NC eProcurement

Advanced Purchasing

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 it's been created. Please refer to the two **'Creating Purchase 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 Purchase Requisition (PR) is created by the requester and has a status of **'Composing.'**

2. Once the information for the PR has been entered, it is **'Submitted'** for approval and pre-encumbrance.

3. A designated approver(s) reviews the PR. If approval is granted, the PR is sent to NCAS to encumber the funds. A Purchase Order is then generated in NC eProcurement and the status is updated to **'Ordered.'**

   Note: The first approver after a PR is **'Submitted'** is the **'NC Budget Integration'** group, a system-generated approval group that exists to check for pre-encumbrance with NCAS. If sufficient funding exists, this automated approver will take no action and the PR will immediately transfer to the next approver listed. If the PR fails the pre-encumbrance check, the status of the PR will be set to **'Denied.'**

4. The Purchase Order is electronically transmitted to the supplier using the preferred ordering method chosen by the vendor in their electronic Vendor Portal account.

5. 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.

   Note: 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:

   a. **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.

   b. **Confirmed:** The vendor has indicated that they have received this PO through their Ariba Network account.

   c. **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.

   d. **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.

6. 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 Purchase Requisitions in Composing Status

a. 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.

1. 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.

2. **Delete:** Removes the PR and all of its contents from the system.

3. **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.

4. **Edit:** Unlocks the PR for the user to make any changes or additions before ultimately clicking **'Submit.'**

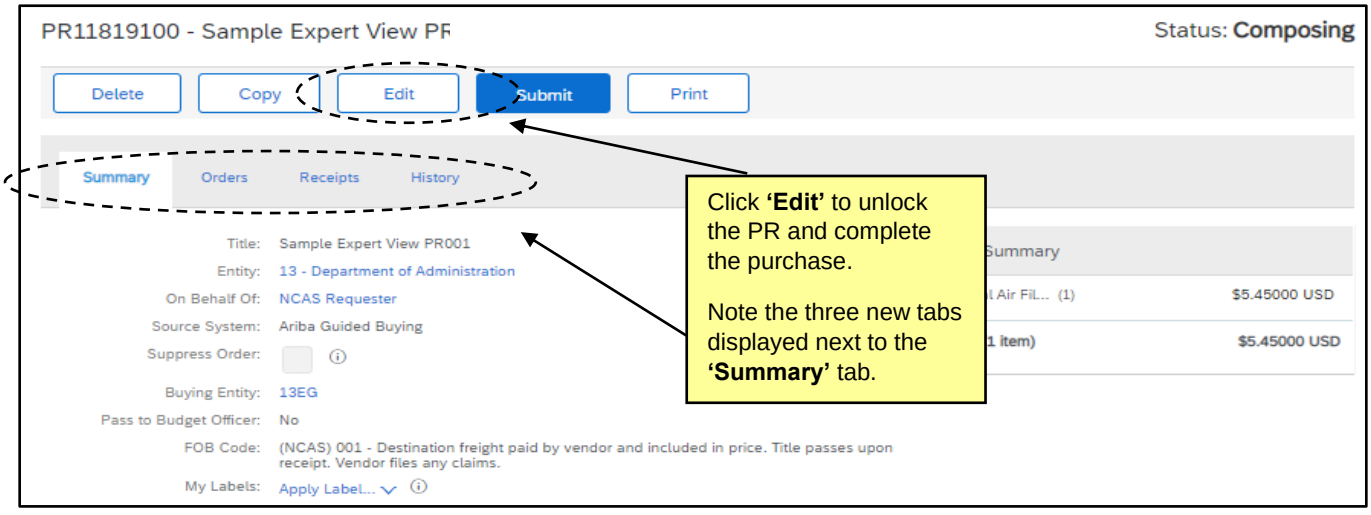
5. **Submit:** Sends the PR to be approved by the approval flow. If the PR is not yet ready to be submitted, error messages will display guiding the user to the fields that need attention.

6. **Print:** Generates the print summary of the **'Composing'** PR.

7. The **'Orders'** tab will be empty at this point until the PR is fully approved and has turned into a Purchase Order.

8. The **'Receipts'** tab will be empty at this point until the PR 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.



b. 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.

