



April 2016
NC E-Procurement
ACCBO Spring Conference
Tips & Tricks





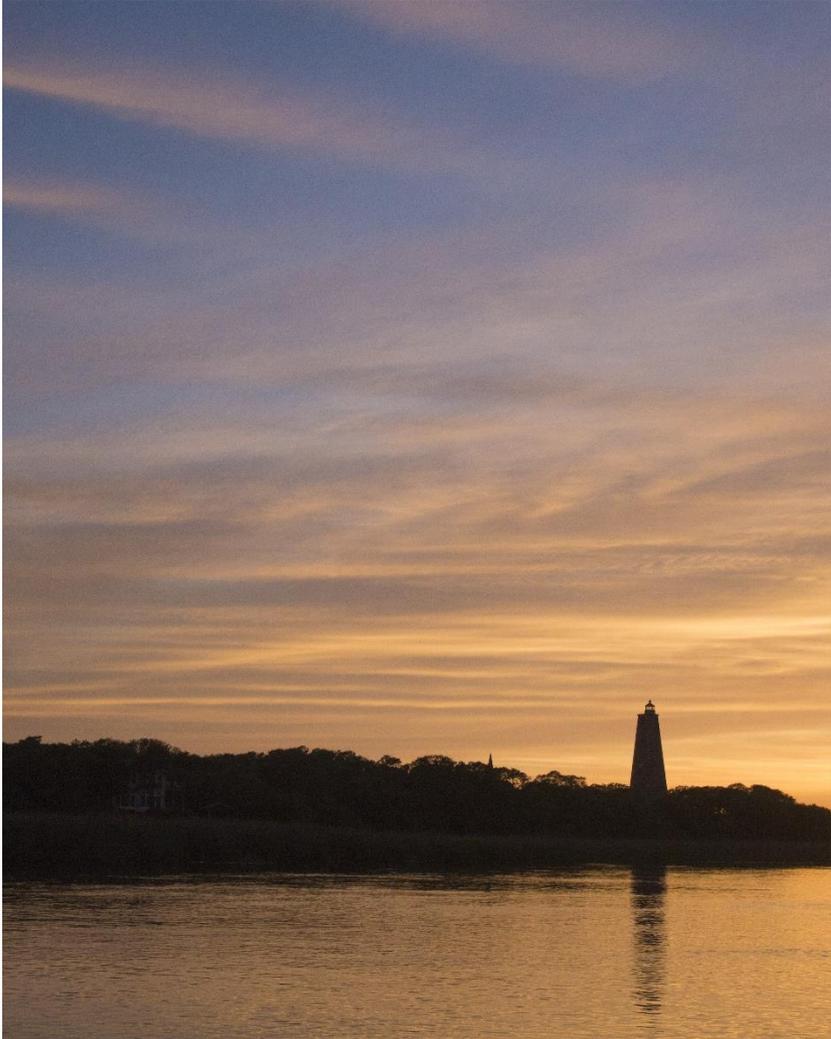
NC E-Procurement provides tools to improve the way the State of North Carolina purchases goods and services.

- Orders and internal approvals are routed electronically and maintained for accountability – encourages paper free purchasing!
- Users have access to a centrally maintained database of vendor information, including Historically Underutilized Business (HUB) certifications.
- Users can view the State term contract pricing within NC EProcurement through the catalogs and punchout catalogs.
- > 11,000 users across 174 entities
- > 5.2 Million purchase orders accounting for > \$33.4 Billion in total spend



NC E-Procurement Tips & Tricks

OVERVIEW



*How can you help
NC E-Procurement
help you?*

- You can **ORGANIZE** common or repeated actions for quick access
- You can **PERSONALIZE** your interactions with the system
- Additional Tips and Tricks

NC E-Procurement Tips & Tricks

ORGANIZE

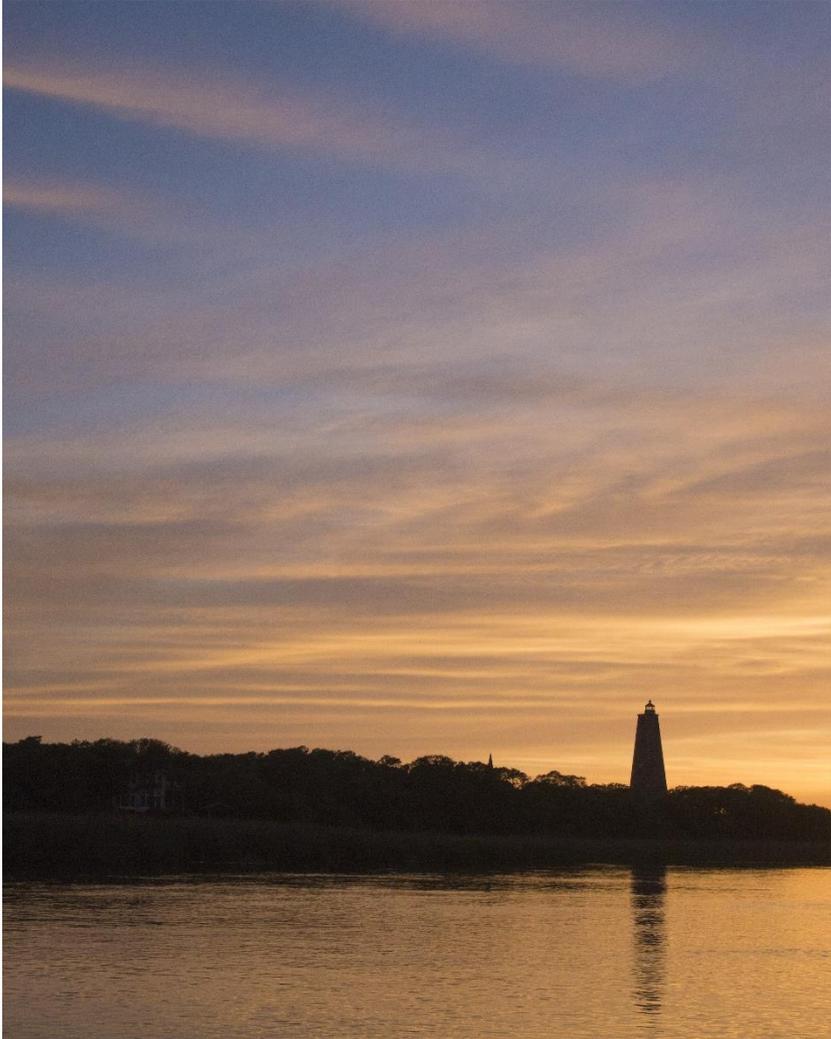
How can you ORGANIZE your NC E-Procurement experience in a better way?

- Saving System Searches
- Saving Catalog Searches
- Personal Labels
- Managing Open Requisitions



NC E-Procurement Tips & Tricks

ORGANIZE



Saving System Searches

NC E-Procurement Tips & Tricks

SAVING SYSTEM SEARCHES

The screenshot displays the NC E-Procurement system interface. At the top, the logo reads "NCE-Procurement @your service" and "ARIBA® SPEND MANAGEMENT". The user is logged in as "Welcome CC Requester 02". The navigation menu includes "Home", "Create", "Search", "Manage", "Recent", and "Preferences".

The "Search" section is active, showing a search type of "eRequisition". Below this, there are search filters and search options. The search filters include fields for Title, ID, Approved By, Commodity Code, Date Approved, Date Created, and Description. The search options include Entity, Legacy Document Id, Order ID, Requester, Status, Supplier, and Total Cost. A yellow callout box with the text "Click 'Save Search'" points to the "Save Search" button in the search options section.

The search results section shows "Found 2 items". A yellow callout box with the text "All search results meeting the criteria will be displayed" points to the search results table. The table has columns for Type, ID, Title, Status, Date Created, and Total. The results are as follows:

Type	ID	Title	Status	Date Created	Total
	RQ19493172	Bookshelf	Approved	Today, 5:53 AM	\$369.15000 USD
	RQ19493176	Office Chair	Submitted	Today, 6:09 AM	\$95.23000 USD



NC E-Procurement Tips & Tricks

SAVING SYSTEM SEARCHES

NCE-Procurement A R I B A® SPEND MANAGEMENT Home | Help | Logout
@your service Home Welcome CC Requester 02

Create Search Manage Recent Preferences

Save Search

Name your Saved Search

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 ...

Search Name: Saved Search Name

Search Category: eRequisition

Search Filters: Entity = CCCC, Requester = CC Requester 02, Supplier (any line item) = 101 Gardens

OK Cancel

OK Cancel



NC E-Procurement Tips & Tricks

SAVING SYSTEM SEARCHES

NC E-Procurement @your service **A R I B A®** **SPEND MANAGEMENT** Home | Help | Logout
Welcome CC Requester 02

Create Search Manage Recent Preferences

Home Dashboard

Configure Tabs Refresh Content

Common Actions

- Create eRequisition
- Manage Reports

Recently Viewed

- RQ19493176 Office Chair
- RQ19493172 Bookshelf
- RQ19493175 Fence Rebuild
- RQ19493174 Accident Clean Up

To Do

ID	Date ↓	From	Status	Title	Required Action
No items					

Search

Catalog ID:

eRequisition

Purchase Order

Receipt

User Profile

More...

