



## North Carolina Procurement Transformation

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# NC E-Procurement Ariba Buyer Upgrade

January 2012



# Agenda

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- **Welcome & Introductions**

- **Ariba Buyer Upgrade**

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- System Test Updates & [New Functionality]
- Master Data
- Historical Data Approach
- Communications Activities

Shireen Sackreiter

Michael Jackman

Scarlett Swain

Bryan Doepken

Jeff Harper

Laura Haakenson

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# Welcome & Introductions

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**Jocelyn Thornton**

**Procurement Transformation Director**



## New Implementation Timeline

“Thank you for your continued support and encouragement of this effort....”

- Anne Bander

- The Implementation timeline has been moved to the **start of the new fiscal year**
- What are we doing in the interim?
  - Enhanced training
  - Online training development
  - Issue resolution
  - Go-Live Readiness Preparation





## NCID Interface Status Update

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### Single point of administration and control for simplified management and standardized processes for the State, agencies, end users, and customer applications

- NC E-Procurement team began sending NCID User Mapping Sign Off communications to confirm NCID mappings or to establish new NCIDs.
  - All **community colleges** should have received the request with a requested return date of November 23<sup>rd</sup>. To date, we have received **41%** (24/58) completed spreadsheets. We are following up with the Community Colleges who have not responded over the phone.
  - All **school systems** have received the request. To date, we have received **31%** (36/115) completed spreadsheets. We will begin following up with school systems who have not responded yet over the phone in the coming days.
  - All **State Agencies** should have received the request with a requested return date of January 27<sup>th</sup>. To date, we have received **21%** (12/57) responses from State Agencies.
- The NCID interface is actively being tested as part of the upgrade system test process.
  - The NC E-Procurement 9r1 system is integrated with an NCID test instance to verify user updates and authentications work as expected.



## System Test Updates

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**The Ariba Upgrade team will execute 3 passes of system testing to test Base Functionality, Enhancements, Integration, Batch, and Scripting.**

- Completed 2 passes of System Testing
- Currently mid-way through Pass 3 of System Test
  - Full end to end testing (integration, batch, scripts, monitoring etc.)
  - Tested ~40% of conditions with a **92% pass rate**
  - Continually resolving and retesting issues found during testing
  - Working to test each integration touch point during this pass



# New Functionality Highlights

**Users can search for any transaction directly from the Home Dashboard. My Labels will be used to organize transactions.**

The screenshot displays the Ariba Spend Management Home Dashboard. The top navigation bar includes 'Home', 'Help', and 'Logout'. The main dashboard area is divided into several sections:

- Common Actions:** Includes 'Create' (eRequisition, UserMaintenance, AddressMaintenance) and 'Manage' (Receive, Administrator, Reports).
- Search:** A search panel with a 'Catalog' dropdown, an 'ID:' input field, and a 'Search' button. Below the search field, 'My Labels' are listed: Archive Items (3), Food Services Department (1), and Library (1). This section is highlighted with a red dashed circle.
- Recently Viewed:** Lists recent transactions: PR294 Untitled Requisition, PR299 Untitled Requisition, PR290 Untitled Requisition, and EP39-V5 itam test 123.
- To Do:** A table of pending tasks.
- My Documents:** A table of documents.

ID	Date ↓	From	Status	Title	Required Action
PR342	1/19/2012	Wade Quinn	Pending	chief pro	<a href="#">Approve</a>
UP36	1/4/2012	CatalogBrowser	Submitted	User Profile Changes for CatalogBrowser	<a href="#">Approve</a>

  

ID	Title	Date ↓	Status
PR358	Untitled Requisition	1/19/2012	Composing
PR299	Untitled Requisition	1/19/2012	Composing
PR297	Untitled Requisition	1/19/2012	Composing



# New Functionality Highlights

Users will be directed to the Catalog Home page when creating requisitions. The Catalog Navigation Panel allows users to quickly refine search results.