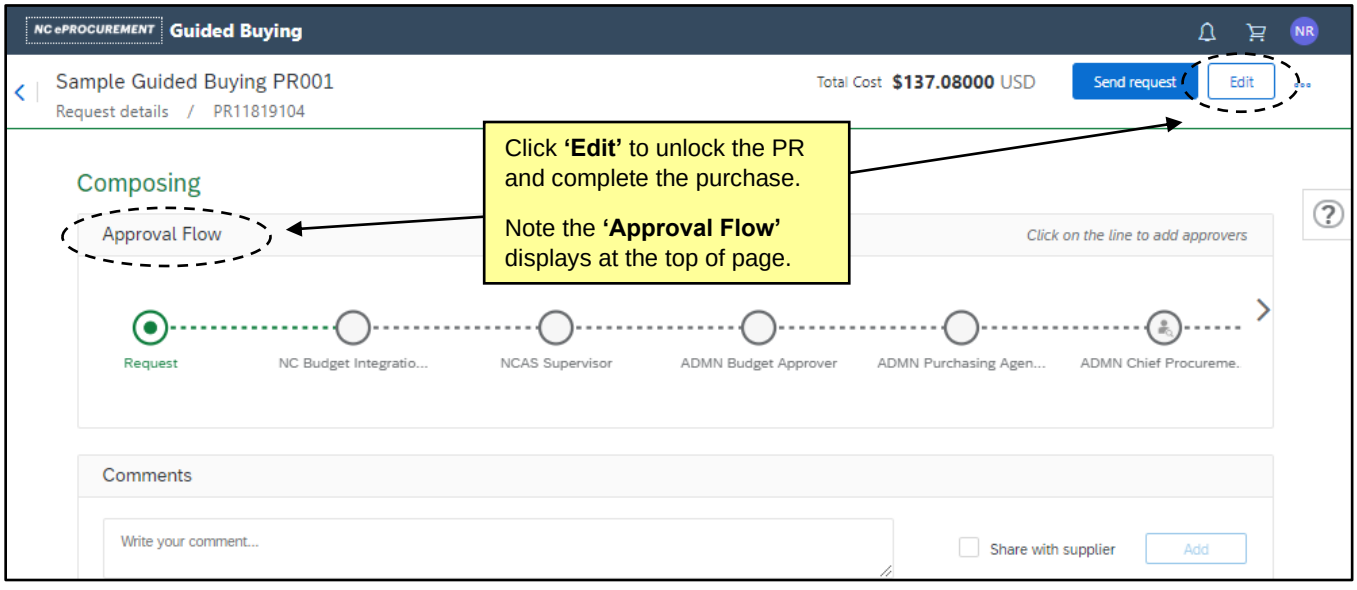
1. Click on the **'Composing'** PR within **'Recent requests'** or on the '**Your Requests'** tab.

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 PR. The user will have three options to choose from at the top of the page.

3. **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.

4. **Edit:** Unlocks the PR 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 PR, and **'Delete'** will remove it from the system.



III. Withdrawing Purchase Requisitions in Submitted Status

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.'**

a. Expert View

1. 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.

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. **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.

4. **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.

5. **Print:** Generates the print summary of the **'Submitted'** PR.

Note: 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.