My Saved Searches

- 101 Gardens (Furniture)

News

Read Past Issues of *The Source*

The Source newsletter contains timely information about NC E-Procurement activities.

Read past issues at http://eprocurement.nc.gov/Buyer/The_Source.html

Saved Searches will only appear if the specific **Type** of search is selected



NC E-Procurement Tips & Tricks

SAVING SYSTEM SEARCHES

The screenshot shows the NC E-Procurement system interface. The top navigation bar includes 'Create', 'Search', 'Manage', 'Recent', and 'Preferences'. The search sidebar on the left shows 'My Saved Searches' with '101 Gardens (Furniture)' selected. The main content area displays search criteria (Entity: CCCC, Requester: CC Requester 02, Supplier: 101 Gardens) and search results for two items: 'Bookshelf' and 'Office Chair'. A yellow callout box points to the '101 Gardens (Furniture)' search entry in the sidebar.

Search Results Table:

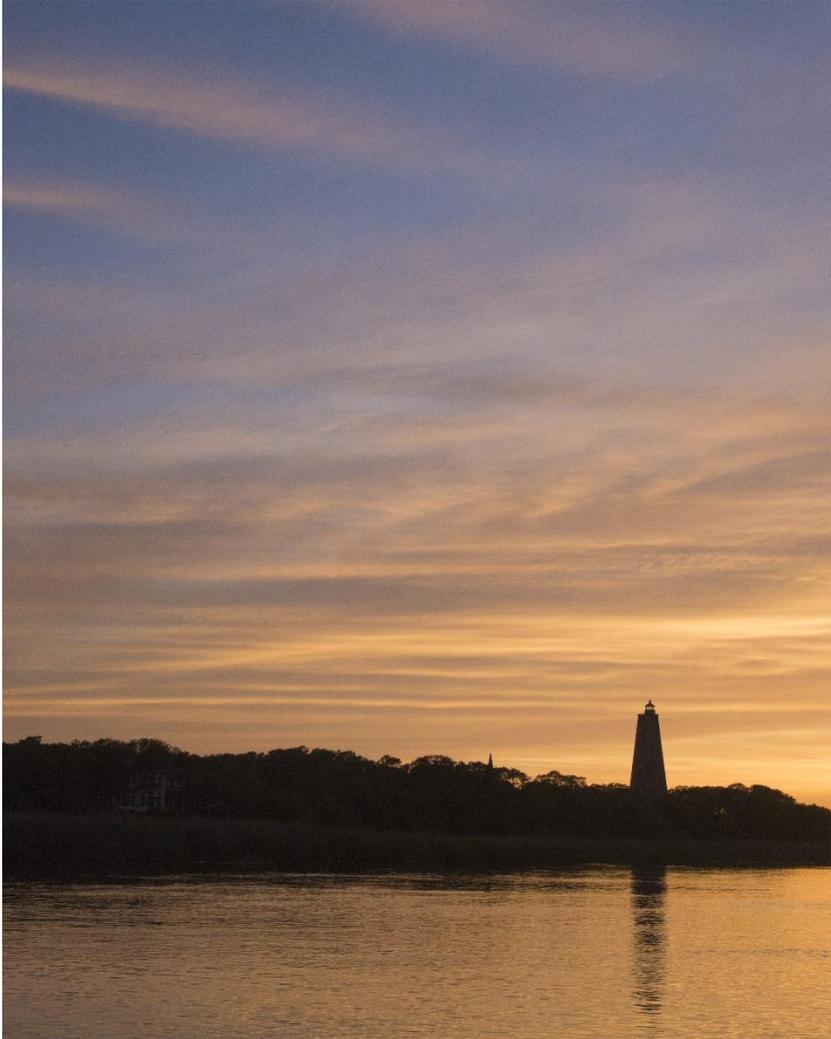
Type	ID	Title	Status	Date Created	Total
	RQ19493172	Bookshelf	Approved	Today, 5:53 AM	\$369.15000 USD
	RQ19493176	Office Chair	Submitted	Today, 6:09 AM	\$95.23000 USD

Saved Searches are listed here. Select the desired Saved Search and click 'Search' to execute the search.



NC E-Procurement Tips & Tricks

ORGANIZE



Saving Catalog Searches

NC E-Procurement Tips & Tricks

SAVING CATALOG SEARCHES

The screenshot displays the NCE-Procurement Ariba Spend Management interface. At the top, the navigation bar includes 'Home', 'Help', and 'Logout'. Below this, a secondary navigation bar contains 'Create', 'Search', 'Manage', 'Recent', and 'Preferences'. The main content area is titled 'Catalog Home' and features a search bar with 'Paper Husky' entered. To the right of the search bar is an 'Options' dropdown menu, which is open and shows a 'Save current search...' option. A dashed circle highlights this option, and an arrow points from a yellow callout box to it. The callout box contains the text: 'Enter a search term on the Catalog Search page and select 'Save current search...' from the 'Options' dropdown.' Below the search bar, there are fields for 'Supplier Part #' and 'Contract ID'. The search results show '68 items found' and a list of items. The first item is 'Paper, Dual Purpose, White, Husky/Quickcopy, ...' with a price of '\$26.99 USD' and a quantity of '1'. The second item is 'Paper, Dual Purpose, White, Husky/Quickcopy, ...' with a price of '\$26.51 USD' and a quantity of '1'. On the left side, there is a 'Refine your results' section with filters for 'Keyword', 'Price', and 'Favorites'. The 'Keyword' filter shows 'virgin (44)', 'white (44)', 'xerographic (40)', 'purpose (40)', and 'dual (40)'. The 'Price' filter shows '\$10.00 - \$100.00 USD (67)' and '\$100.00 - \$1,000.00 ... (1)'. The 'Favorites' filter shows '- Recent Choices -'. The 'Options' dropdown menu also includes 'Additional' options: 'Supplier Part #', 'Manufacturer Part #', 'Contract ID', and 'Commodity Code'. The 'Saved searches' section includes 'Save current search...'. The 'View: Details | Thumbnails' link is also visible.



NC E-Procurement Tips & Tricks

SAVING CATALOG SEARCHES

NCE-Procurement @your service **ARIBA*** **SPEND MANAGEMENT** Home | Help | Logout
Welcome CC Requester 02

Home Create Search Manage Recent Preferences

Save Catalog Search

Choose a descriptive name for this search. This will help you to find and reuse it later in the search options menu.

Search Name:

Name your Saved Search

Save Cancel

Save Cancel



NC E-Procurement Tips & Tricks

SAVING CATALOG SEARCHES

NCE-Procurement ARIBA® SPEND MANAGEMENT
@your service Home

Home | Help | Logout
Welcome CC Requester 02

Create Search Manage Recent Preferences

Supplier
Extreme Networks (1)
Koch Filter ... (7)
Shoretel (1)
Turf Equipment & ... (95)
ViON Corporation (1)
Show All ...

Language
English (117533)

Favorites
- Recent Choices - ▾

Catalog Home Browse By: [Categories](#) | [Suppliers](#)

Catalog [v] [Search] [Options] [Create Non-Catalog Item](#)

Supplier Part #: []
Contract ID: []

Additional
✓ Supplier Part #
Manufacturer Part #
✓ Contract ID
Commodity Code

Saved searches
Save current search
Run 'Paper Husky search'
Other...

AGRICULTURAL EQUIPMENT, SUPPLIES & CHEMICALS (6139)
AGRICULTURAL EQUIPMENT AND

EQUIPMENT & PAPER/PRINTING (3559)
EQUIPMENT AND
S (3528)
ND PAPER
PRODUCTS/PLASTICS (21)

APPLIANCES, ELECTRICAL, CLOCKS (14716)
APPLIANCES (3240)
ELECTRICAL EQUIPMENT (11476)

OIL & GAS (82)
405-00: FUEL, OIL, GREASE AND LUBRICANTS (32)
720-00: PUMPING EQUIPMENT AND ACCESSORIES (50)

BUILDING MATERIALS, MAINTENANCE (3278)
BUILDING MATERIALS (3229)
JANITORIAL SUPPLIES AND EQUIPMENT (47)
PAINT AND PAINT MATERIALS (2)

