

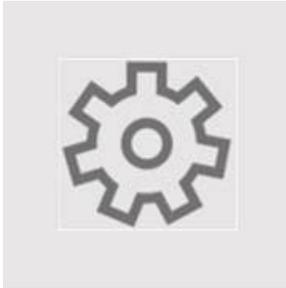
# THE SOURCE

STATE DEPARTMENT STATE BRANCH  
LOCAL GOVERNMENT CITY COUNTY  
COMMUNITY COLLEGE PUBLIC SCHOOL  
**NORTH CAROLINA ePROCUREMENT PURCHASE**  
ONLINE SHOPPING STATEWIDE TERM CONTRACT  
ELECTRONIC VENDOR PORTAL HUB CERTIFIED VENDOR  
QUOTE PUNCHOUT CATALOG  
PURCHASE ORDER  
SOURCING  
BIDDING  
BUY

## NC eProcurement Monthly Newsletter

August 2021 Edition

### TOP STORIES IN THIS NEWSLETTER



Tips and Tricks: Filtering and Saving Searches



Contracts Tips and Tricks: Template Selection



Training Roundup

### TIPS AND TRICKS: FILTERING AND SAVING SEARCHES

When searching for items in NC eProcurement, filters can quickly narrow down the search results. All filters on the **'Search'** page can be turned on or off using the **'Search Options'** drop-down menu. One filter that is commonly turned off is **'Date Created,'** which by default will return results from the last 15 days only. To always see items regardless of the date created, uncheck the box beside **'Date Created'** in the **'Search Options'** drop-down menu.

To turn off the **'Date Created'** field:

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

Change the search criteria or name, and then Search.

**Search Filters** Search Options ▾

Title:

ID:

Buying Entity: (no value) [select]

Bypass Approval Flow:  Yes  No  Either

Commodity Code: (select a value) [select]

Date Created: Custom ▾

From: Fri, 23 Jul, 2021

To: Fri, 6 Aug, 2021

FOB Code: No Choice ▾

Override Funds:  Yes  No  Either

Requester: (select a value) [select ▾]

Request Fund Exception:  Yes  No  Either

Status: No Choice ▾

Supplier (any line item): (No Preference) [select]

Total Cost: From:  To:  USD ▾

2. Uncheck the **'Date Created'** option on the menu.

Change the search criteria or name, and then **Search**.

### Search Filters

Title:

ID:

Buying Entity: (no value) [select]

Bypass Approval Flow:  Yes  No  Either

Commodity Code: (select a value) [select]

Date Created: Custom

From: Fri, 23 Jul, 2021

To: Fri, 6 Aug, 2021

FOB Code: No Choice

Override Funds Exception:  Yes  No  Either

Requester: (select a value) [select]

Request Fund Exception:  Yes  No  Either

Status: No Choice

Supplier (any line item): (No Preference) [select]

Total Cost: From:  To:  USD

Collaboration

Commodity Code

Date Approved

Date Created

Date Ordered

Date Received

Date Submitted

Delay Purchase Until

Description (any line item)

Entity

FOB Code

Has Inventory Items

ID

Is Team Received

Is Team Requisition

Need-by Date (any line item)

Search

- The **'Date Created'** field should no longer appear in the Search Filters section. This same method can be used to add or remove any search filters as needed.

If a specific filtered search is commonly used, save it so that the filters don't have to be added manually every time the search is needed in the future. To save a search, select the **'Save Search'** button on the bottom right, and then provide a name for the search on the **'Save Search'** page.

**Note:** Do **not** select the **'Save as Shared Search'** checkbox. This will create a public search that will be seen by all users across the state.

OK Cancel

Save the search to use again at a later time. If you have the required permission, you can save the search as a system search for use by all users.

Search Name:

Search Category: Requisition

Search Filters: Date Created between Fri, 23 Jul, 2021 and Fri, 6 Aug, 2021

Save as Shared Search.

After naming the search, click the **'OK'** button and the new saved search will appear on the Search Results screen on the left.

### Requisition

[View All](#)

▼ My Labels

No Items

▼ My Saved Searches

Sample Saved Search

Change the search criteria or name, and then **Search**.