b. Guided Buying

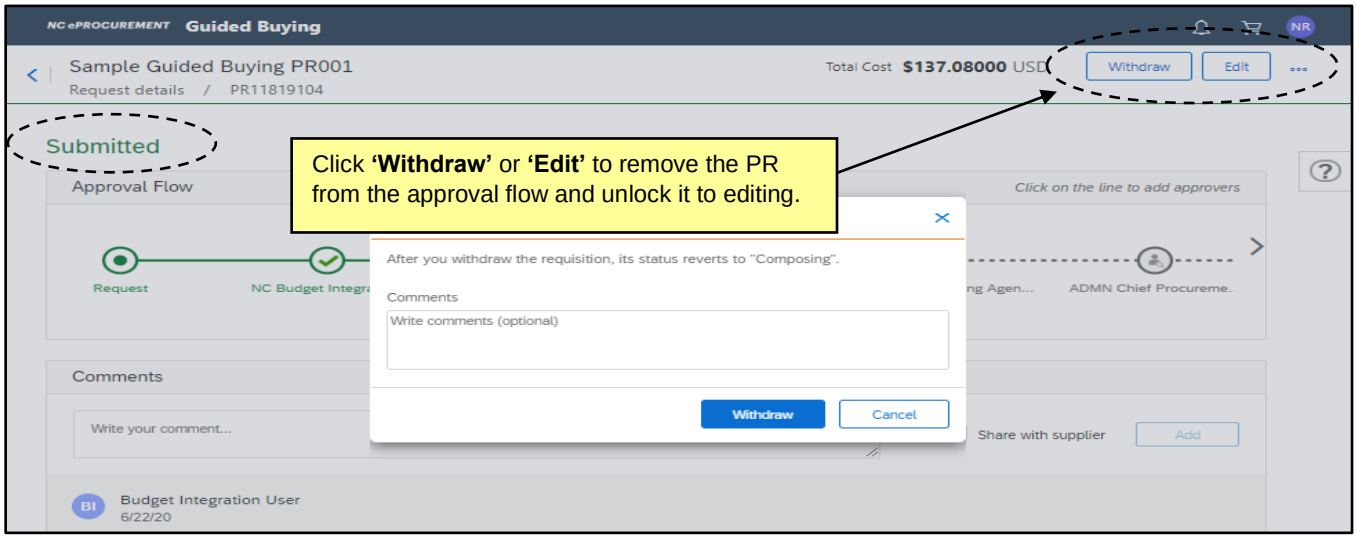
1. In Guided Buying, click on the **'Submitted'** PR within **'Recent requests'** or on the '**Your Requests'** tab.

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 PR. 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 PR 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 PR 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 PR, and **'Delete'** will remove it from the system.

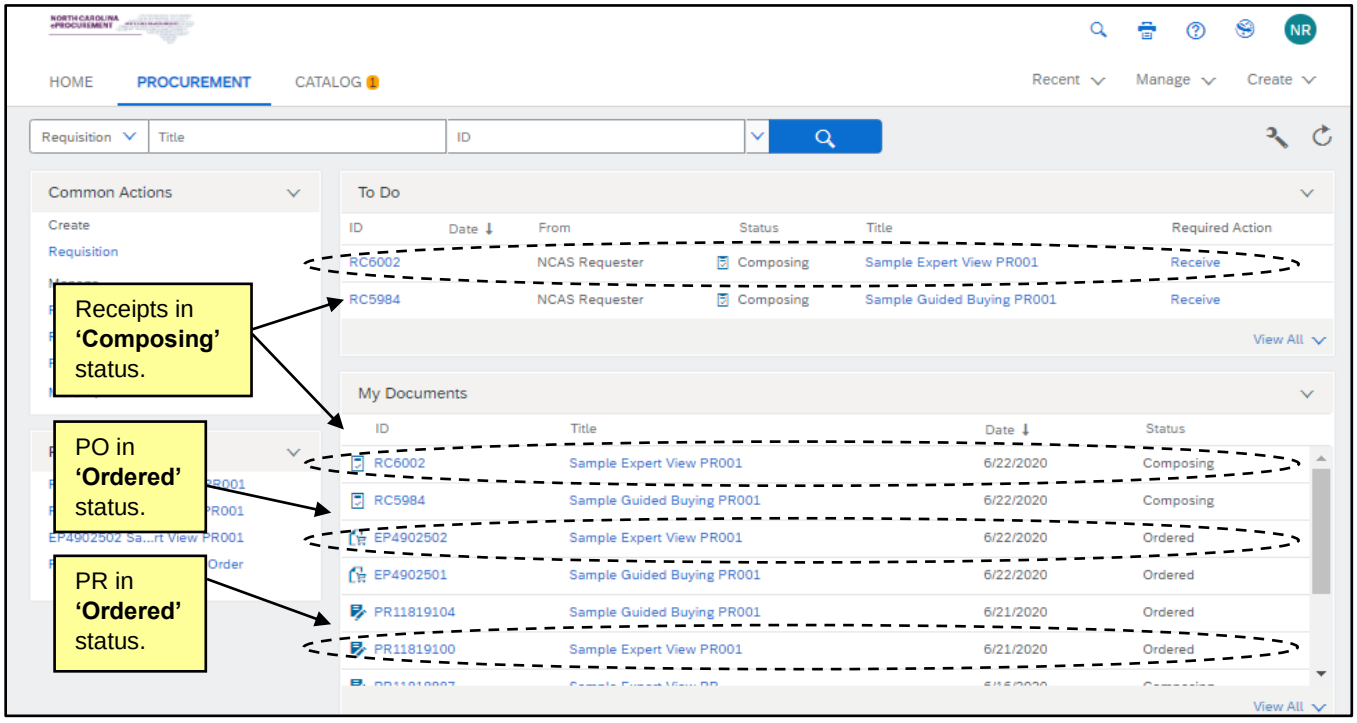


IV. Fully Approved Purchase Requisitions

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

a. Expert View

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.