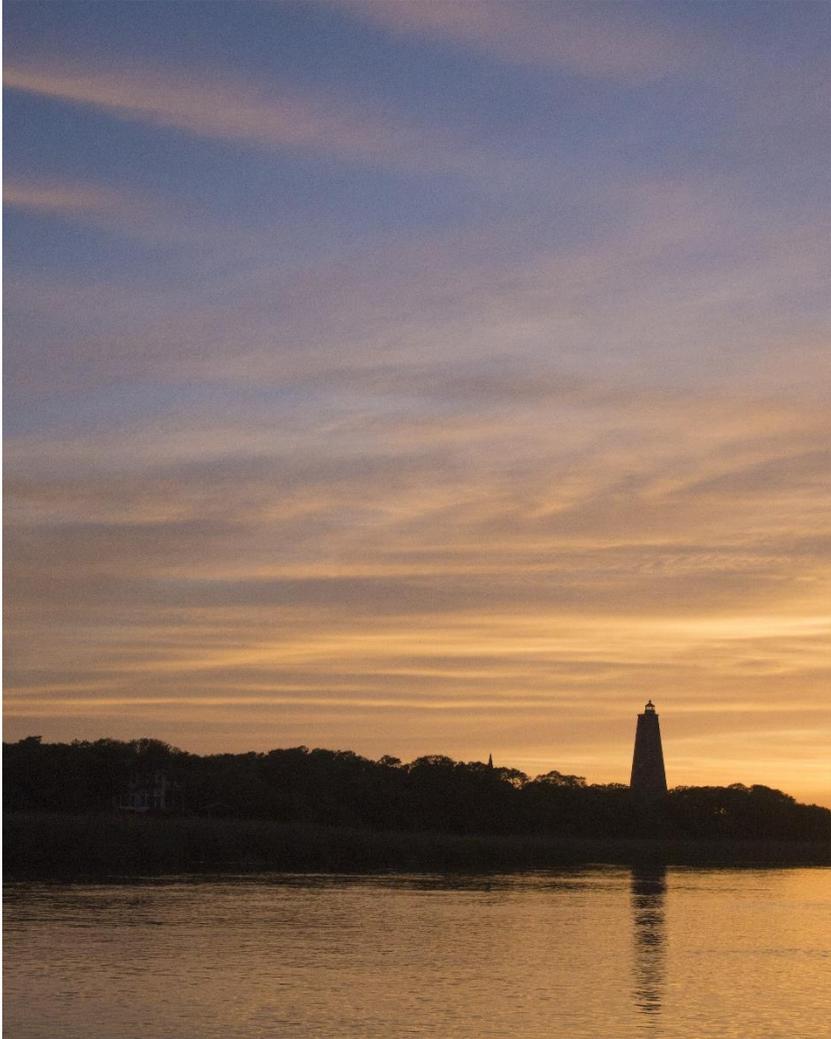
POLICE & SAFETY EQUIPMENT (167)
POLICE EQUIPMENT (167)

Run your Saved Search



NC E-Procurement Tips & Tricks

ORGANIZE



Personal Labels



Searches vs. Labels

A user should use **system searches** instead of labels in scenarios where there is a shared characteristic across all of the approvables in the group. For example, if the user would like to quickly locate all of the requisitions for one supplier, they should use System Searches instead of labels.

A user should apply a **label** to an item when it is something that they need to be able to access quickly but that may not share a common search field with the other items that are in the same label.

Labels are a good way to group together approvables that are all related to the same event, such as requisitions relating to a specific one-time event on campus, like an accident.



NC E-Procurement Tips & Tricks

PERSONAL LABELS

The screenshot displays the NC E-Procurement interface for a request titled "RQ19493175 - Fence Rebuild". The status is "Approved". The interface includes a navigation bar with "Create", "Search", "Manage", "Recent", and "Preferences". A "My Labels" dropdown menu is open, showing options: "Apply Label", "Add Label", "Archive Items", "New Label", and "Remove Label". A yellow callout box with the text "On the 'Summary' page, click 'Apply Label'" points to the "Apply Label" option. Below the menu is a table of line items with one entry: "Fence Rebuild" with a quantity of 1 and a total amount of \$615.25000 USD. A "Total Cost" box at the bottom right shows "\$615.25000 USD".

NC E-Procurement A R I B A[®] SPEND MANAGEMENT Home | Help | Logout
Welcome CC Requester 02

Create Search Manage Recent Preferences

RQ19493175 - Fence Rebuild

 Status: Approved

These are the details of the request you selected. Depending on its status, you can edit, change, copy, cancel, or submit the request for approval. You ...

Back Copy Print

Summary Approval Flow Orders Receipts

Title: Fence Rebuild

Transmit To Supplier?

My Labels: **Apply Label** Add Label Archive Items New Label Remove Label

Line Items (1) Hide Details

No.	Type	Description	Supplier Part Number	Qty	Unit	Tax	Other	Price	Amount
1		Fence Rebuild		1	each	\$40.25 USD	\$0.00 USD	\$575.00 USD	\$615.25000 USD

Fence Rebuild

Supplier: 1800 Rad - Greensboro
Location: Greensboro
Commodity Code: 988-15 - Fence Installation...

Account Code: 12345

Total Cost: \$615.25000 USD



NC E-Procurement Tips & Tricks

PERSONAL LABELS

NCE-Procurement A R I B A[®] SPEND MANAGEMENT Home | Help | Logout
@your service Home Welcome CC Requester 02

Create Search Manage Recent Preferences

RQ19493175 - Fence Rebuild

 Status: Approved

These are the details of the request you selected. Depending on its status, you can edit, change, copy

Back Copy Print

Add Label

Add new label to be associated with ...

Enter New Label: Fall Parking Lot Accident

OK Cancel

Summary Approval Flow Orders Receipts

Title: Fence Rebuild
Transmit To Supplier?
My Labels: [Apply Label...](#)

Line Items (1)

 Hide Details| No. | Type | Description | Supplier Part Number | Qty | Unit | Tax | Other | Price | Amount |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| 1 | | Fence Rebuild | | 1 | each | \$40.25 USD | \$0.00 USD | \$575.00 USD | \$615.25000 USD |

Fence Rebuild

Supplier: 1800 Rad - Greensboro
Location: Greensboro
Commodity Code: 988-15 - Fence Installation...
Account Code: 12345

Total Cost: \$615.25000 USD



NC E-Procurement Tips & Tricks

PERSONAL LABELS

NC E-Procurement ARIBA® SPEND MANAGEMENT Home | Help | Logout
@your service Home Welcome CC Requester 02

Create Search Manage Recent Preferences

Home Dashboard

Configure Tabs Refresh Content

Common Actions

- Create
eRequisition
- Manage
Reports

To Do

ID	Date ↓	From	Status	Title	Required Action
No items					

Search

Catalog ID:

eRequisition Search

Purchase Order

Receipt

User Profile

More...

My Saved Searches

101 Gardens (Furniture)

My Labels

Fall Parking Lot Accident...

News

Read Past Issues of *The Source*

The Source newsletter contains timely information about NC E-Procurement activities.

Read past issues at http://eprocurement.nc.gov/Buyer/The_Source.html

Recently Viewed

RQ19493174 Accident Clean

Labels will only appear if the specific **Type** of search is selected



NC E-Procurement Tips & Tricks

PERSONAL LABELS

The screenshot shows the NC E-Procurement interface. The top navigation bar includes 'Home | Help | Logout' and 'Welcome CC Requester 02'. The main search area is titled 'Search' and has a 'Type: eRequisition' dropdown. Below this, there are search filters and a table of results.

Search Filters:

- Title: [text input]
- ID: [text input]
- Approved By: (select a value) [select]
- Commodity Code (any line item): (select a value) [select]
- Date Approved: No Choice [dropdown]
- Date Created: [text input]
- Description: [text input]
- Entity: CCCC [select]
- Legacy Document Id: [text input]
- Order ID (any line item): [text input]
- Requester: (select a value) [select]
- Status: No Choice [dropdown]
- Requester (any line item): (select a value) [select]
- Cost: [text input] To: [text input] USD

Search Options: Search, Reset, Save Search

Search Results Table:

Type	ID	Title	Status	Date Created	Total
	RQ19493174	Accident Clean Up	Approved	Today, 5:59 AM	\$267.50000 USD
	RQ19493175	Fence Rebuild	Approved	Today, 6:02 AM	\$615.25000 USD

Callout Box: Labels are listed here when the specific **Type** of search is selected. Select the desired Label to display the grouped items.



NC E-Procurement Tips & Tricks

PERSONAL LABELS

The screenshot shows the NC E-Procurement interface. At the top, it says "NC E-Procurement @your service" and "ARIBA* SPEND MANAGEMENT". The user is logged in as "Welcome CC Requester 02". The main navigation bar includes "Create", "Search", "Manage", "Recent", and "Preferences".

The "Search" section is active, showing a search type of "eRequisition". Below this is a "Search Filters" section with various input fields for Title, ID, Approved By, Commodity Code, Date Approved, Date Created, and Description. There are also dropdown menus for "Status" and "Supplier".

The "Search Results" section shows "Found 2 items". The results are displayed in a table with columns for checkboxes, Type, ID, Title, Status, Date Created, and Total. Two items are listed: "Accident Clean Up" and "Fence Rebuild".

A yellow callout box with the text "You can also assign a Label by checking the box next to an approvable and then clicking 'Label.'" points to the "Label" button in the search results table. The "Label" button is circled in red.