Saved Search: Sample Saved Search

Date Created: From: Fri, 23 Jul, 2021

To: Fri, 6 Aug, 2021

## CONTRACTS TIPS AND TRICKS: TEMPLATE SELECTION

When creating a Contract Workspace, it is important to select the correct template. Template selections will display at the bottom of the **'Create Contract Workspace (Procurement)'** page only after the **'Entity'** field is populated.

By default, the **'Legacy Migration Template'** will be selected as shown below, but it is very important to select **'Agency Contract Process'** instead:

Select a template

Select the template you want to use, and answer any questions related to it to create your project. How you set the fields in the section above might affect which [More](#)

Agency Contract Process

*Term Contract Agency Specific:*

- A contract generally intended to cover all normal requirements for a commodity or service for a specified period of time based on estimated quantities for a single entity. It would be considered a master agreement for use by a specific agency. An agency would execute this contract type when there is a recurring need over a period, but the quantity required for each event is inconsistent or not-easily estimated. This would be the same as a STC but at the agency level.

*Agency Contract:*

- A spot-buy (nonrecurring) procurement either conducted by the agency or P&C, depending on contract amount.

Legacy Migration Template

*Template to be used for Legacy Migration of Contracts*

[Create](#) [Cancel](#)

After the **'Agency Contract Process'** template has been selected and all other mandatory fields have been entered – including the questions that appear below the template selection – the **'Create'** button can be clicked and the Contract Workspace will be generated in **'Draft'** status.

Select a template

Select the template you want to use, and answer any questions related to it to create your project. How you set the fields in the section above might affect which [More](#)

Agency Contract Process

**Term Contract Agency Specific:**

- A contract generally intended to cover all normal requirements for a commodity or service for a specified period of time based on estimated quantities for a single entity. It would be considered a master agreement for use by a specific agency. An agency would execute this contract type when there is a recurring need over a period, but the quantity required for each event is inconsistent or not-easily estimated. This would be the same as a STC but at the agency level.

**Agency Contract:**

- A spot-buy (nonrecurring) procurement either conducted by the agency or P&C, depending on contract amount.

---

Is this a Contract for Goods or for Services?  ▼

Is this an IT Contract?  ▼

---

Legacy Migration Template

Template to be used for Legacy Migration of Contracts

For more information about Contracts, see the [Contracts](#) Training Page.

## STATEWIDE TERM CONTRACT ANNOUNCEMENT

### Statewide Term Contract 9212A Data Breach & Credit Monitoring Services

The Division of Purchase & Contract has established a new Statewide Term Contract 9212A Data Breach and Credit Monitoring Services. This is a single vendor convenience contract that may be used by state agencies, departments, institutions, universities, and community colleges that are allowed by North Carolina General Statute. Additionally, non-mandatory entities including schools and local governments that are allowed by North Carolina General Statute may use this contract. The contract term is August 13, 2021 through February 22, 2022. If you have any questions related to this contract, contact Bahaa Jizi at 984-236-0218 or [Bahaa.jizi@doa.nc.gov](mailto:Bahaa.jizi@doa.nc.gov).

## TRAINING ROUNDUP

The Division of Purchase & Contract (P&C) and NC eProcurement offer various training courses related to procurement throughout the year. Please see the following table for a list of upcoming courses. 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!

DATE	COURSE TITLE
8/31	NC eProcurement Contracts Training

9/2	NC eProcurement NCAS Basic Requester Training
9/15	NC eProcurement Collaborative Requisitioning Training
9/21-22	Request for Proposals (RFP) Development and Evaluation
9/22	NC eProcurement NCAS Basic Requester Training
9/23	NC eProcurement NCAS Advanced Buyer Training
9/28	Demystifying Terms and Conditions
9/29	NC eProcurement Contracts Training
10/5-6	Introduction to Procurement

*This newsletter was sent to **NCAS users**. Questions about information covered in this newsletter? Send an email to [ephelpdesk@its.nc.gov](mailto:ephelpdesk@its.nc.gov).*