The screenshot displays the Ariba Spend Management interface for creating a requisition. The page title is "PR353: Untitled Requisition". The interface includes a navigation bar with "Home", "Procurement", "Create", "Search", "Manage", "Recent", and "Preferences". A "Supplier" list is visible on the left, with a red dashed circle highlighting the "Catalog Home" section. The "Catalog Home" section includes a "Catalog" dropdown, a "Search" button, and a "Create Non-Catalog Item" button. Below this, there are several category tiles with icons and counts, such as "APPLIANCES, ELECTRICAL, CLOCKS (2)", "BUILDING MATERIALS, MAINTENANCE (2)", "CLOTHING & TEXTILE ITEMS (110)", "FURNITURE (OFFICE, EDUCATIONAL AND HEALTH CARE) (1663)", "MEDICAL & LAB EQUIPMENT & SUPPLIES (7470)", "OIL & GAS (1)", "SERVICES (CONTRACTUAL & CONSULTANT) (830)", "TECHNOLOGY ITEMS (1455)", "TRANSPORTATION (VEHICLES & SUPPLIES INCLUDING MARINE) (41)", and "Uncategorized Items (8)". The page also shows a "Supplier Part #:" field, a "Contract ID:" field, and a "Commodity Code:" field. The bottom of the page displays "Local intranet | Protected Mode: On" and a "100%" zoom level.



## Master Data

**Key master data will be extracted from the current version and then transformed to load to the new version.**

- Key data elements **will** be moved with the new system:
  - Bill To Address
  - Ship To Address
  - Contracts, Bids, and Open Book Data
  - Suppliers and Catalogs
  - NCAS Accounting Elements
  - Payment Terms



## Master Data

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### User Data may be impacted by the transformation from the current version to Ariba 9r1

- User **Login IDs will be converted** to NCIDs per the worksheets you have been working with.
- In some cases, users have multiple NCEP accounts. Due to NCID each user will be **limited to only one account**. This may impact your entities' management chain. We will be working with you to resolve duplicate ID issues.
- Traditionally users have been assigned to Roles for both permissions and approval flow. Now Roles will be used to assign permissions and Groups will be used for the Approval flow. We will be automatically converting users to appropriate Groups and Roles.
- We will be **working with you** over the coming months to ensure a smooth transition of user data to the new system.



## Historical Data Approach Guidance & Options for a Smooth Transition

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**The implementation date has been moved to the new fiscal year. This decision will assist school systems in achieving a smooth transition with minimal interruptions.**

- EPLite transactions will **not need to be closed or re-entered** due to the implementation of the new system as the transactions remain available in the backend systems.
- The primary **impact** and concern is related to the **Change and Cancel orders**.
  - Because the transaction data is not being converted to the new E-Procurement system, change and cancel orders would not be recognized in E-Procurement.
  - The proposed solution is to implement a lookup to identify if a transaction had existed in the old E-Procurement system and handle the input accordingly.
  - The decision to move to the end of the fiscal year should minimize the transactions that may need to be changed or cancelled as open transactions are closed as part of the standard year end process.



## Historical Data Approach Fiscal Year End Process

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### Working with the schools to confirm year end processes and approach.

- EPLite entities attempt to complete and/or close all of their transactions before the end of the fiscal year.
- Transactions that were closed as part of the year end process but were still ‘open’ are either re-entered in the new fiscal year, or paid directly if they are invoiced after the original PO is closed.
- Some transactions may need to stay open across fiscal years:
  - These consist primarily of orders related to long term projects (such as construction) and other capital transactions.
  - These purchase orders are closed prior to the end of the fiscal year. **New orders are entered in the backend system and are given the same purchase order number** as the closed PO. The new purchase order only contains the remaining amount of the original order.



## Communications Activities

Communications are increasing. Distribution of announcements for the entire user community has begun.

- Distributed “The Source” newsletter in December and January to **all** NC E-Procurement users
- Newsletter provides highlights of new features and current topics
- January issue included an announcement of the go-live date change to July 2012

**GO-LIVE DATE CHANGE**

Based on the feedback we have received from several of our users, we are able to move the upgrade go-live date from March 2012 to July 2012. More information about this change will be discussed in our next Agency Briefing Sessions.

**WHAT'S BEEN ACCOMPLISHED**

The NC E-Procurement Upgrade team has completed Pass 2 of system testing. We have started Pass 3 of system testing that includes full integrations with systems external to NC E-Procurement. The functional team has also wrapped up approval flow discussions with each entity so that these configurations can be tested in Pass 3.

**Requisitioning Made Easier**

The upgraded NC E-Procurement system improves requisition creation. The 'Create eRequisition' wizard will no longer be used to create a new requisition. As mentioned in last month's newsletter, a requisition can be created directly from the dashboard style homepage. By creating directly from the dashboard, you will encounter less steps to submit a requisition. While creating a new requisition, you will also notice several enhancements including the ability to add and delete comments that you created. Today, you would need to contact your agency's purchasing agent or the NC E-Procurement Helpdesk to remove unwanted comments. Another enhancement you will see is increased information on the History tab of the requisition. In addition to requisition approvals and changes to requisitions, you will also see when comments and attachments are deleted from a requisition providing an enhanced audit trail.