<input type="checkbox"/>	Type	ID	Title	Status	Date Created	Total
<input type="checkbox"/>		RQ19493174	Accident Clean Up	Approved	Today, 5:59 AM	\$267.50000 USD
<input type="checkbox"/>		RQ19493175	Fence Rebuild	Approved	Today, 6:02 AM	\$615.25000 USD



NC E-Procurement Tips & Tricks

ORGANIZE



Managing Open eRequisitions



Prior to deleting a user, all transactions created by that user must be in a completed state, i.e., all eRequisitions must be in '**Approved**' status. This means that all eRequisitions with a '**Composing,**' '**Denied,**' or '**Submitted**' status should be resolved by the user before they leave the agency.

Based on the status of the eRequisition, the following resolutions may apply:

- **Composing** – Delete
- **Denied** – Withdraw & Delete the eRequisition. If changes are required, updates should be made and submitted under an active user account.
- **Submitted** – Fully Approve or Withdraw & Delete the eRequisition.

If a user has already left the agency without having first converted all eRequisitions to '**Approved**' status, it will not be possible to delete them without assistance from the NC E-Procurement Help Desk. Following a written request, the Help Desk can update the '**On Behalf Of**' field and the new user will then be able to search for and delete or otherwise act upon the above types of open eRequisitions.

NC E-Procurement Tips & Tricks

MANAGING OPEN eREQUISITIONS

The screenshot displays the ARIBA Spend Management interface for managing eRequisitions. The top navigation bar includes 'Home', 'Help', and 'Logout', with a welcome message 'Welcome CC Requester 02'. The main navigation menu contains 'Create', 'Search', 'Manage', 'Recent', and 'Preferences'. The 'Search' section is active, showing a search type of 'eRequisition'. A yellow callout box explains that if the 'Status' field is not visible, it can be added via the 'Search Options' link. The 'Search Filters' section includes fields for Title, ID, Approved By, Commodity Code, Date Approved, Date Created, and Description. The 'Status' dropdown menu is open, showing options like 'No Choice', 'Composing', 'Approved', 'Submitted', 'Denied', 'Ordering', 'Ordered', 'Receiving', 'Received', 'Canceling', and 'Canceled'. The 'Composing' option is highlighted. A 'Search Options' link is circled in the top right of the search filters area.

Search Options

If the **'Status'** field does not automatically display on your search page, you can add it from the drop-down menu displayed after clicking the **'Search Options'** link.

Search Filters

Title:

ID:

Approved By: (select a value) [select]

Commodity Code (any line item): (select a value) [select]

Date Approved: No Choice ▼

Date Created: No Choice ▼

Description (any line item):

Legacy Document Id:

Order ID (any line item):

Requester: CC Requester 02 [select]

Status: No Choice ▼

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

Total Cost: USD

Buttons: [ch] [Reset] [Save Search]



NC E-Procurement Tips & Tricks

MANAGING OPEN eREQUISITIONS

The screenshot shows the ARIBA Spend Management interface for NC E-Procurement. The top navigation bar includes 'Home', 'Help', and 'Logout'. The user is logged in as 'Welcome CC Requester 02'. The main menu has 'Create', 'Search', 'Manage', 'Recent', and 'Preferences'. The 'Search' section is active, showing a search type of 'eRequisition'. Below the search filters, there is a table of search results. A yellow callout box with arrows points to the checkboxes in the search results table and the 'Delete' button.

Search Filters:

- Title: [text input]
- ID: [text input]
- Approved By: (select a value) [select]
- Commodity Code (any line item): (select a value) [select]
- Date Approved: No Choice [dropdown]
- Date Created: No Choice [dropdown]
- Description (any line item): [text input]
- Entity: CCCC [select]
- Legacy Document Id: [text input]
- Order ID (any line item): [text input]
- Requester: CC Requester 02 [select]
- Status: Composing [dropdown]
- Supplier (any line item): (select a value) [select]
- Total Cost: [text input] USD

Search Results:

Type	ID	Title	Status	Created	Total
<input checked="" type="checkbox"/>	RQ19493179	Office Supplies		12:43 PM	\$53.50000 USD
<input checked="" type="checkbox"/>	RQ19493178	T Shirts	Composing	Today, 12:42 PM	\$64.20000 USD
<input checked="" type="checkbox"/>	RQ19493180	Art Supplies	Composing	Today, 12:45 PM	\$95.23000 USD

Callout Box Text: Check the boxes next to each eRequisition, or check the box next to the column header which highlights all eRequisitions at once, then click 'Delete.'



NC E-Procurement Tips & Tricks

PERSONALIZE

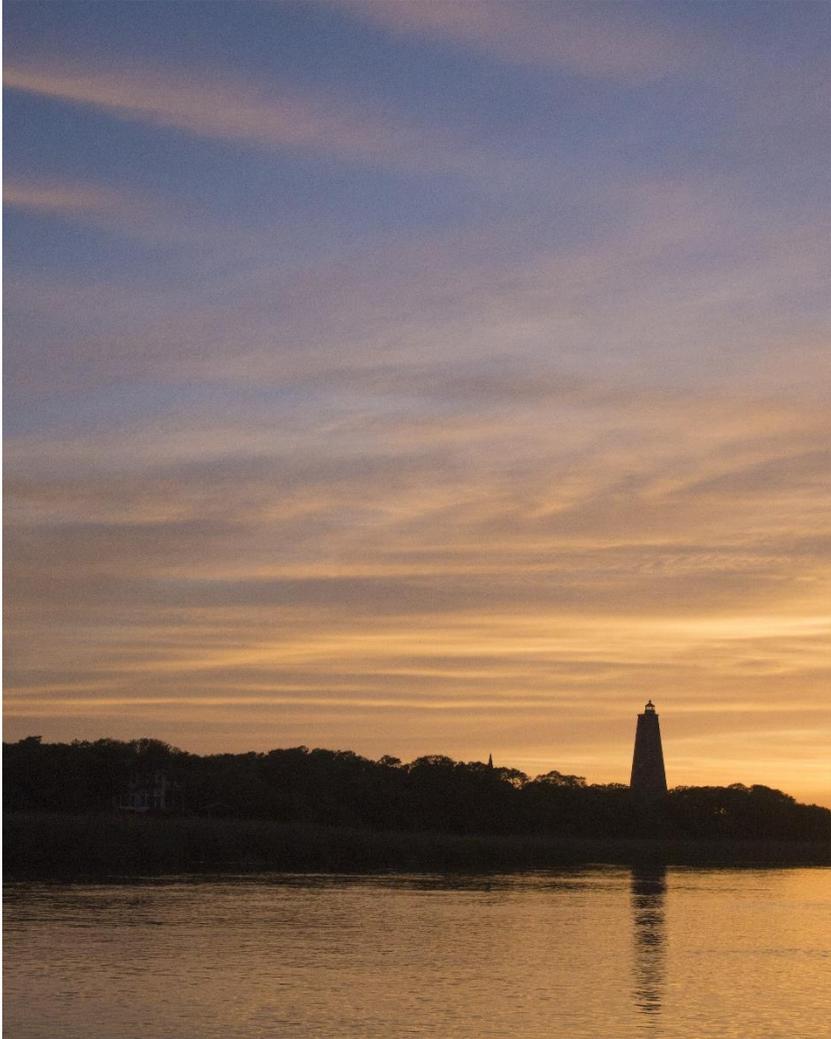
How can you PERSONALIZE your NC E-Procurement experience in a better way?

- Configure Tabs
- Configure Portlets
- Manage Email Notifications
- Reset Default Preferences



NC E-Procurement Tips & Tricks

PERSONALIZE



Configure Tabs

NC E-Procurement Tips & Tricks

CONFIGURE TABS

The screenshot displays the NC E-Procurement ARIBA Spend Management interface. At the top, the logo 'NC E-Procurement @ your service' is on the left, and 'ARIBA* SPEND MANAGEMENT' is in the center. On the right, there are links for 'Home | Help | Logout' and a welcome message 'Welcome CC Supervisor 02'. Below the header is a navigation bar with 'Create', 'Search', 'Manage', 'Recent', and 'Preferences'. The main content area is titled 'Home Dashboard' and contains several widgets: 'Common Actions' with 'Create eRequisition' and 'Manage Reports'; 'Recently Viewed' with 'RQ19493172 Bookshelf'; a 'Search' widget with a search bar and 'Search' button; and a 'News' widget with the title 'Read Past Issues of The Source' and a paragraph of text. A yellow callout box with the text 'From the 'Configure Tabs' menu, click 'Add New Tab.' is positioned over the 'Configure Tabs' menu item in the top right. The menu is open, showing options like 'Current Tab', 'Add Content', 'Edit Properties', 'Delete Tab', and 'Tab Set Options' with 'Add New Tab' highlighted. A table of requisitions is visible in the background, with columns for ID, Date, From, Status, and Title.

Home | Help | Logout
Welcome CC Supervisor 02

Create Search Manage Recent Preferences

Home Dashboard

Common Actions

- Create
eRequisition
- Manage
Reports

Recently Viewed

- RQ19493172 Bookshelf

Search

Catalog ID:

eRequisition

Purchase Order

News

Read Past Issues of *The Source*

The Source newsletter contains timely information about NC E-Procurement activities.

