 - a. Selecting 'ID' or 'Title' will bring the user to the PR Summary page.
 - b. Clicking '**Approve**' will bring the user to an abbreviated Summary page, with only the basic line item details such as Line Item Description, Quantity, Price, and Total Amount visible. The Approval Flow will also be displayed. To view additional PR details before approving, the user should select the '**ID**' or '**Title**' on the '**To Do**' portlet instead.
 - c. Users may also search the system for the PR number to approve awaiting requests.

Note: The 'View List' link in the bottom right of the 'To Do' portlet will display the number of PRs awaiting action, organized by category.

HOME PROCUREMENT	CATALOG						Q 🚔 ⊘ Recent ∨ Manage ∨	
Purchase Order 🗸 Title	_	Order ID	×	Q				٩ (
Common Actions	√ To Do							~
Create	ID	Date 4	From	Status	Title		Required	Action
Requisition	PR11818137	6/2/2020	ADMIN Requester	Submitted	Test FSI - NCAS 2		Approve)
Manage Receive	PR118181	6/2/2020	ADMIN Requester	Sabmitted	Test FSI - NCAS 1		Approve	
Personal Workspace	PR11817993	5/29/2020	ADMIN Requester	Submitted	Test		Approve	
My To Do	PR11817804	5/27/2020	ADMIN Requester	Submitted	Test		Approve	
More 🗸	PR11817711	5/26/2020	ADMIN Requester	Submitted	Sweatpants - Steve - Wa	ter Heater Dist - 20200526 - SJD	Approve	
Recently Viewed			ter	Submitted	Paper Towels - NCEP Off		Approve	
PR11814738 8ersal Paper T PR11818137 Test FSI - NCAS 2 PR11818370 Test	Click on the or 'Approv			E coloniari	₩	The ' View All ' menu shows every PR with		View All Receive (17)
PR11818370 Test PR11818234 Test SHI - NCAS 8 PR11818236 Test SHI - NCAS 8	PR to move approval so					required action.	Status	Watch (4) Approve (27)
More 🗸	approvar sc	leen.	NRE	CEIVING		4/3/2020	Approved	~

2. Review the PR to determine if it should be approved or denied.

Note: For information on approving PRs, see Section VI: Approving a Purchase Requisition.

3. If the approver determines that the PR should be denied, click the '**Deny**' button to deny the request and return it to the original requestor.

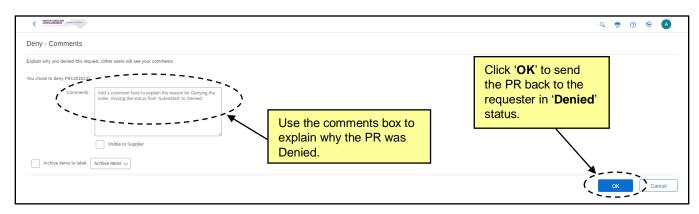
Note: A user who is designated as a 'Watcher' in the approval flow will not have the option to deny the PR.

A NECOLOGY AND A NECOLOGY			٩	🖶 🤗 😵 💧	
PR11818137 - Test FSI - NCAS 2				Status: Submitted	d
Approve. Deny Print					
Summary Orders Recepts History					
Title: Test FSI - NCAS 2 Entity: 13 - Department of Administration		1	Cart Summary		Ļ
Ching, 12 Ceptaninen u Auministration On Behalf OC: ADMIN Requester Suppress C		í	Forms & Supply (3) Charges	\$103.39000 USD \$4.00000 USD	
ERP Reference If the PR details must be corrected		```	Total (3 items)	\$107.39000 USD	/
by the original requester, click the Buying to the original requester, click the 'Deny' button.			````		
My La					
Ship To: A05 Deliver To: ADMIN Requester					
Need-by Date: ()		The 'Car	t Summary	,	
Comments (1)			e number of		
Comments			for the PR.	lines	
	Visible to Suppli				
Budget Integrati 1:Transaction passed, 2:Transaction passed, 3:Transaction passed	No				
[Tuesday, June 2, 2020 at 12:07 PM] Reply					
Add Comment					
Attachment: # Add Attachment					



4. Once the user clicks '**Deny**,' the '**Deny - Comments**' page will appear. Add a comment about why the order was denied and click '**OK**.'