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.

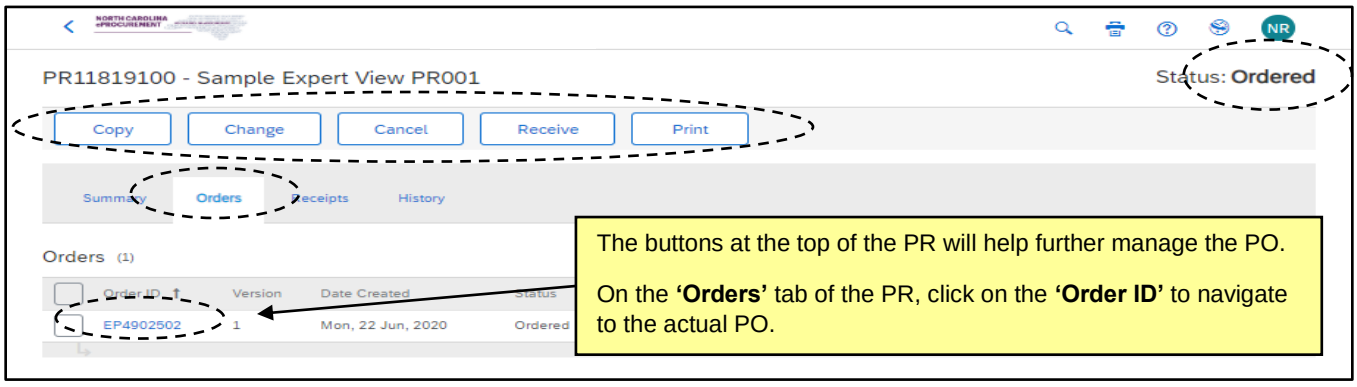
5. **Receive:** Click to begin the process of receiving against the order. The specifics of this process are covered in another process guide.

6. **Print:** Generates the print summary of the **'Ordered'** PR.

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.



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.

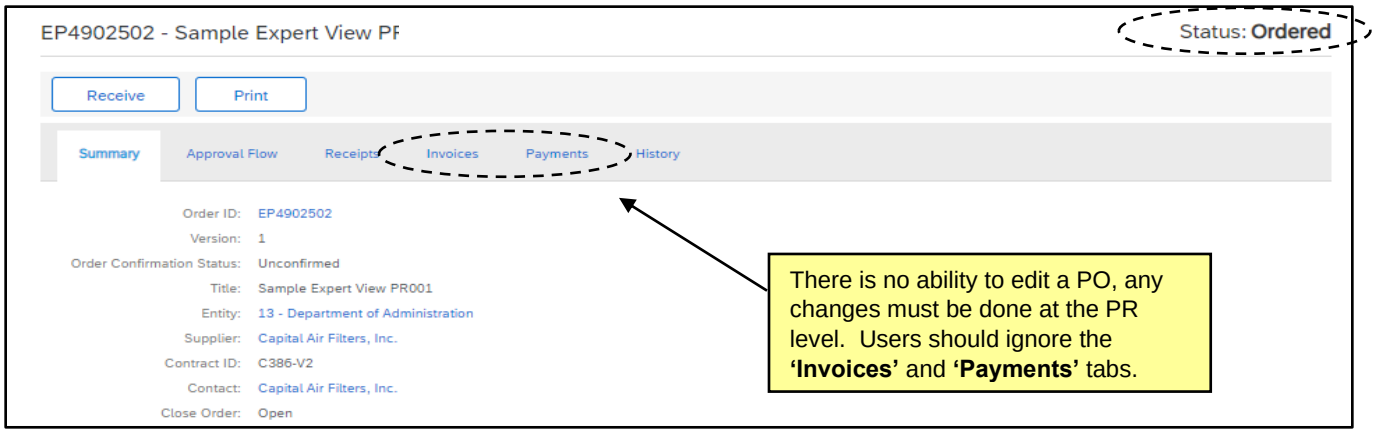
12. The **'Approval Flow'** tab can be ignored, as all approvals are done at the PR level.