From the 'Configure Tabs' menu, click 'Add New Tab.'

Configure Tabs Refresh Content

Current Tab

- Add Content
- Edit Properties
- Delete Tab

Tab Set Options

- Add New Tab
- Compare Your Tabs to Default Settings
- Revert Tab Set to Default Settings

ID	Date ↓	From	Status	Tit
RQ19493179	4/12/2016	CC Requester 02	Submitted	0
RQ19493180	4/12/2016	CC Requester 02	Submitted	0
RQ19493176	4/12/2016	CC Requester 02	Submitted	0



NC E-Procurement Tips & Tricks

CONFIGURE TABS

The screenshot shows the 'Add New Dashboard Tab' form in the NCE-Procurement system. The form includes a header with the NCE-Procurement logo and 'ARIBA SPEND MANAGEMENT'. The main content area has a title 'Add New Dashboard Tab' and a text input field for the tab name, which is currently set to 'New Dashboard Tab'. Below the name field are two radio button options for document types: 'Display all document types on this tab.' (selected) and 'Restrict the type of documents displayed on this tab.'. There are 'OK' and 'Cancel' buttons at the top right and bottom right of the form. A yellow callout box with the text 'Name the 'New Dashboard Tab' and click 'OK.' has two arrows: one pointing to the 'Tab Name' input field and another pointing to the 'OK' button at the bottom right. A dashed oval highlights the 'Tab Name' input field, and another dashed oval highlights the 'OK' button at the bottom right.



NC E-Procurement Tips & Tricks

CONFIGURE TABS

NCE-Procurement @your service

ARIBA® SPEND MANAGEMENT

Home | Help | Logout

Welcome CC Supervisor 02

Create Search Manage Recent Preferences

To Approve Dashboard

Configure Tabs Refresh Content

Add Content Done

Click and Drag content items below onto the dashboard.

- ▼ NCEP Portlets
 - Purchasing Links
- ▼ General
 - News
 - Common Actions
 - Recently Viewed
 - Search
 - To Do
 - My Documents
- ▼ Buyer
 - Saved Search

No Content
(drag content items from menu at right)

On the newly titled Tab, select 'Add Content' from the 'Configure Tabs' menu, and then 'Click and Drag' the items you want on the new tab into the position you'd like it to reside.



NC E-Procurement Tips & Tricks

CONFIGURE TABS

Home | Help | Logout

NC E-Procurement @ your service A R I B A* SPEND MANAGEMENT

Welcome CC Supervisor 02

Home To Approve

Create Search Manage Recent Preferences

To Approve Dashboard

Configure Tabs Refresh Content

To Do						
ID	Date ↓	From	Status	Title	Required Action	
RQ19493179	4/12/2016	CC Requester 02	Submitted	Office Supplies	Approve	
RQ19493180	4/12/2016	CC Requester 02	Submitted	Art Supplies	Approve	
RQ19493176	4/12/2016	CC Requester 02	Submitted	Office Chair	Approve	

[View List ...](#) (3)



NC E-Procurement Tips & Tricks
PERSONALIZE



Configure Portlets

NC E-Procurement Tips & Tricks

CONFIGURE PORTLETS

The screenshot displays the NC E-Procurement Home Dashboard. At the top, the navigation bar includes the logo, 'ARIBA® SPEND MANAGEMENT', and user options like 'Home | Help | Logout'. Below this is a secondary navigation bar with 'Create', 'Search', 'Manage', 'Recent', and 'Preferences'. The main content area is titled 'Home Dashboard' and contains several portlets: 'Common Actions' (Create, Manage), 'Recently Viewed' (listing requisitions), 'To Do', 'Search', 'My Saved Searches', 'My Labels', 'News', and 'My Documents'. A 'Configure Tabs' menu is open over the 'To Do' portlet, showing options like 'Add Content', 'Edit Properties', and 'Delete Tab'. A yellow callout box with an arrow points to the 'Add Content' option, containing the text: 'From the 'Configure Tabs' menu, click 'Add Content.''

From the 'Configure Tabs' menu, click 'Add Content.'



NC E-Procurement Tips & Tricks

CONFIGURE PORTLETS

The screenshot displays the NC E-Procurement home dashboard. At the top, the header includes the logo, 'ARIBA® SPEND MANAGEMENT', and navigation links for 'Home', 'Help', and 'Logout'. Below the header is a secondary navigation bar with 'Home' selected, and links for 'Create', 'Search', 'Manage', 'Recent', and 'Preferences'. The main content area is titled 'Home Dashboard' and contains several portlets: 'Common Actions' (with 'Create' and 'Manage' options), 'Recently Viewed' (showing a list of requisitions), 'To Do' (a table with columns for ID, Date, From, Status, Title, and Requisition, currently empty), 'Search' (with a search bar and 'Search' button), 'News' (with a link to 'Read Past Issues of The Source'), and 'My Saved Searches' (listing '101 Gardens (Furniture) Approved eRequisitions'). A 'Configure Tabs' dialog box is open, showing a 'Buyer' category with a 'Saved Search' portlet. A yellow callout box with a dashed blue line indicates that a blue dotted line appears when dragging the 'Saved Search' portlet to show its intended position on the dashboard.

While dragging the 'Saved Search' option, a blue dotted line will indicate the position where the portlet will appear.



NC E-Procurement Tips & Tricks

CONFIGURE PORTLETS

NC E-Procurement @your service ARIBA* SPEND MANAGEMENT Help

Welcome CC Requester 02

Create Search Manage Recent

Configure Dashboard Saved Search Content

Select a saved search that you created in the NC E-Procurement Service, to view the associated requests on your dashboard. For example, if you created a search for ...

SEARCHES

Name ↑	System Search	Search Category	
101 Gardens (Furniture)		eRequisition	Select
Approved eRequisitions		eRequisition	Select

Select the 'Saved Search' for which you'd like to create a new dashboard portlet.

Cancel



NC E-Procurement Tips & Tricks

CONFIGURE PORTLETS

The screenshot shows the NC E-Procurement Home Dashboard. At the top, there is a navigation bar with 'Home', 'Help', and 'Logout' links, and a welcome message 'Welcome CC Requester 02'. Below this is a secondary navigation bar with 'Create', 'Search', 'Manage', 'Recent', and 'Preferences' options. The main content area is titled 'Home Dashboard' and contains several portlets: 'Create eRequisition', 'Manage Reports', 'Recently Viewed' (listing items like Office Supplies, Art Supplies, T Shirts, Accident Clean Up, and Fence Rebuild), 'Approved eRequisitions' (a table with columns for ID, Type, Date Created, Status, Title, and Total), 'Search' (with a search bar and filters for eRequisition, Purchase Order, and Receipt), and 'News' (with a link to 'Read Past Issues of The Source'). A yellow callout box points to the 'Saved Search' portlet in the 'Buyer' dropdown menu, stating: 'The 'Saved Search' portlet will appear on the dashboard.' Another yellow callout box points to the 'Add Content' button in the 'Buyer' dropdown menu, stating: 'Click and Drag content items below onto the dashboard.' A 'Done' button is also visible in the 'Add Content' dropdown menu.

NC E-Procurement @your service

ARIBA® SPEND MANAGEMENT

Home | Help | Logout

Welcome CC Requester 02

Create Search Manage Recent Preferences

Home Dashboard

Configure Tabs Refresh Content

Add Content Done

Click and Drag content items below onto the dashboard.

Buyer

Saved Search

Approved eRequisitions

ID	Type	Date Created	Status	Title	Total
RQ19493172		4/12/2016	Approved	Bookshelf	\$369.15 USD
RQ19493174		4/12/2016	Approved	Accident Clean Up	\$267.50 USD
RQ19493175		4/12/2016	Approved	Fence Rebuild	\$615.25 USD