Note: PRs are automatically moved to the Archive label after being denied unless another label is selected. To change the label to which the item is assigned, use the dropdown box beside '**Archive items to label**' and choose the appropriate label. For more information about Labels, reference the '**Personal Labels**' job aid.

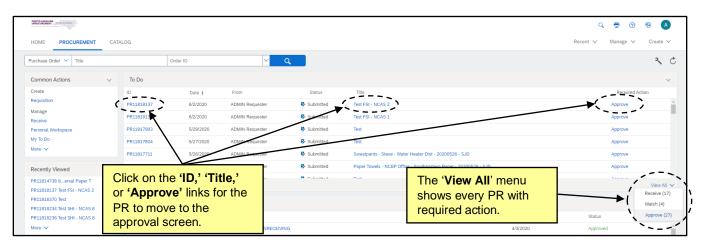


VIII. Editing a Purchase Requisition as an Approver – Expert View

During the approval process within Ariba, approvers may choose to edit the Purchase Requisition to make changes. Approvers will have the ability to make these edits based on whether they were granted the editing role in NC eProcurement. Editing a PR may require that the PR be re-approved by the preceding approval flow if both the Edit Threshold or Tolerance is broken by the editor.

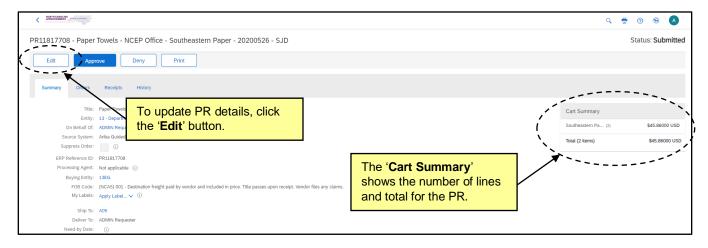
1. Click on the PR 'ID,' 'Title,' or the 'Approve' link on the 'To Do' portlet.

Note: Clicking '**Approve**' will bring the user to an abbreviated Summary page, with only the basic line item details such as Line Item Description, Quantity, Price, and Total Amount visible. The Approval Flow will also be displayed. For more PR details, the user should select the '**ID**' or '**Title**' on the '**To Do**' portlet instead.



2. Click the 'Edit' button that appears next to 'Approve' and 'Deny' on either the PR Summary or Approving pages.

Note: If 'Edit' is not appearing, your user profile may not have the Edit role.



- 3. Make edits to the PR. Line items may be updated by checking the box next to the appropriate line number and clicking 'Edit Details' from the 'Actions' drop-down menu.
- 4. Click 'Save' to save the updates made to the PR.

 Approx 	oval Flow									
Submi	itted 🗸 🗸 Budget I	Approved Integration User (NC Budget Inte	gration) Approved ADMIN Supervisor	Approved	N Budget Approver)	Active ADMN Purchasing Agent	• •	Matcher Procurement Officer	Approved	
▼ Line I	Items									
2 Items Te	ōtal								Show De	tails 💼
1-1	No. † Type Description		To update line	items check	Discount	Net Amount	Charges	Taxes	Amount	
(🗸	UNIVERSAL KE	RAFT 8" ROLL TOWEL 6/800" F		o a line and use		\$17.14000 USD		\$0.00000 USD	\$17.14000 USD	
'	/					Click 'S	Save' to fi	nish making		
	2 🗐 UNIVERSAL KF	RAFT 8" ROLL TOWE 12/600"	and select 'Ed	drop-down menu			s to the P		2000 USD	
				in Delaiis.			<u> </u>			
4	Actions V More N	Import Acc	ounting Update Total		-					
	- Copy-Selected Lines			J						
'~ .	Edit Details									
	Edit Discount Edit Charges								<	
	Edit Taxes								×	
	Delete Selected Lines							Continue Shoppir	ng C Save	Exit
	Delete Discounts									
SAD	Delete Charges									
ADMIN	Delete Taxes	5/2020 1-47 PM State American C1	102							

5. Users will be taken back to the Summary page for the PR, where they'll be able to approve the newly updated PR.

Note: If edits are made that exceed the Edit Threshold and Tolerance for your entity the below warning screen will appear, and the PR may need to be sent through the approval flow for re-approval. Users should contact their Security Administrator for more information on the Thresholds set up for their entity.