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.



b. 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, 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 PR.

1. In Guided Buying, click on the **'Ordered'** PR within **'Recent requests'** or on the '**Your Requests'** tab.

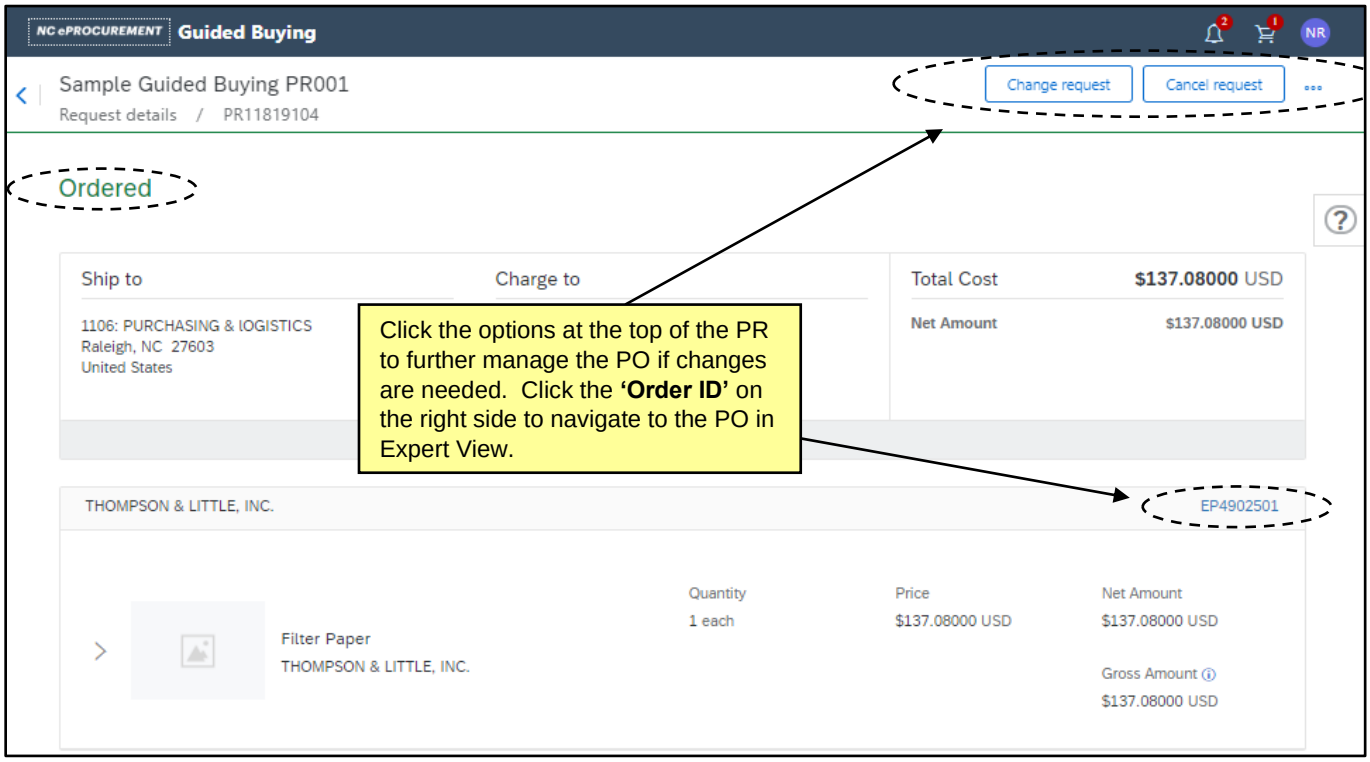
2. The **'Request details'** page will display, and the user will have three options to choose from at the top of the page.

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 PR.

6. The PO **'Order ID'** 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.



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 Purchase Requisition (PR) 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 NCAS. Creating a change to an order closed to invoicing will cause the order to fail when the change order is sent to NCAS. 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 PR's approval flow when certain fields are updated. Encumbrance does not take place in NCAS until the final approval occurs in NC eProcurement. Users should check their entity's policies prior to making changes to a PR.

