THE SOURCE

NC eProcurement Monthly Newsletter
August 2022 Edition

This month we review receiving purchase orders, share tips and tricks about sourcing and filtering searches in NC eProcurement, and provide information on a new statewide term contract and our upcoming training schedule.

RECEIVING NCAS PURCHASE ORDERS

The NC eProcurement purchasing order lifecycle begins when items are added to the cart in Guided Buying, or a purchase requisition (PR) is created in Expert View. After a PR is ‘Submitted,’ and approved, its status updates to ‘Ordered’ and a purchase order (PO) is generated and sent to the supplier(s). After all line items in the order have been delivered, verified, and accepted, the NC eProcurement purchasing order lifecycle is completed and the status is updated to ‘Received.’ It’s important that every line item in a PO is received in Ariba to ensure that all items are accounted for in NCAS.

To receive line items:

1. Access ‘Receiving’ through Expert View via multiple options:

   - **Option 1:** Select ‘Receive’ from Common Actions.
   - **Option 2:** Select ‘Receive’ from Manage drop-down.
   - **Option 3:** Locate the Purchase Order in the ‘To Do’ portlet.
   - **Option 4:** Locate the Purchase Order in the ‘My Documents’ portlet.

2. From the ‘Receiving Steps’ page, choose the PO to be received from the list or search by Order ID, Requisition ID, Receipt ID, or Contract ID.
3. Select a purchase order to receive, enter the number of items received in the ‘Accepted’ column, enter the packing slip number, select ‘Yes for ‘Close Order,’ and click ‘Submit.’

For more information about Receiving or instructions in Guided Buying, see the Receiving a Line Item job aid.

**SOURCING TIP: INITIATING APPROVAL TASKS**

After a Project Owner submits a document for approval, the appropriate approver(s) receive notification of a task to complete. This approval task allows approvers to either approve or deny Sourcing Project documents. Particularly, if the solicitation is over agency delegation, it needs to be approved by the Division of Purchase & Contract (P&C) before publishing. This can be done through the built-in ‘Gain P&C Approval of Sourcing Event’ task:

1. Navigate to the ‘Tasks’ tab on the Sourcing Project and to the ‘Gain P&C Approval of Sourcing Event’ task in ‘Phase 04.’ Click on the task and select ‘View Task Details’ from the drop-down menu.

2. On the ‘Approval Task’ page, in the ‘Select Approvers’ section, click on ‘Custom’ and then ‘Add Initial Approver’ on the next screen. Click the ‘Add approver to approval flow’ drop-down menu and select ‘Search more’ to find the applicable P&C Service Team.
3. Add a **Due Date** from the date picker, an optional note to P&C, and click **Submit**.

Users must initiate their Sourcing Event before the **Submit** button becomes available to click. Users should also confirm that the appropriate documents have been uploaded in the **Solicitation Documents** folder and the Sourcing Event has been updated before publishing.

For more information, see the [Managing a Sourcing Event](#) job aid.

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**TIPS & TRICKS: FILTERING SEARCHES**

The search function enables users to search NC eProcurement Buyer for purchase requisitions, purchase orders, receipt information, user profile changes, and catalog items. Search filters are useful in narrowing down search results. All filters on the **Search** page can be toggled on or off using the **Search Options** drop-down menu. A filter that is frequently turned off is **Date Created,** which by default, returns results from the previous 15 days only. To see items created prior to the last 15 days, the **Date Created** field should be hidden.

To hide the **Date Created** field:

1. On the **Search** page, select the **Search Options** drop-down menu on the upper right.

2. Uncheck the **Date Created** option on the menu.
The ‘Date Created’ field will no longer appear in the Search Filters section for the current session.

Note: The above steps can be used to add or remove any search filters as needed. Only the fields selected from the ‘Search Options’ drop-down menu will appear on the ‘Search Filters’ page.

For more information about search options, see the Getting Started job aid.

STATEWIDE TERM CONTRACT ANNOUNCEMENT

Statewide Term Contract 7612B Recycling Services for Electronic Equipment
The North Carolina Department of Administration (NC DOA) Division of Purchase & Contract (P&C) has established a new Statewide Term Contract 7612B - Recycling Services for Electronic Equipment. This is a multi-vendor mandatory Statewide Term Contract for state departments, most state agencies, and state higher education institutions (except under the conditions specified in G.S. §115D-58.14(a) and G.S. §116-13). The contract may also be utilized, without further competition, by non-mandatory state agencies and other eligible entities. The contract term is June 10, 2022, through June 9, 2025. If you have any questions related to this contract, contact Wanda Simmons at 984-236-0226 or wanda.simmons@doa.nc.gov.

TRAINING ROUNDPUP

The Division of Purchase & Contract (P&C) and NC eProcurement offer various training courses related to procurement throughout the year. For details about registering for a course, see How to Register. Check the NC eProcurement Course List periodically for additional training classes from the NC eProcurement team.

We look forward to (virtually) seeing you!
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