Search

Catalog ID:

eRequisition

Purchase Order

Receipt

My Saved Searches

101 Gardens (Furniture)
Approved eRequisitions

News

Read Past Issues of The Source

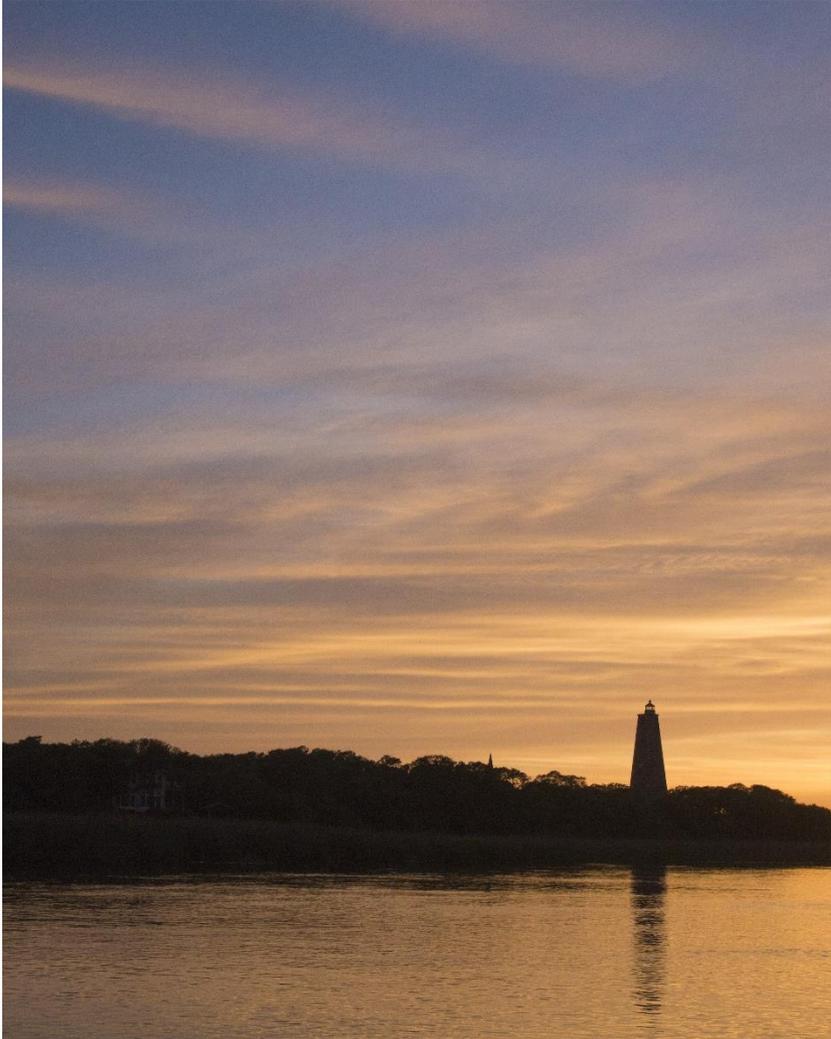
The Source newsletter contains timely information about NC E-Procurement activities.

Read past issues at http://eprocurement.nc.gov/Buyer/The_Source.html



NC E-Procurement Tips & Tricks

PERSONALIZE



*Manage Email
Notifications*

NC E-Procurement Tips & Tricks

MANAGE EMAIL NOTIFICATIONS

The screenshot displays the NC E-Procurement system interface. At the top, the logo reads "NCE-Procurement @your service" and "ARIBA® SPEND MANAGEMENT". The navigation bar includes "Home", "Create", "Search", "Manage", "Recent", and "Preferences". The "Preferences" dropdown menu is open, showing options: "Delegate authority", "Change your profile", "Change email notification preferences", and "Reset default preference". A yellow callout box with a black border contains the text: "Open the 'Preferences' drop-down menu on the Menu Bar and select 'Change email notification preferences.'".

Home Dashboard

Common Actions

- Create
 - eRequisition
- Manage
 - Reports

Recently Viewed

- RQ19493179 Office Supplies
- RQ19493180 Art Supplies
- RQ19493178 T Shirts
- RQ19493174 Accident Clean Up
- RQ19493175 Fence Rebuild

Purchasing Links

Search

Catalog ID:

eRequisition

Purchase Order

Receipt

User Profile

More...

My Saved Searches

- 101 Gardens (Furniture) Approved eRequisitions

My Labels

- Fall Parking Lot Accident...

My Documents

ID	Title ↑	Date	Status
RQ19493174	Accident Clean Up	4/12/2016	Approved

Read Past Issues of The Source

The Source newsletter contains timely information about NC E-Procurement activities.

Read past issues at http://eprocurement.nc.gov/Buyer/The_Source.html



NC E-Procurement Tips & Tricks

MANAGE EMAIL NOTIFICATIONS

NC E-Procurement @your service A R I B A* SPEND MANAGEMENT Home | Help | Logout

Welcome CC Supervisor 02

Create Search Manage Recent Preferences

Edit Email Notification Preferences

For each document type listed, specify the types of email notification messages to receive and how often you want to receive them. The option ...

Edit preferences for:

- Other document types
- UserMaintenance
- AddressMaintenance
- eRequisition**
- ContractMaintenance
- Receipt
- User Profile

No preference currently

Cancel

Select the appropriate document type to edit using the **'Edit preferences for...'** drop-down menu.



NC E-Procurement Tips & Tricks

MANAGE EMAIL NOTIFICATIONS



NC E-Procurement @your service A R I B A® SPEND MANAGEMENT Home | Help | Logout

Welcome CC Supervisor 02

Create Search **Manage** Recent Preferences

Edit Email Notification Preferences

For each document type listed, specify the types of email notification messages to receive and how often you want to receive them. The option ...

Edit preferences for: eRequisition

Notification method

When I am an approver: Send email immediately

When I am a watcher: Send email immediately

Notification frequency

Each time the document is approved: Send email

When the document is fully approved: Send email

When I need to approve a document: Send once

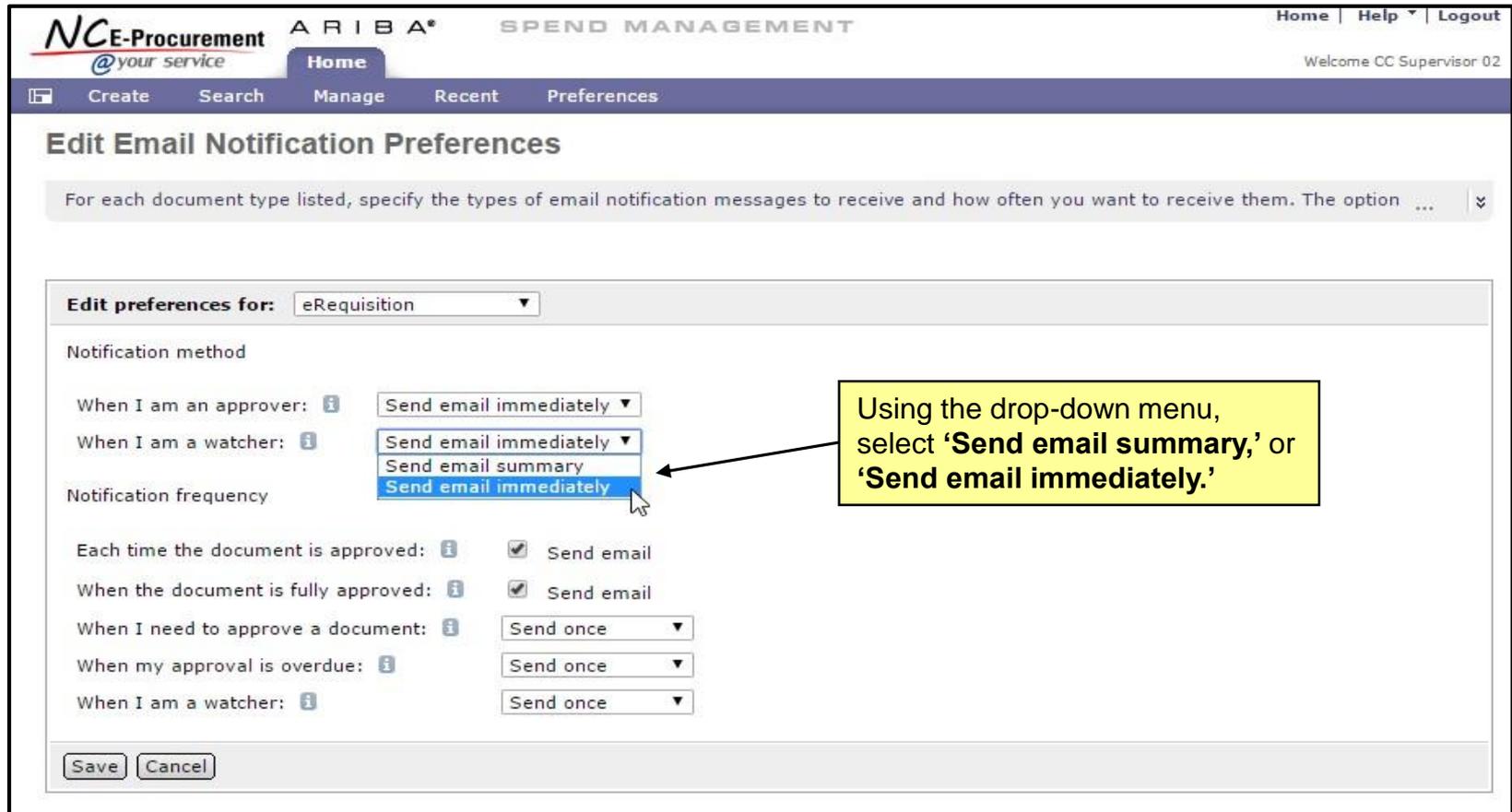
When my approval is overdue: Send once

When I am a watcher: Send once



NC E-Procurement Tips & Tricks

MANAGE EMAIL NOTIFICATIONS



NC E-Procurement @your service **ARIBA** SPEND MANAGEMENT Home | Help | Logout
Welcome CC Supervisor 02

Create Search Manage Recent Preferences

Edit Email Notification Preferences

For each document type listed, specify the types of email notification messages to receive and how often you want to receive them. The option ...