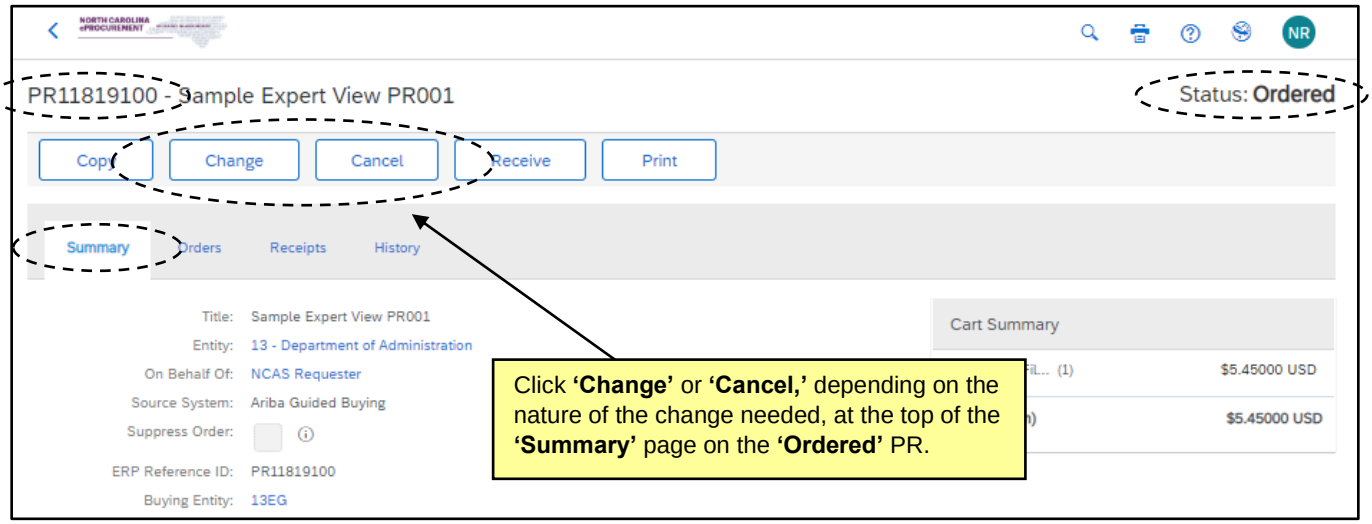
a. Expert View

1. In Expert View, find the PR associated with the PO that needs to be changed. This can be done by accessing the PR from the **'My Documents'** Portlet or by using the **'Search'** bar.

2. Click on the PR **'ID'** or the **'Title'** of the PR to display the **'Ordered'** PR's **'Summary'** tab.

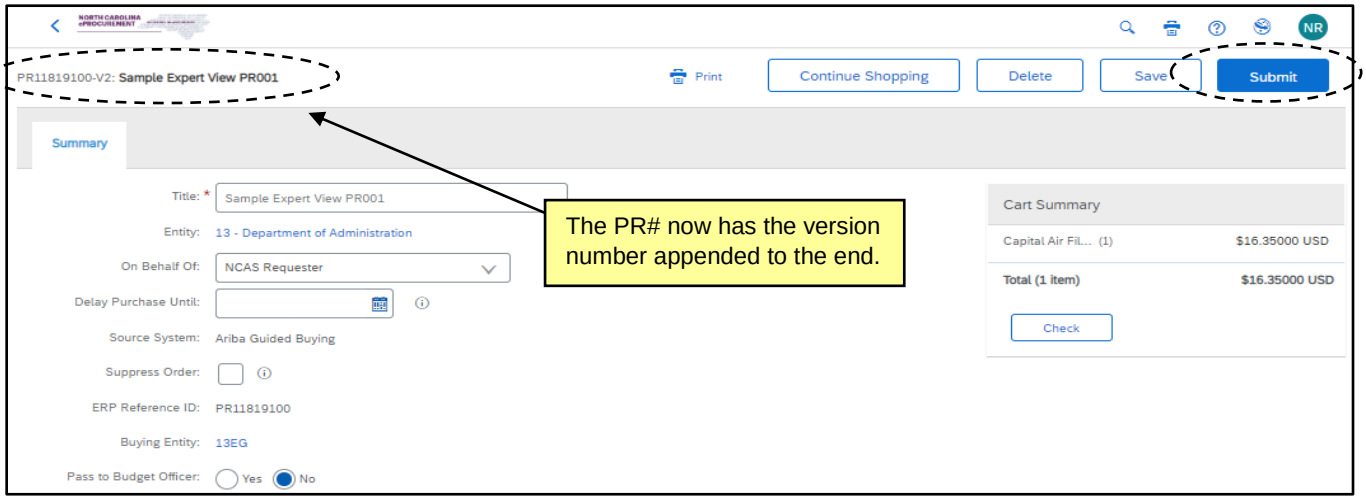
3. Click the **'Change'** button to initiate a change to the PR. If the **'Change'** button does not appear, the order may be closed for changes.

