NC eProcurement
DOT Quick Guide

NC eProcurement is a user-friendly, online purchasing system that offers cost savings and an efficient purchasing process to government users. It can be accessed by users in North Carolina Agencies, Community Colleges, School Systems, and local governments. NC eProcurement utilizes the cloud platform of SAP Ariba Procurement software for purchasing functions.

NC eProcurement is designed to enable users to complete a variety of procurement functions based on business and job needs. It provides users with a more efficient approval process, more purchasing options, and easier access to catalogs, contracts, and reports. NC eProcurement is accessible through two layouts – **Guided Buying** and **Expert View**. Both access the same system, but there are differences in appearance as well as minor variances in function.

I.   Logging In

To access NC eProcurement, users will click the link from the NC eProcurement website and then be asked to enter NCID credentials.

> **Note:** NCID User IDs and passwords are case-sensitive.

**NC eProcurement
Getting Started**

STATE DEPARTMENT STATE BRANCH
LOCAL GOVERNMENT CITY COUNTY
COMMUNITY COLLEGE PUBLIC SCHOOLS
NORTH CAROLINA ePROCUREMENT PURCHASE
ONLINE SHOPPING STATEWIDE TERM CONTRACTS
ELECTRONIC VENDOR PORTAL HUB CERTIFIED V'
QUOTE PUNCHOUT CATALOG
L PURCHASE ORDER
SOURCING
BIDDING
BUY

II. Guided Buying Tour

After logging in, users will be brought to the 'Guided Buying' landing page. Guided Buying is one of two layouts available to access NC eProcurement. It has a familiar on-line shopping appearance designed to make routine purchases easier for basic users, especially from Statewide Term Contract catalogs.
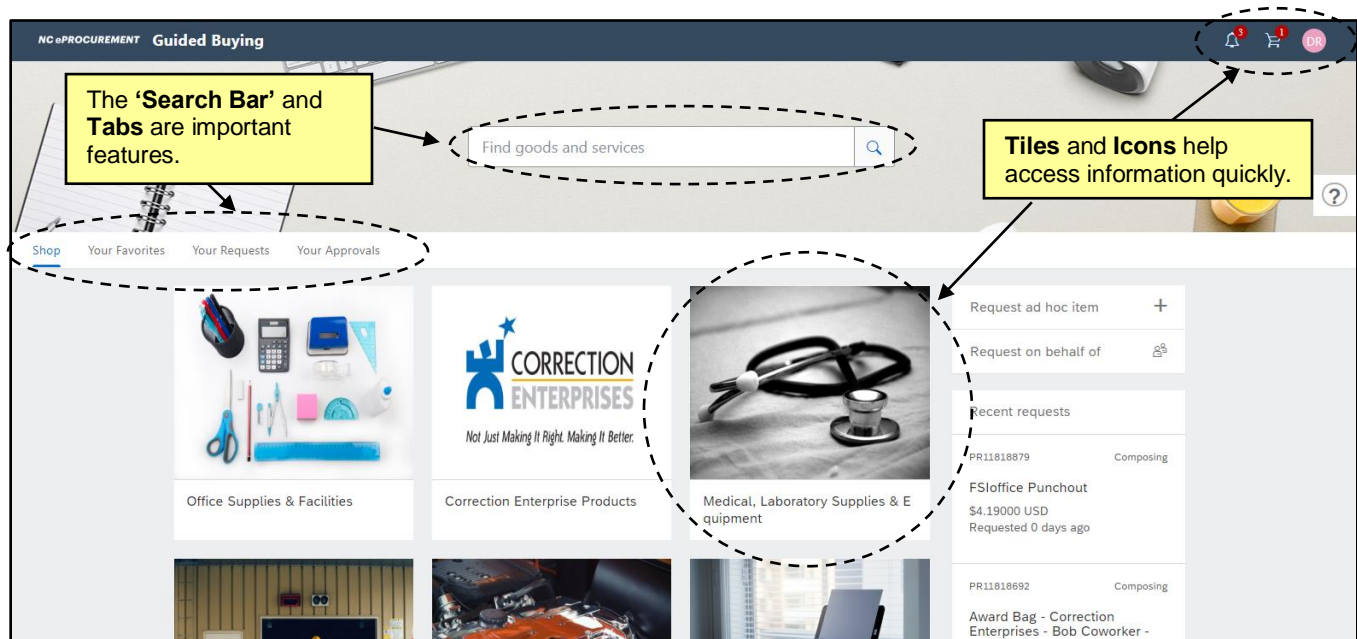
There are three icons at the top right of the screen:

1. **Bell:** This is where notifications, such as the need to approve or receive a requisition will appear.