A PROVIDENCE IN THE REPORT OF		् 🖶 📀 😁 🔺
PR11817708: Paper Towels - NCEP Office - Southeastern Paper	🛱 Print	< Prev Save Exit
The changes you made to this document may require the approval of different people. Anba will regenerate the approval flow automatically.		
		< Prev Save Exit

6. Once the user clicks '**Approve**,' the '**Approve - Comments**' page will appear. Add any necessary comments and click '**OK**.'

Note: PRs are automatically moved to the Archive label after being approved unless another label is selected. To change the label to which the item is assigned, use the dropdown box beside '**Archive items to label**' and choose the appropriate label. For more information about Labels, reference the '**Personal Labels**' job aid.

Note for NCAS users: Once all required approvers have approved the request, the PR will become a Purchase Order and is automatically sent to the supplier. The status of the PR and Purchase Order will be '**Ordered**.'

Note for Community College, School System, and Non-Integrated users: Once all required approvers have approved the request, the PR is then sent to the appropriate financial system (e.g., Sunpac, LINQ, or Colleague) for further processing. The status of the PR will be '**Approved**' and will not change until the finalized PR is received back from the financial system, at which point it will move to '**Ordered**' status.

		Q 🚔 @ 😣 💧
Approve - Comments	Check this box to	
Other approvers and users will see your comments.	make any comments	
You chose to approve PR11818137.	visible to suppliers.	Click ' OK ' to send the PR
Comments:		to the next user in the approval flow.
Visible to Supplier		
		OK Cancel

IX. Approving Funds Exceptions (NCAS Only)

If a requisition fails to integrate with NCAS due to insufficient funds, the requester may choose to select the '**Request Funds Exception**' checkbox before resubmitting the PR. This adds the Override Budget Officer (OBO) to the end the approval flow so that they may override the funds checking with NCAS and allow the order to be fully approved. The OBO for the entity will need to edit the requisition and select the radio button for '**Yes**' on the Override Funds Exception field.

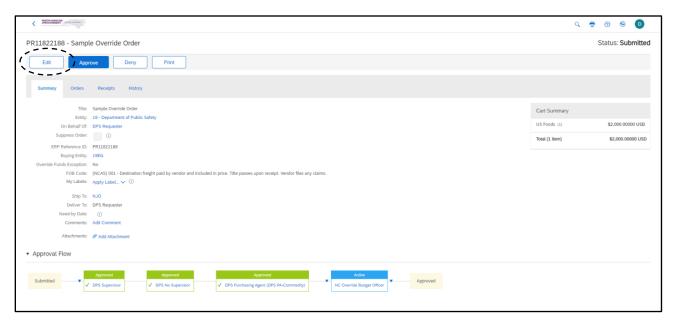
Note: It is possible for the user acting as the OBO to be in the approval flow more than once - for example as both the supervisor for the requester as well as in the Override Budget Officer group at the end of the approval flow. The OBO will have to follow the override process the **first time** they appear in the approval flow. The system will **not** allow the user to approve the order until they have selected '**Yes**' in the Override Funds Exception field.