   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.



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

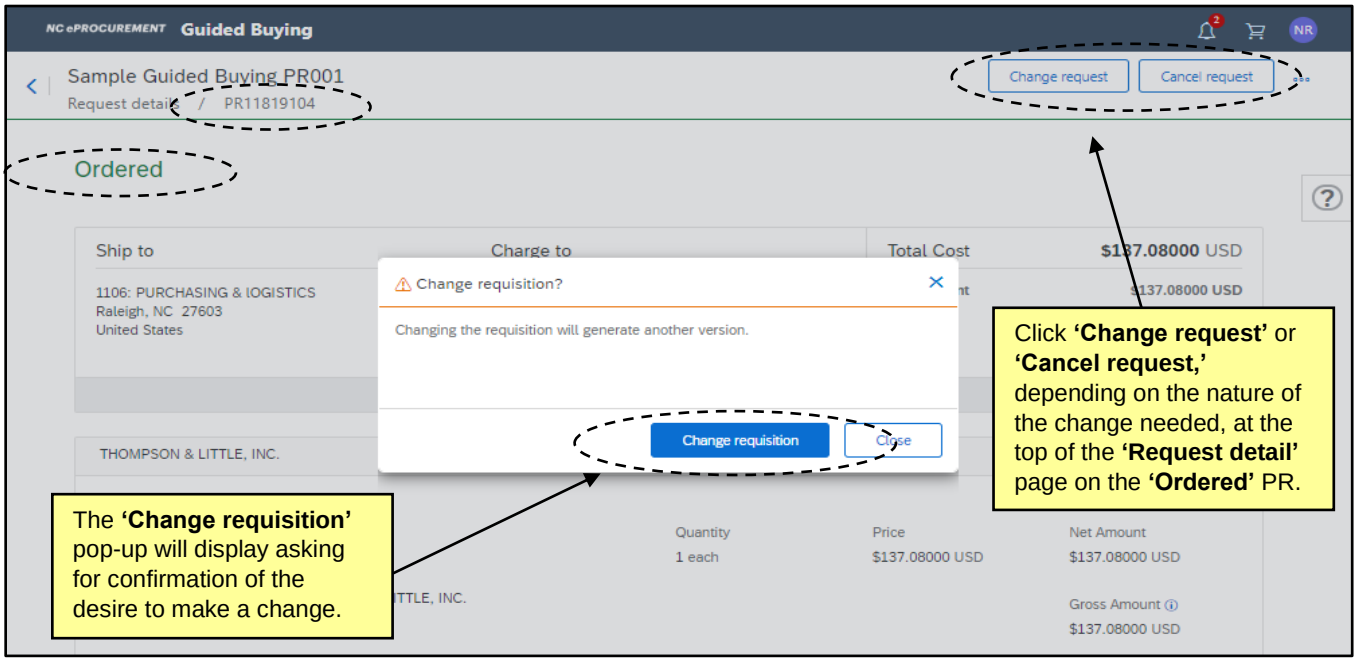
   Note: The PR# is now appended with a version number (in this case **'-V2'**). Once submitted, the new version will appear in **'Submitted'** status in the **'My Documents'** portlet, and if necessary, the approval flow will be retriggered to approve the change before it is sent to the supplier.