2. **Shopping Cart:** Items that have been added to the requisition are represented here.

3. **Initial:** This icon brings up a menu of options where users can change their profile information, delegate authority, and change their email notification preferences. It is also where users should go to logout.

The '**Catalog Search**' bar appears in the upper, middle section of the page where users can search directly for catalog items. Just below, there are four tabs:

4. **Shop:** This tab has categories of items represented by square pictures called **'Tiles'** that organize products that are on Statewide Term Contract catalog so they can be added to the shopping cart. It is the default tab for many users.

5. **Your Favorites:** Users can mark certain catalog items that they purchase frequently as "favorites" and then find them to easily purchase on this consolidated page.

6. **Your Requests:** Users can see their requisitions and view the status.
    (**NCAS Only:** From here users can also view purchase orders that are pending desktop receipt and take action to receive on those items.)

7. **Your Approvals:** Requisitions pending approval will appear in this tab. Some users may default to this tab if they do not have the ability to create a purchasing requisition.

On the right-hand side of the page is the **'Right Rail'** with more options:

8. **Request Ad-Hoc Item:** Requesters who want to purchase something that is not available on a Statewide Term Contract catalog, also called a **'Non-Catalog'** item, can click to enter the item information manually.

9. **On Behalf Of:** To create a purchase requisition on behalf of another user, click **'On Behalf Of'** and select the user by email address, name, or ID in the window that appears.

   Note: A blue line will appear to indicate that the user is acting on behalf of someone else.

10. **Recent Requests:** Purchase requisitions that were recently created appear in this section. Clicking **'See All'** will take the user to the **'Your Requests'** tab.

The center of the page is made up of **'Tiles'**:

11. **Tiles:** Tiles are set up based on the most commonly purchased items that are on Statewide Term Contract. They are organized in hierarchies to make it easier to find the items a user is trying to find.

12. **Sub-tiles:** Clicking a '**Tile**' will bring you to the **'Sub-tiles'** that are associated with the **'Tile'** selected. **'Sub-tiles'** may lead users to punchout catalogs or standard catalog items.

   Note: Clicking **'NC eProcurement'** in the top left corner will reset the search and return the user to the Guided Buying landing page.

III. Expert View Tour

Expert View is geared towards all actions of the purchasing cycle instead of focusing on the creation of Purchase Requisitions (PR) as is the case in Guided Buying. All users have access to this view because some information can only be updated in Expert View. A PR that is created in Guided Buying can be viewed in Expert View and vice versa. It is a different layout of the same NC eProcurement system.
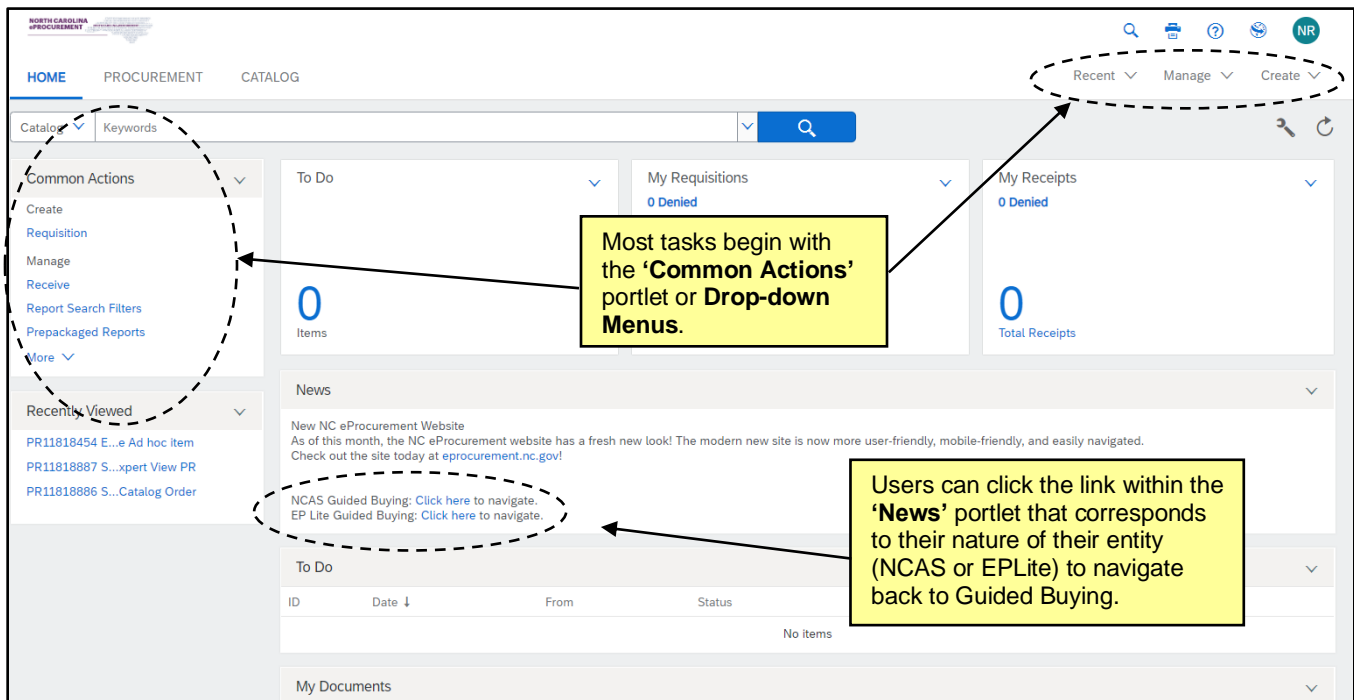
1. To access Expert View, scroll through the **'Tiles'** in Guided Buying and find the **'Expert View'** Tile.

