

THE SOURCE

STATE DEPARTMENT STATE BRANCH
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NC eProcurement Monthly Newsletter

August 2021 Edition

TOP STORIES IN THIS NEWSLETTER



Tips and Tricks: Filtering
and Saving Searches



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 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 ▾

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

3. 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.

Save Search **OK**

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

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.

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
9/14	NC eProcurement EPLite Basic Requester Training
9/14	NC eProcurement EPLite Approver Plus Training
9/21-22	Request for Proposals (RFP) Development and Evaluation
9/28	Demystifying Terms and Conditions
10/5-6	Introduction to Procurement

*This newsletter was sent to **EPLite users**. Questions about information covered in this newsletter? Send an email to ephelpdesk@its.nc.gov.*