1. Click on the PR 'ID,' 'Title,' or the 'Approve' link on the 'To Do' portlet.

ADDITICATOLINA APROCULEMENT							् 🖶 🧭) 😌 🔺
HOME PROCUREMENT	CATALOG						Recent 🗸 🛛 Manage 🗸	Create N
Purchase Order 💙 Title		Order ID	~	Q				2
Common Actions	√ To Do							
Create	ID	Date 4	From	Status	Title		Required	LAction
Requisition	PR11818137	6/2/2020	ADMIN Requester	Submitted	Test FSI - NCAS 2		Approve)
Manage Receive	PR11818136	6/2/2020	ADMIN Requester	Submitted	Test FSI - NCAS 1		Approve	-
Personal Workspace	PR11817993	5/29/2020	ADMIN Requestor	Submitted	Test		Approve	
My To Do	PR11817804	5/27/2020	HOMIN Requester	Submitted	Test		Approve	
More V			101.00.1	Submitted	Sweatpants - Steve - Water Heater Dist - 20200526	- SJD	Approve	
Recently Viewed	Click on	the 'ID.'	'Title.'	Submitted	Paper Towels - NCEP Office - Southeastern Paper -	20200526 - SJD	Approve	
PR11814738 8ersal Paper T	or 'Appr			Providencial and the second	*		·	View A
PR11818137 Test FSI - NCAS 2								Receive (1
PR11818370 Test PR11818234 Test SHI - NCAS 8	PR to mo	ove to th	е					Watch (4)
PR11818236 Test SHI - NCAS 8	approval	screen.				Date 1	Status	Approve (
More V	☑ RC3228		TEST UNRECEN	ING		4/3/2020	Approved	

2. Click the 'Edit' button at the top of the page.

Note: Clicking the '**Approve**' button at the top of the page **before** editing the requisition and approving the funds exception will result in a system error.



3. In the header of the requisition, next to the Override Funds Exception field select 'Yes.'

Note: The Override Budget Officer will **not** be able to save the requisition without setting the Override Funds Exception to '**Yes.**'

4. Click 'Save' to save the changes made to the requisition.

						۹ 🖶	0 8 0
PR11822188: Sample Override Orde	er			🛱 Print	Continue		Exit
Summary				Click ' Save ' to save changes to			
Title:*	Sample Override Order			the requisition.		Cart Summary	
Entity: 19	9 - Department of Public Safety	The Override Funde Execution				US Foods (1)	\$2,000.00000 USD
On Behalf Of:	DPS Requester	The Override Funds Exception				Total (1 item)	\$2,000.00000 USD
Delay Purchase Until:	0	field will default to ' No ' and must					
Suppress Order:		be changed to 'Yes' before				Check	
ERP Reference ID: PF	R11822188	approving the requisition.					
Buying Entity: * 19	9EG						
Override Funds Exception:	Yes No						
FOB Code:	(NCAS) 001 - Destination freight paid by ven	dor and included in price. Title passes upon receipt. Vendor files any claims. \sim					
My Labels: Ap	pply Label 🗸 🛈						
Ship To: *	OLN OLN	~					
Deliver To: *	DPS Requester						

- 5. Click the 'Approve' button to approve the requisition.
 - a. The requisition will continue through the approval flow where it may need to be approved again by the OBO at the end of the approval flow as noted at the beginning of this section.
 - b. Once approved by the final approval group the requisition will be sent to NCAS and will turn into a purchase order, moving into '**Ordered**' status.

				९ 🖶 🔊 🛞 D
PR11822188 - Samp	le Override Order			Status: Submitted
Edit (App	rove Deny Print			
Summary Orders	Receipts History			
Title:	Sample Override Order		Cart Summary	
Entity:	19 - Department of Public Safety			
On Behalf Of:	DPS Requester		US Foods (1)	\$2,000.00000 USD
Suppress Order:	i		Total (1 item)	\$2,000.00000 USD
ERP Reference ID:	PR11822188	The Override Funds Exception		
Buying Entity:	19EG	field will show ' Yes ' next to it if the		
Override Funds Exception:	Yes			
	(NCAS) 001 - Destination freight paid by ver	changes were made successfully.		
My Labels:	Apply Label 🗸 🛈			
Ship To:	OLN			
	DPS Requester			
Need-by Date:	(i)			
Comments:	Add Comment			
Attachments:	Ø Add Attachment			