2. Users will be brought to the Expert View **'Home'** tab.

There are five **Icons** in the upper right-hand corner:

1. **Search:** Clicking the search icon will open a menu with options for document types to search.

2. **Print:** Offers a printer-friendly view of the information on the Expert View 'Home' tab.

3. **Help:** Takes users to the SAP Ariba Help Center.

4. **Site:** Displays the site name.

5. **Initials:** This icon brings up a menu of options where users can delegate authority to another team member, change the user profile, modify email notification preferences, reset default preferences pertaining to visual screen displays, or logout.

The **Drop-down Menus** just below the icons allow users to access different types of information:

1. **Recent:** Access the most recently viewed or worked-on documents.

2. **Manage:** Manage documents or business processes.

3. **Create:** Create documents will display only document types the user is authorized to create.

4. **Search:** Search for documents. Displays only document types the user is authorized to view or process.

5. **Recent:** Access the most recently viewed or worked-on documents.

6. **Preferences:** Delegate authority to another team member, change the user profile, modify email notification preferences, and reset default preferences pertaining to visual screen displays.

The Expert View **'Home'** tab also contains a number of content items. The content items are customizable depending on a user's preferences, but the following list includes some of the more important features:

1. **Common Actions:** The **'Common Actions'** Portlet displays links to common actions to create and manage documents and provides another option to access the same functions as the **'Create'** or **'Manage' Drop-down Menus**.

2. **Search Bar:** Search for documents using the drop-down to select the type of document and the keyword to specify. If additional filters or information is necessary, select the document type and click the blue **'Search'** button to access the advanced search page.

   Note: If the **'Search'** button is clicked without selecting a document type, the default is 'Catalog' and the user will be sent to the Expert View **'Catalog'** tab.

3. **Action Tiles:** The default Action Tiles are My Requisitions, My Receipts, and To Do and offer the user a quick update on their activity in NC eProcurement.

   Note: These can be customized by clicking the down arrow and selecting the appropriate option.

4. **To Do:** The **'To Do'** Portlet lists the documents that require action. Click the document icon or the document title to open the documents and act on them. The **'View All…'** link in the lower right corner provides access to all documents by Document Type or Required Action. Click any column header to sort the list by that column's contents (for example, sort by **'Status'**). An arrow in the column header indicates the column by which you are sorting, and whether the sort is ascending or descending.

5. **My Documents:** The **'My Documents'** Portlet displays the most recent documents created. Click the document icon or the document title to open the document and review and complete the document, if required. The **'View All…'** link in the lower right corner provides access to all documents by Document Type. Click any column header to sort the list by that column's contents (for example, sort by **'Status'**). An arrow in the column header indicates the column by which you are sorting, and whether the sort is ascending or descending.

6. **Recently Viewed:** The **'Recently Viewed'** Portlet displays the five most recent documents accessed either to review or to work on.

7. **News:** Contains updates sent out by NC eProcurement. It also contains the link to get back to Guided Buying.

The Expert View **'Procurement'** tab contains the portlets most relevant to procurement. It does not have the **'Action Tiles'** or **'News'** portlet by default but those can be added. If a user logs out of NC eProcurement from the **'Procurement'** tab they will automatically be taken to this tab the next time Expert View is accessed.

   Notes:
   - All content on the tabs can be moved or changed using the down arrows next to the portlet name to remove items and the **'Wrench'** icon to add or configure content.