Edit preferences for: eRequisition

Notification method

When I am an approver: Send email immediately

When I am a watcher: **Send email immediately**
Send email summary
Send email immediately

Notification frequency

Each time the document is approved: Send email

When the document is fully approved: Send email

When I need to approve a document: Send once

When my approval is overdue: Send once

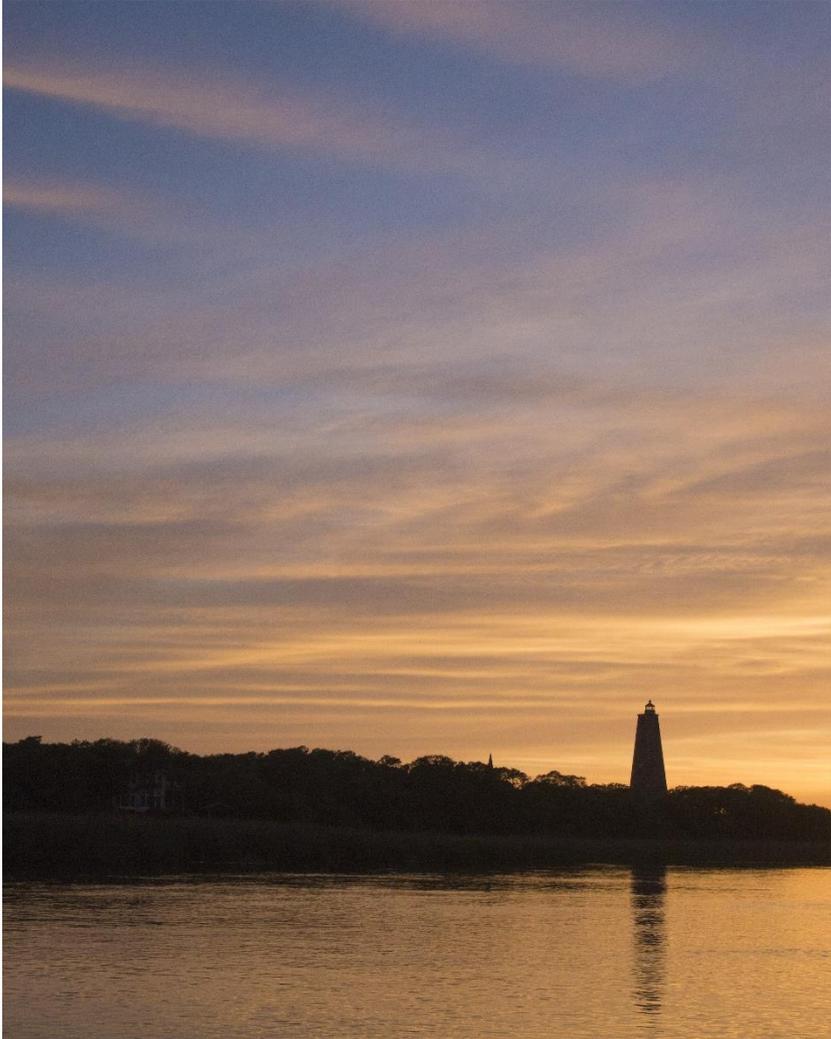
When I am a watcher: Send once

Using the drop-down menu, select 'Send email summary,' or 'Send email immediately.'



NC E-Procurement Tips & Tricks

PERSONALIZE



*Reset Default
Preferences*

NC E-Procurement Tips & Tricks

RESET DEFAULT PREFERENCES

The screenshot displays the NC E-Procurement SPEND MANAGEMENT interface. At the top, the logo reads "NCE-Procurement @your service" and "ARIBA® SPEND MANAGEMENT". The user is logged in as "Welcome CC Supervisor 02". The main navigation bar includes "Home", "Create", "Search", "Manage", "Recent", and "Preferences". A "Preferences" dropdown menu is open, showing options: "Delegate authority", "Change your profile", "Change email notification preferences", and "Reset default preference". A dashed circle highlights the "Reset default preference" option, with an arrow pointing to a yellow callout box. The callout box contains the text: "Begin by selecting 'Reset default preference' from the 'Preferences' drop-down menu on the Menu Bar." Below the menu, a table lists requisitions with columns for ID, Date, From, Status, Title, and Required Action. The table contains three rows of requisitions, all dated 4/12/2016 and from "CC Requester 02".

ID	Date	From	Status	Title	Required Action
RQ19493179	4/12/2016	CC Requester 02			Approve
RQ19493180	4/12/2016	CC Requester 02			Approve
RQ19493176	4/12/2016	CC Requester 02			Approve

Begin by selecting 'Reset default preference' from the 'Preferences' drop-down menu on the Menu Bar.



NC E-Procurement Tips & Tricks

RESET DEFAULT PREFERENCES

NC E-Procurement A R I B A® SPEND MANAGEMENT Home | Help | Logout
@your service Home Welcome CC Supervisor 02

Create Search Manage Recent Preferences

Reset Default Preferences

Set individual preferences, or reset all preferences to their default settings at one time.

Reset default preferences in the NC E-Procurement Service:

Preference	Setting
Show catalog item details in thumbnail view	<input type="checkbox"/>
Show confirmation page before deleting a request	<input checked="" type="checkbox"/>
Expand Item Details	<input type="checkbox"/>
Show additional information before going to the receiving summary page	<input checked="" type="checkbox"/>
Show catalog on requisition creation	<input checked="" type="checkbox"/>
Display catalog item images	<input checked="" type="checkbox"/>
Show confirmation page before editing a request	<input checked="" type="checkbox"/>
Show Navigation Panel	<input checked="" type="checkbox"/>
Receive email notifications in plain text format	<input type="checkbox"/>
Receive email notifications in compact text format	<input type="checkbox"/>

Reset OK Cancel

Check or un-check any setting to match your preference, then click 'OK.'



NC E-Procurement Tips & Tricks

ADDITIONAL TIPS

*What are a few
NC E-Procurement processes of
which you can take advantage?*

- Mass Approvals
- Archiving Watcher Notifications
- Adding Catalog Favorites
- Copying eRequisitions
- Searching by '**Originating System Ref. ID**' field



NC E-Procurement Tips & Tricks

ADDITIONAL TIPS



Mass Approve

NC E-Procurement Tips & Tricks

MASS APPROVE

NC E-Procurement @ your service **A R I B A*** **SPEND MANAGEMENT** Home | Help | Logout
Welcome Amanda Meyer

Home | To Do | Create | Search | Manage | Recent | Preferences

Configure Tabs Refresh Content

Home Dashboard

Common Actions

- Create**
 - eRequisition
 - UserMaintenance
 - AddressMaintenance
- Manage**
 - Receive
 - Administrator
 - Reports

Recently Viewed

- US56005 Unti...erMaintenance
- US56004 Unti...erMaintenance
- 4300300971 POT-4300300971
- 4300306909 POT-4300306909

To Do

ID	Date ↓	From	Status	Title	Required Action
4300307808	4/5/2016	Sharon T. McCalop	Submitted	POT-4300307808	Approve
4300307610	4/5/2016	Danny Oliver	Submitted	POT-4300307610	Approve
4300307441	4/4/2016	Miles Davis	Submitted	POT-4300307441	Approve
4300307304	3/29/2016	Danny Oliver	Submitted	POT-4300307304	Approve
4300307160	3/24/2016	Danny Oliver	Submitted	POT-4300307160	Approve
4300287894	3/23/2016	Debbie Hill	Submitted	CHANGED: POT-4300287894	Approve

[View List ... \(48\)](#)

Search

Catalog ID:

eRequisition

Purchase Order

Receipt

My Saved Searches
Denied

My Labels

News

Read Past Issues of *The Source*

The Source newsletter contains timely information about NC E-Procurement activities.

Read past issues at http://eprocurement.nc.gov/Buyer/The_Source.html



NC E-Procurement Tips & Tricks

MASS APPROVE

NC E-Procurement @your service **ARIBA*** **SPEND MANAGEMENT** Home | Help | Logout
Welcome Amanda Meyer

Create Search Manage Recent Preferences Customize

Approve Requests

You are included in the approval flow for these requests, and you are required to approve or deny them. To review a summary of a request before taking action, click the ...

[Back](#)

You have 48 requests awaiting your approval.