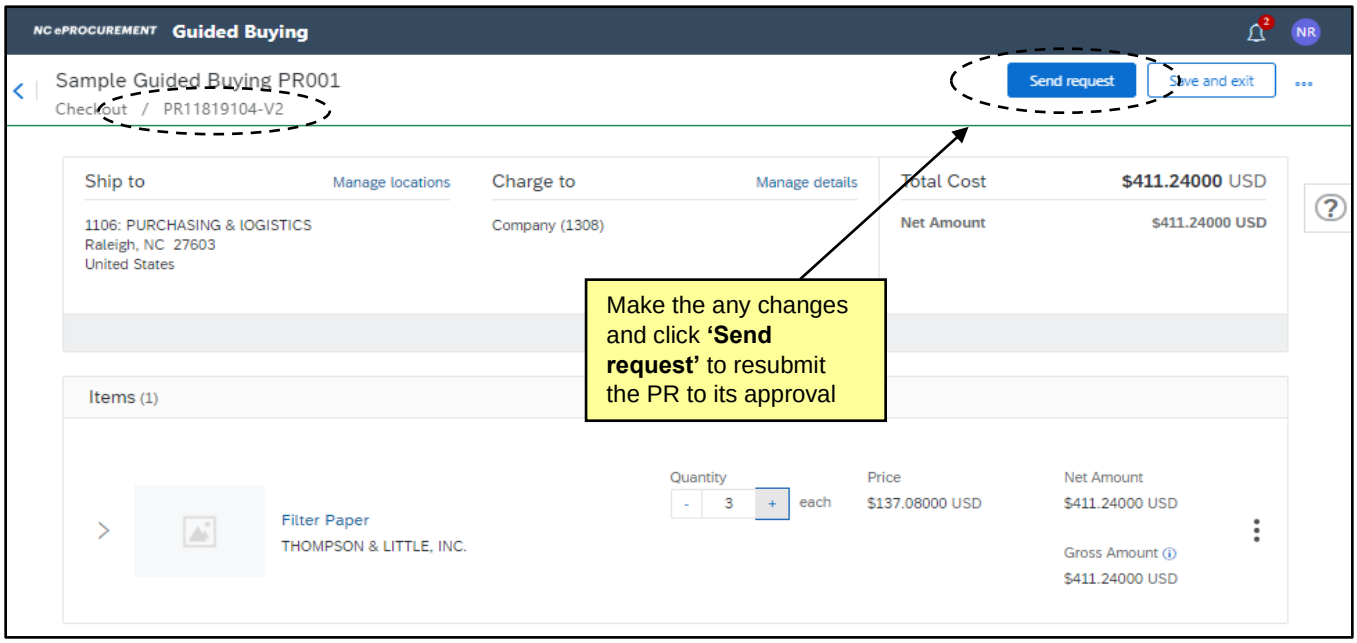
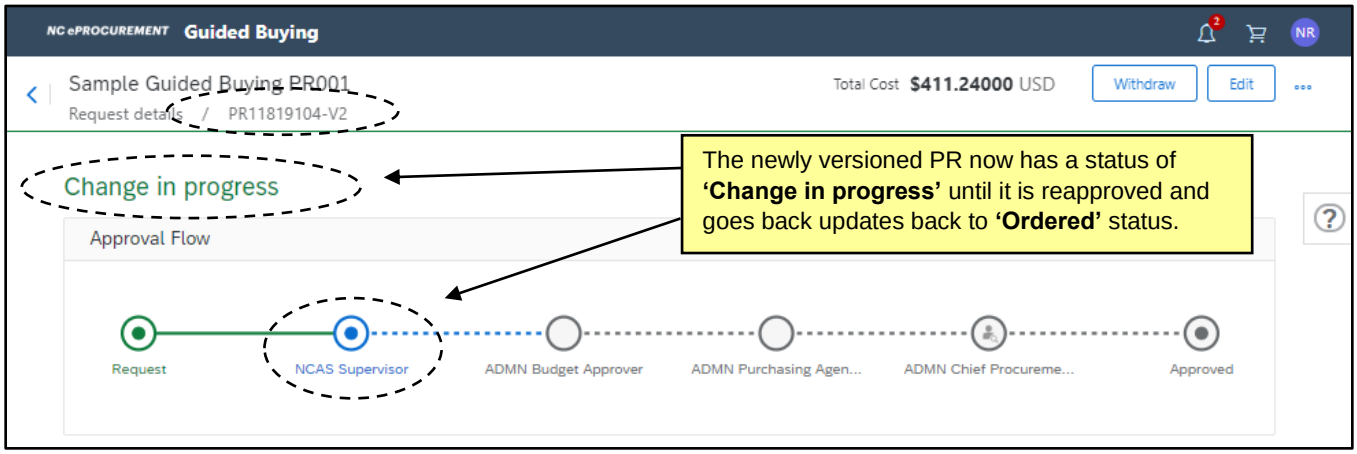
b. Guided Buying

1. In Guided Buying, click on the **'Ordered'** PR 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.



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



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