   - The **'Refresh'** icon next to the **'Wrench'** icon will force an update of all information in the portlets.
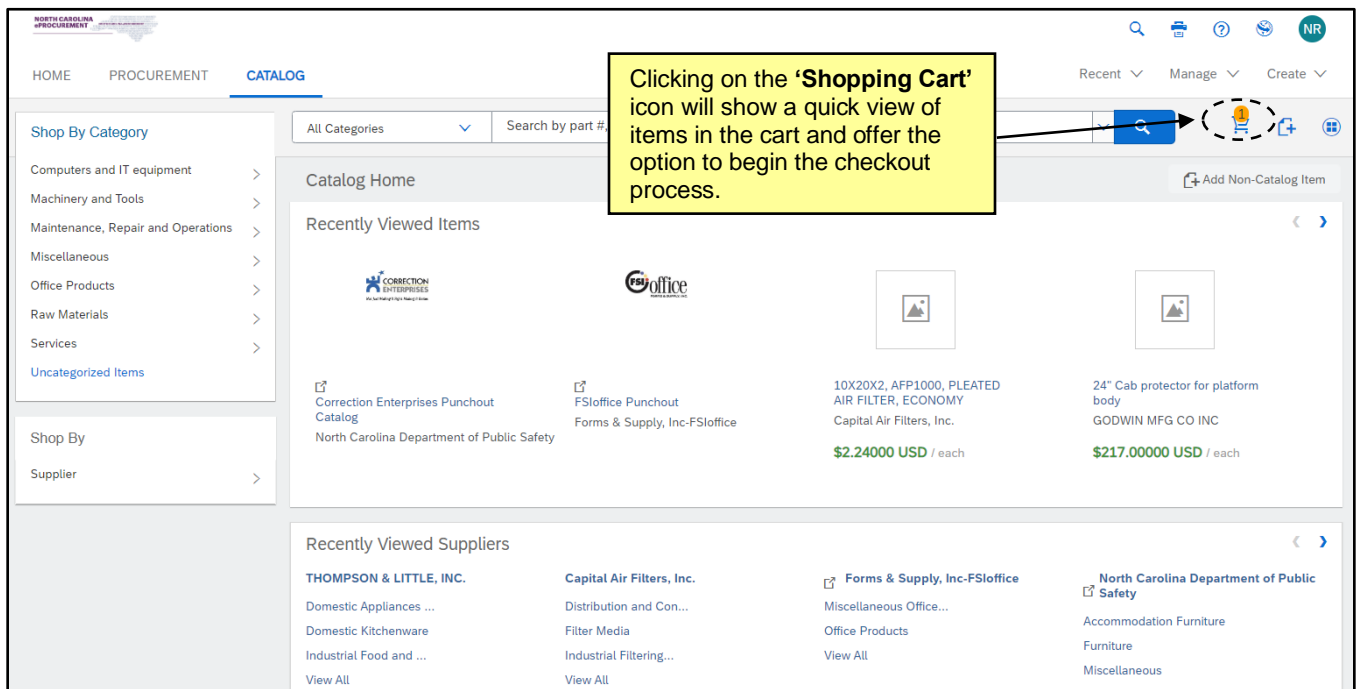
Tabs can be customized using the **'Wrench'** icon and information, such as Status, can be updated using the **'Refresh'** icon.
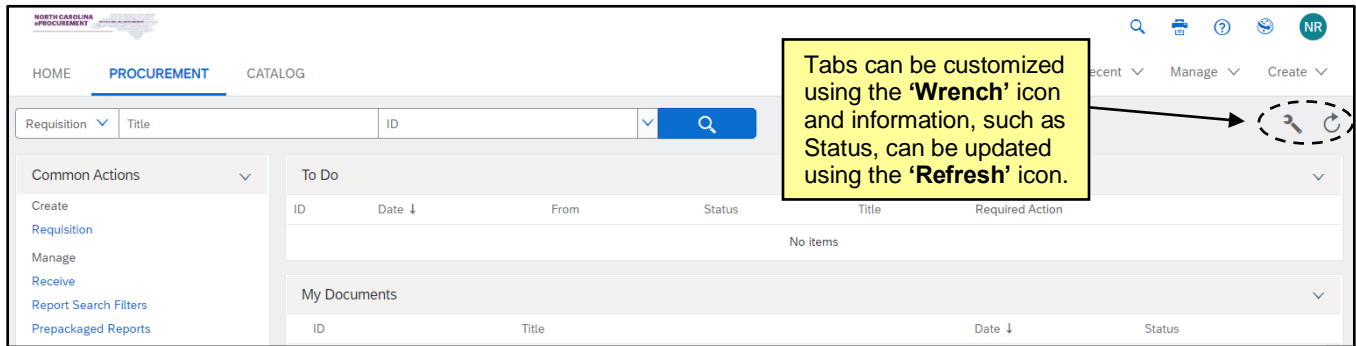
The Expert View **'Catalog'** tab provides the quickest way to search Statewide Term Contract items in Expert View. Users can search using keyword, Contract ID, or supplier. The panel on the left-hand side can help refine results.

