

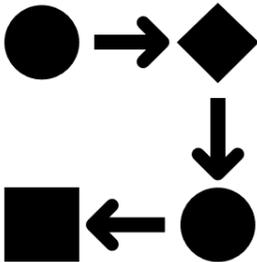
# THE SOURCE



## 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.

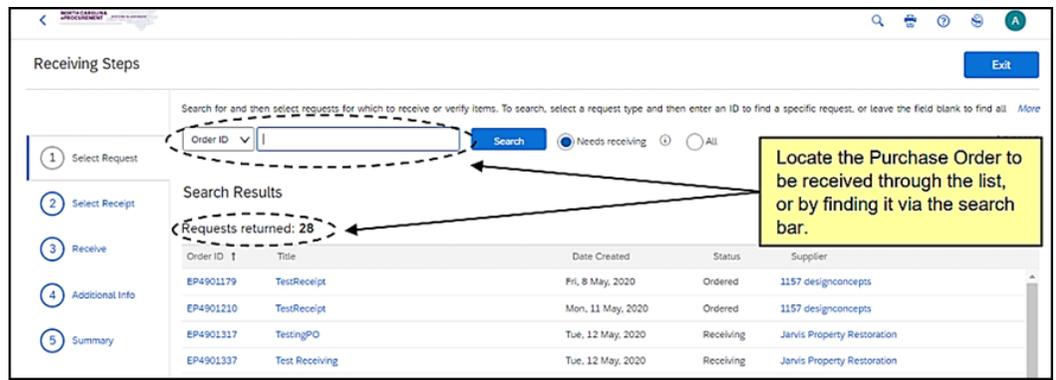
**Option 3:** Locate the Purchase Order in the 'To Do' portlet.

**Option 4:** Locate the Purchase Order in the 'My Documents' portlet.

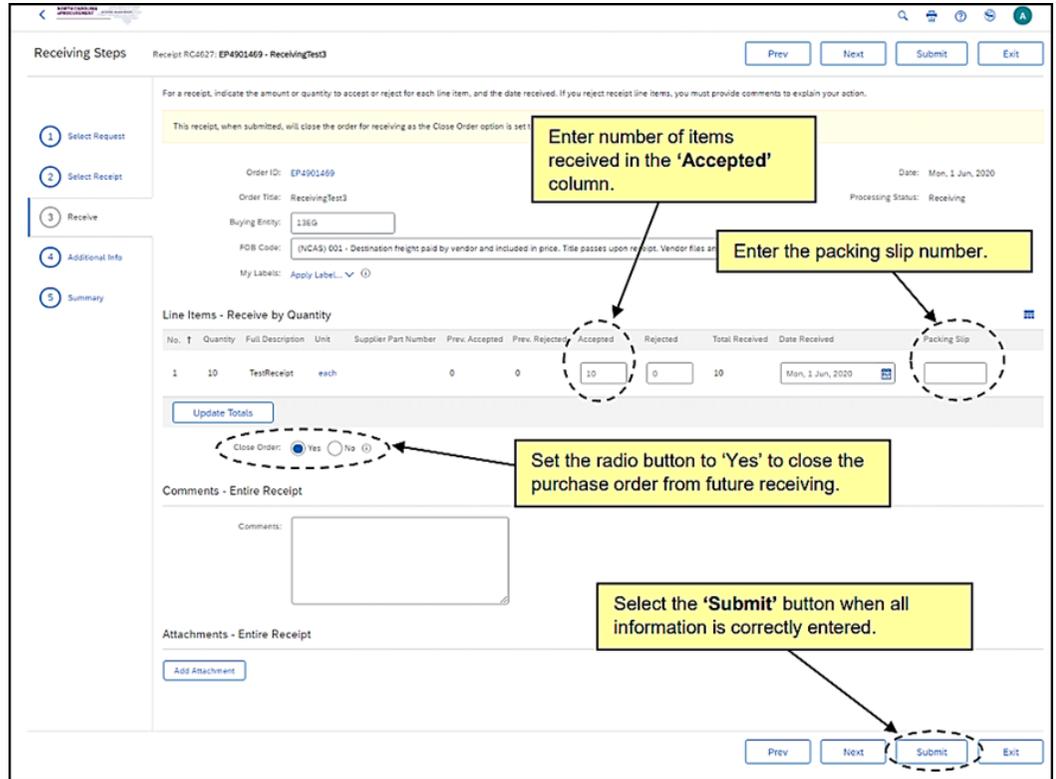
ID	Date	From	Status	Title	Required Action
PR11817310-V2	5/20/2020	ADMIN Requester	Ordered	Test123	Watch
PR11817296	5/19/2020	ADMIN Requester	Ordered	Copy of Openbook Test	Watch
PR11810671	2/26/2020	ADMIN Requester	Ordered	Copy of 2.2_ARRA_1	Watch
13900-V2	1/8/2020	ADMIN Requester	Ordered	Copy of DoA Rewards and Recognition Awards	Watch
1813054	3/24/2020	ADMIN Requester	Ordering	Beacon with Bacon	Watch
1813055	3/24/2020	ADMIN Requester	Received	1A Smart Start, LLC	Watch

ID	Title	Date	Status
PR11818005	Test Requisition	5/29/2020	Submitted
PR11817993	Test	5/29/2020	Submitted
PR11817804	Test	5/27/2020	Submitted
EP4901828	Test	5/27/2020	Ordered

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.'**

The screenshot shows a form with the following steps and callouts:

- 2. Select Approvers: A callout points to the 'Approval Rule Flow Type' dropdown, which is set to 'Custom'. A note above it says '(PQ value)'.
- 3. Specify Due Date: A callout points to a date picker field.
- 4. Provide an initial message and click Submit or Mark Cancelled: A callout points to a text area with a rich text editor toolbar.
- 5. Additional Attachments...: A callout points to the 'Submit' button.

A yellow callout box contains the text: "Click on 'Custom' to add a P&C Service Team as an approver, select a 'Due Date' from the date-picker, add a message if desired. The 'Submit' button to send the approval request to P&C will only appear after the Sourcing Event has been initiated."

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.



## 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.

The screenshot shows the search filters page with the 'Search Options' menu open. The 'Date Created' filter is highlighted with a red box. The 'Search Options' menu is also highlighted with a red box. The 'Date Created' filter is currently set to 'Custom' and shows a date range from 'Thu, 23 Jun, 2022' to 'Thu, 7 Jul, 2022'. The 'Search Options' menu is currently set to 'Search Options'.

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

Change the search criteria or name, and then Search.

**Search Filters**

Order Title:

Buying Entity: (no value) [ select ]

Bypass Approval Flow:  Yes  No  Either

Close Order:

Date Created:

From:

To:

- Date Created
- Date Ordered
- Date Received
- Entity
- Order Method
- Pass To Budget Officer
- FOB Code
- Is Subcontractor
- Order Confirmation Status
- Order ID
- Order Method
- Order Title
- Pass To Budget Officer
- Preparer
- Receipt Date (any receipt)

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](mailto:wanda.simmons@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. 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!

August 30	•NC eProcurement NCAS Basic Requester Training
August 31	•NC eProcurement Advanced Buyer Training
September 14	•NC eProcurement Collaborative Requisitioning
September 21	•P&C Request for Proposals (RFP) Development and Evaluation
September 26	•P&C Demystifying Terms and Conditions
September 28	•NC eProcurement NCAS Basic Requester Training

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