**Catalog Enhancements**

With the upgrade of NC E-Procurement, you will find that searching in the State Term Contract Catalog will be easier and provide more accurate results. For example, when you execute a search for the word "battery," the search results will include items containing the word "battery" and "batteries" in the description. Fuzzy searches will return exact and highly relevant matches even though the keyword(s) may be misspelled. Along with the improved search capabilities, you will find that comparing products within the State Term Contract Catalog will improve. Similar to many online retailers today, you will have the ability to run a side-by-side comparison of items you are wishing to purchase. Information like price, product description, manufacturer and lead time are included in the side-by-side comparison to assist users in purchasing items that better meet the needs of their agency.

**What's New: My Labels**

Today, you utilize Personal Folders in NC E-Procurement to organize requisitions for future access. In the upgraded system, Personal Folders will be replaced with "My Labels." My Labels will allow you to organize your requisitions, but will be accessed differently. During the requisitioning process, you will have the option to add a label to the requisition instead of waiting until the requisition is completed to move to a Personal Folder. To find a labeled requisition, users can use the Search portal on the dashboard. More information about My Labels will be included in upgrade training sessions.

**NC E-Procurement your service**  
www.ncgov.com

More information about [Procurement Transformation](#) and the [NC E-Procurement Upgrade](#) can be found on the web.

If you have questions or comments about information covered in this issue, please contact the NC E-Procurement Help Desk at [ephelpdesk@its.nc.gov](mailto:ephelpdesk@its.nc.gov).



# Communications Activities

Preparation for user training and job aid updates is underway.

- **“What’s New”** training presentation will be available to users
- **Job Aids** will be updated to reflect new functionality
- **Training environment** is being built out
- **Additional training sessions** will be provided as a result of the date change

The screenshot shows the NC E-Procurement website interface. At the top, there is a navigation bar with buttons for 'Buyer', 'Vendor', 'User Training', and 'Contact Us'. Below this, the 'Training Job Aids' section is highlighted. A sidebar on the left contains a menu with options like 'NC E-Procurement Home', 'Buyer Login', 'Vendor Login', 'Vendor eQuote Login', 'User Training', 'Training Materials', 'Frequently Asked Questions', 'Training Sites', 'E-Procurement eQuote', 'Instructor Led Training', 'Registered Vendor Search', 'State Term Contract Catalog Search', 'State Term Contracts Listing', 'News & Events', and 'Quick Links'. The main content area features a section titled 'Use the Quick Links Below:' with a list of links including 'System Navigation', 'eRequisitioning', 'Approving', 'Receiving', 'NC OpenBook', 'Reporting', 'Security Administrator', 'System Administrator', and 'Non-Integrated'. Below this list is a table titled 'System Navigation' with two columns: 'Course' and 'Audience'.

Course	Audience
E-Procurement Overview	All Users
System Searches	All Users
Personal Folders	All Users
Personal Profile	All Users
Delegating Approval Authority	All Users

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## Communications Activities

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**Overall readiness status will be gathered through a regular reporting process from entities using a Readiness Checklist .**

- The Readiness Checklist will allow entities to **report or confirm** their progress in several key areas:
  - In-Flight Transactions
  - Approval Flow Configurations (State Agencies)
  - NCID User Mapping
  - Commodity Code Update (School Systems and Community Colleges)
  - User Readiness/Training
- Weekly reporting is expected to **begin in May**
- Data already available to upgrade team will be provided to entities for review
- Upgrade team will hold **kick off sessions** with designated reporting contacts to review the process in advance



# Communications Activities

Continue to access the NC E-Procurement website for additional resources:

[eprocurement.nc.gov](http://eprocurement.nc.gov)

- New additions include **NCID FAQs** that were distributed to school systems and community college contacts and the **December 2011 Session Briefing** presentation

The screenshot shows the NC E-Procurement website interface. On the left is a navigation menu with links such as 'NC E-Procurement Home', 'Buyer Login', 'Vendor Login', and 'Buyer'. The main content area features a 'NC E-Procurement Upgrade' announcement, stating that the Ariba Buyer software is being upgraded to improve user satisfaction and business performance. Below this is a 'Resources' section with 'Session Briefings' and a list of topics including 'NCAS Agency S...', 'Community Coll...', and 'Local Education...'. A 'NCID Frequently Asked Questions' section is also visible, addressing common user concerns about NCID access and administration.



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*Questions?*