> **Note:** Items can be added to the shopping cart, which automatically begins a purchase requisition for users that have the appropriate permission. The checkout process for the requisition can be started by clicking **'Checkout'** after clicking the **'Shopping Cart'** icon.

Clicking on the **'Shopping Cart'** icon will show a quick view of items in the cart and offer the option to begin the checkout process.

IV. Status of Requisitions and Purchase Orders

NC eProcurement Purchasing Lifecycle for **DOT**:

Purchase Requisition:

1. In the beginning of the purchasing lifecycle for DOT, a requisition is created, approved, and has funds encumbered completely within the SAP system.

2. The requisition is sent to NC eProcurement, which turns the requisition into a Purchase Order and sends the order to the supplier indicated on the requisition, giving it a status of '**Ordered**.'

   Note: If a DOT supplier is being used for the first time, there may be additional time required for vendor mapping within NC eProcurement. Subsequent orders to the same supplier will go through without the need for mapping.

Purchase Order:

3. The Purchase Order (PO) is electronically transmitted to the supplier(s) via email or the Ariba Network.

4. If the purchase order needs to be edited after it has been updated to '**Ordered**' status, users may create a change order by making changes in SAP and submitting the updated order to NC eProcurement.

5. Once the items have been physically received, the purchase order is ready to be received by the user in SAP and payment may be remitted to the vendor.

   Note: A PO can be cancelled by cancelling the order in SAP and sending the cancelation to NC eProcurement.

V. Searching

The system search functionality gives users the ability to search NC eProcurement to locate and view purchase requisitions, purchase orders, receipt information (NCAS only), user profile changes, and catalog items. The system search functionality is a quick and easy way to locate needed information. System searching offers a range of search criteria so users can conduct a search with minimal information. For example, users can search by requester, commodity code, creation date, and/or supplier name. Searching is best done in Expert View.

For similar or frequent searches, use the Saved System Search functionality. This allows users to directly access a previous system search quickly without entering specific search criteria again.
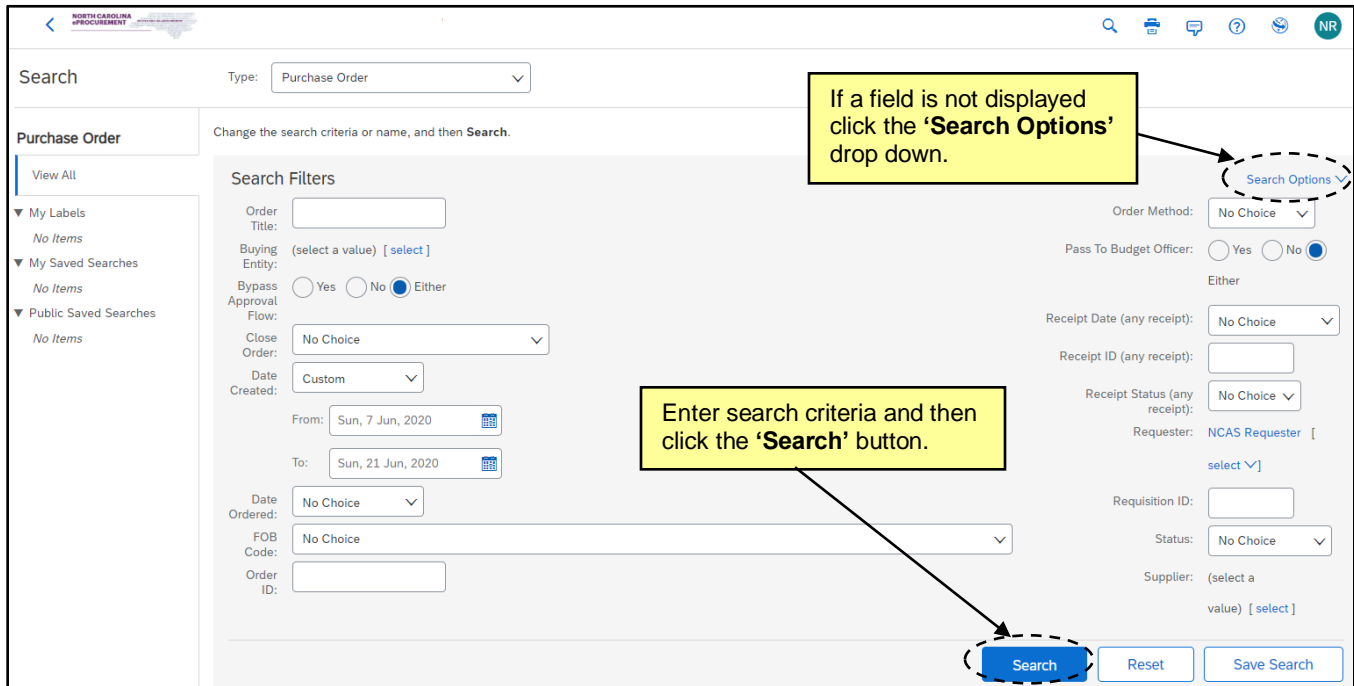
1. Select the type of search you would like to conduct using the drop-down menu in the **'Search'** Bar and click the blue magnifying glass/ **'Search'** button .
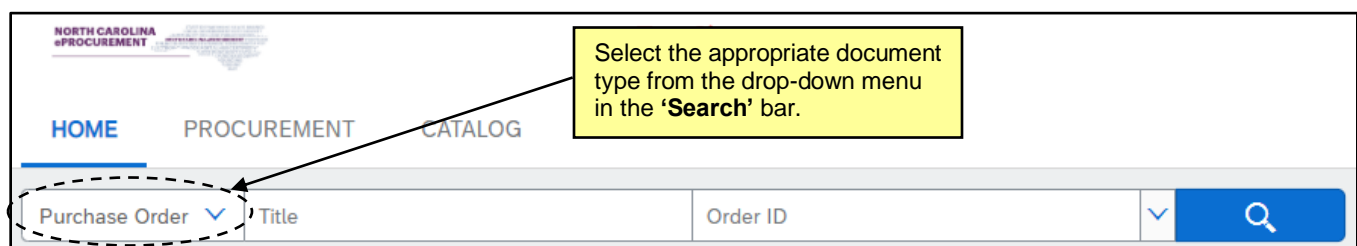
2. Enter the necessary search criteria in the appropriate fields to conduct a system search.

3. Add or remove search filters, as necessary, by clicking the **'Search Options'** link.

   Notes:
   - Users with the appropriate permissions can change the **'Type'** listed at the top of the **'Search'** page. Commonly searched Types include: Requisition, Purchase Order, Receipt, and User Profile. Select the appropriate category to return the desired transaction type.

   - The **'Requester'** field will automatically default to the user currently logged into NC eProcurement unless the User has the Global Reporting Role. For Users with the Global Reporting Role, this field will default to **'(select a value).'** Users can update this field, but if the User does not have the Global Reporting Role, the search results will not contain anything for other Users.

   - The **'Entity'** field will automatically default to the entity associated with the current user. This value can only be changed for users with cross-entity reporting permissions. All other users can only search for transactions associated with themselves or their entity.

   - Once **'Search Options'** has been clicked, users can add or remove search filters by selecting the desired search filter from the **'Search Options'** pop-up window.

   - Only the fields selected from the **'Search Options'** pop-up window appear on the **'Search Filters'** page.
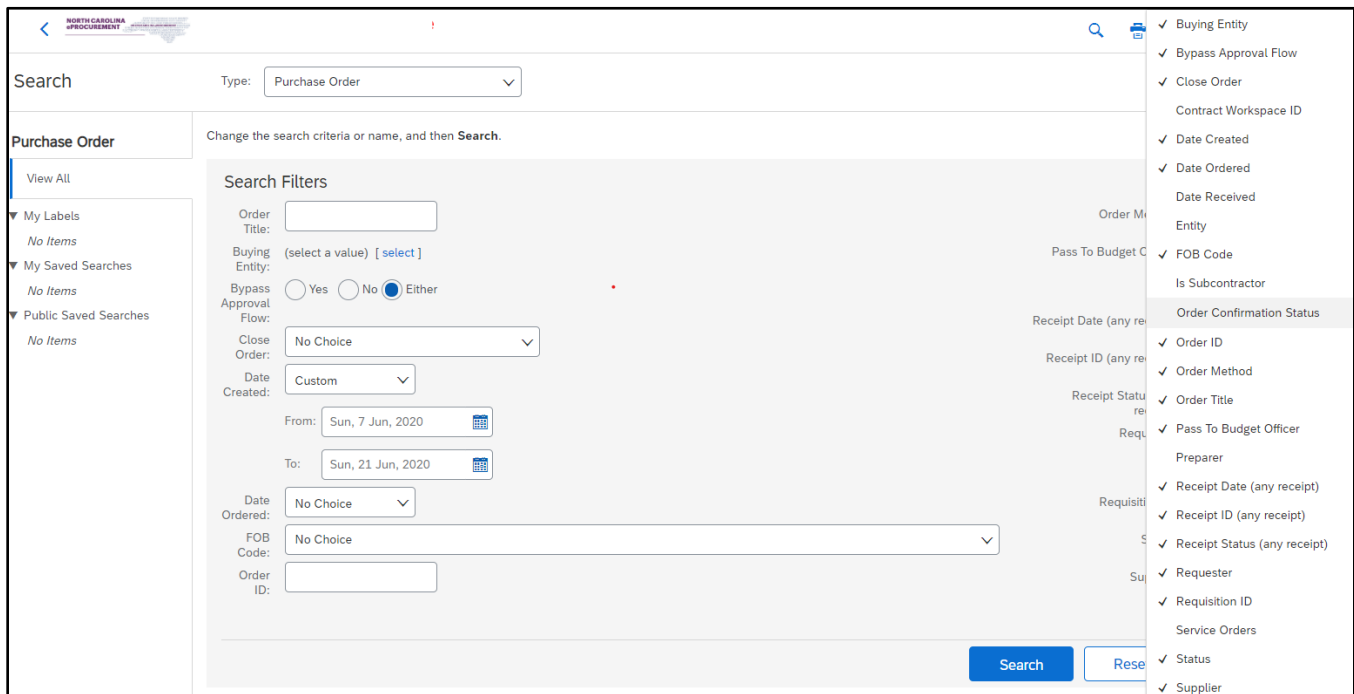
4. After entering the appropriate information in the search fields, click the **'Search'** button to complete the system search.

Note: Running searches that are too broad (such as starting a purchase requisition search without setting any filters, which would attempt to return all purchase requisitions in NC eProcurement) can be slow and return too much data, making it difficult to find the actual data needed. Utilizing the concept of smart searching can help lessen the amount of time it takes to perform a search. It is usually best to start with a narrow search, using as many filters as may apply, and broaden the search as needed.

5. To save this search for future use, click the **'Save Search'** button.

6. Enter a search name in the **'Search Name'** field.

7. Click **'OK'.**

8. Saved searches will appear on the Shortcut Menu for the specific **Type** of search that was saved (e.g., Requisition or Purchase Order).

Notes:
- To delete a saved search, click the top **'Delete'** button while viewing the saved search. To edit a saved search, click the **'Refine'** button.

- A saved search may also be added as a Portlet on an Expert View tab by clicking **'Configure Tabs'** and select **'Add Content'** on a tab.

VI. Fully Approved Purchase Requisitions

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

In Expert View, a separate Purchase Order (PO) beginning with **'EP'** is also generated and can be accessed from the PR 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.
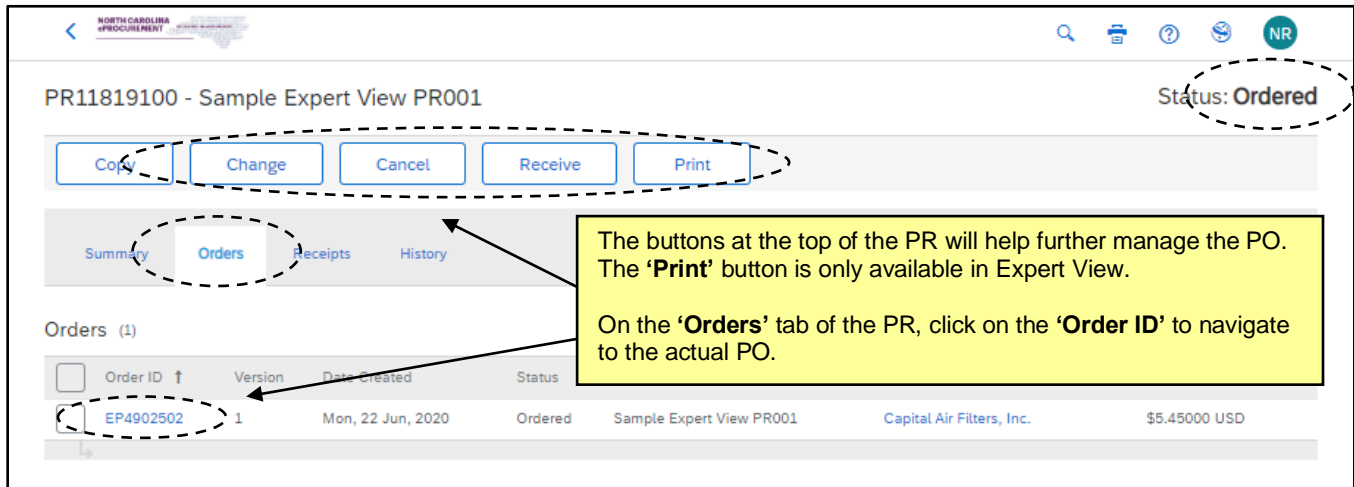
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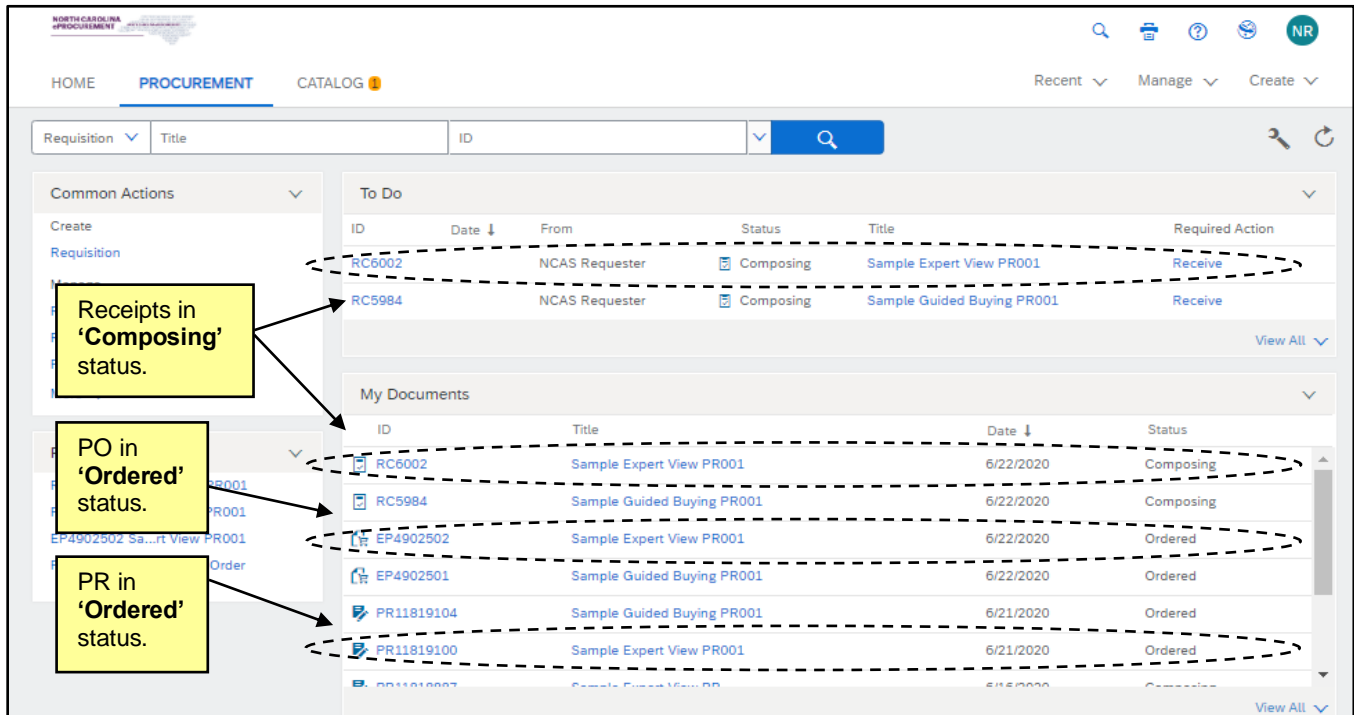
1. Clicking on the **'ID'** or **'Title'** of the **'Ordered'** PR in the **'My Documents'** portal will display five options at the top of the PR along with three tabs besides the **'Summary'** tab.

2. **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.

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'** PR.

   Note: The ability to print a PR is only available in Expert View. There is no print capability within the Guided Buying view.

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 **'EP.'**

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 PR went to **'Ordered'** status and was sent to the vendor.

The buttons at the top of the PR will help further manage the PO. The **'Print'** button is only available in Expert View.

On the **'Orders'** tab of the PR, click on the **'Order ID'** to navigate to the actual PO.

10. Clicking on the PO **'Order ID'** from either the **'Orders'** tab on the PR 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 PR 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 PR 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.

There is no ability to edit a PO, any changes must be done in the financial system. Users should ignore the **'Invoices'** and **'Payments'** tabs.