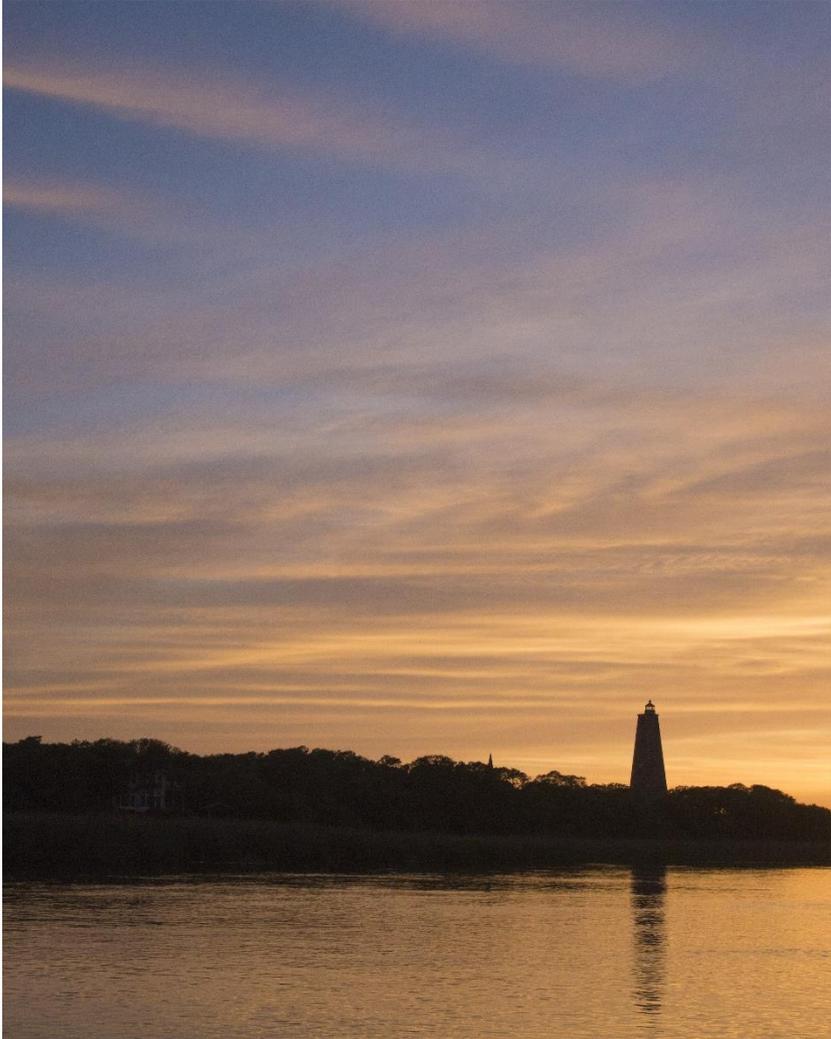
<input type="checkbox"/>	Type	ID	Date Submitted ↑	Requester	Status	Title	Total
<input checked="" type="checkbox"/>		4300300633	Tue, 10 Nov, 2015	Jeff Conken	Submitted	POT-4300300633	\$2,931.22 USD
<input type="checkbox"/>		4300300733	Fri, 13 Nov, 2015	Jeff Conken	Submitted	POT-4300300733	\$32,510.00 USD
<input checked="" type="checkbox"/>		4300301203	Fri, 20 Nov, 2015	Sharon T. McCalop	Submitted	POT-4300301203	\$5,625.05 USD
<input checked="" type="checkbox"/>		4300301779	Thu, 10 Dec, 2015	Miles Davis	Submitted	POT-4300301779	\$6,290.00 USD
<input checked="" type="checkbox"/>		4300301955	Fri, 11 Dec, 2015	Chris Andresen	Submitted	POT-4300301955	\$5,130.00 USD
<input type="checkbox"/>		4300302242	Thu, 17 Dec, 2015	Miles Davis	Submitted	POT-4300302242	\$4,400.00 USD
<input type="checkbox"/>		4300302192	Mon, 21 Dec, 2015	Sharon T. McCalop	Submitted	POT-4300302192	\$314.01 USD
<input type="checkbox"/>		4300302301	Mon, 21 Dec, 2015	Danny Oliver	Submitted	POT-4300302301	\$455,804.00 USD
<input type="checkbox"/>		4300302412	Tue, 22 Dec, 2015	Miles Davis	Submitted	POT-4300302412	\$253,913.00 USD

[Approve](#) [Deny](#) [Archive To Label](#) [Clean Up](#)



NC E-Procurement Tips & Tricks

ADDITIONAL TIPS



Archiving Watcher Notifications

NC E-Procurement Tips & Tricks

ARCHIVING WATCHER NOTIFICATIONS

NCE-Procurement @your service **ARIBA** SPEND MANAGEMENT Home | Help | Logout
Welcome CC Requester 04

Create Search Manage Recent Preferences

Home Dashboard

Configure Tabs Refresh Content

Common Actions

- Create eRequisition
- Manage Reports

To Do

ID	Date ↓	From	Status	Title	Required Action
RQ19493183	4/13/2016	CC Requester 03	Approved	First Aid Supplies	Watch
RQ19493181	4/13/2016	CC Requester 03	Approved	Office Desk	Watch
RQ19493182	4/13/2016	CC Requester 03	Approved	Paper Order	Watch

[View List ... \(3\)](#)

Recently Viewed

- RQ19493183 F... Aid Supplies

Purchasing Links

E-Procurement Resources

Search

Catalog ID:

eRequisition

Purchase Order

Receipt

User Profile

News

Read Past Issues of *The Source*

The Source newsletter contains timely information about NC E-Procurement activities.

Read past issues at http://eprocurement.nc.gov/Buyer/The_Source.html



NC E-Procurement Tips & Tricks

ARCHIVING WATCHER NOTIFICATIONS

NC E-Procurement @your service ARIBA* SPEND MANAGEMENT Home | Help | Logout
Welcome CC Requester 04

Create Search Manage Recent Preferences

View Requests

You are included in the approval flow for these requests, for your information only. As a watcher, you are not required to approve or deny them. To review a summary of a ...

[Back](#)

You are a watcher on 3 requests.

<input checked="" type="checkbox"/>	Type ↑	ID	Date Created	Status	Title	Total
<input checked="" type="checkbox"/>		RQ19493183	Today, 4:37 AM	Approved	First Aid Supplies	\$80.25 USD
<input checked="" type="checkbox"/>		RQ19493181	Today, 4:32 AM	Approved	Office Desk	\$274.99 USD
<input checked="" type="checkbox"/>		RQ19493182	Today, 4:35 AM	Approved	Paper Order	\$426.93 USD

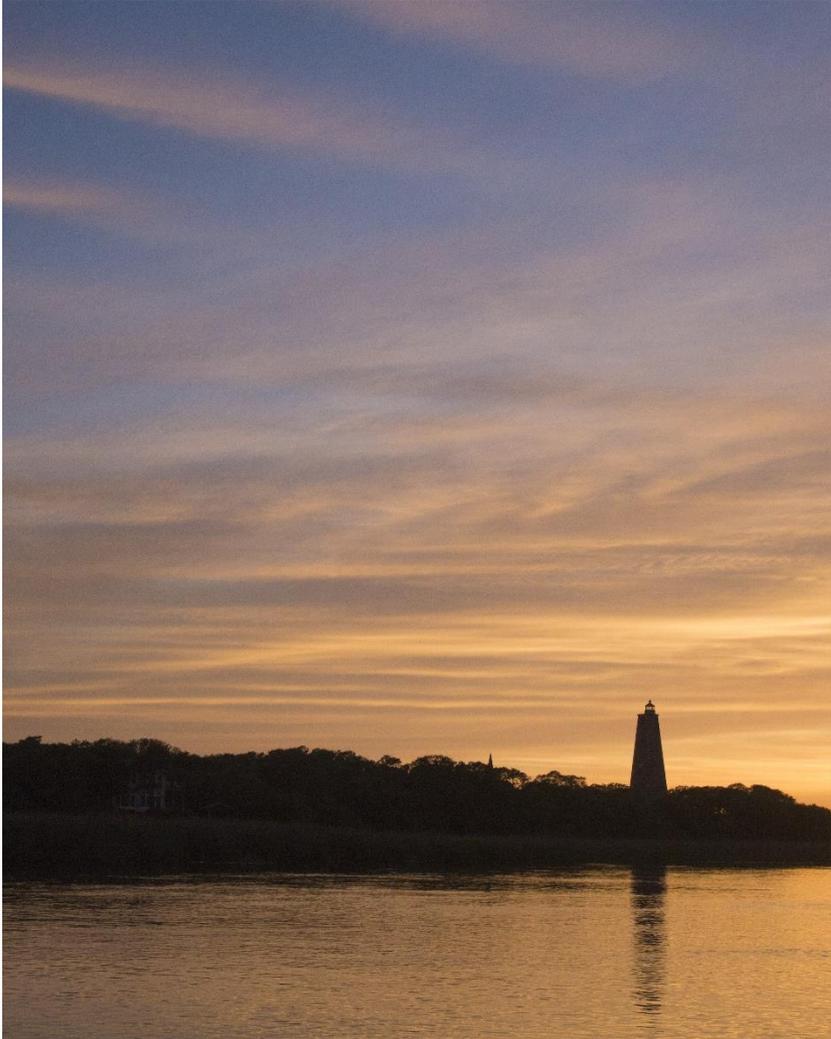
Archive To Label Clean Up

- Archive Items
- New Label



NC E-Procurement Tips & Tricks

ADDITIONAL TIPS



Adding Catalog Favorites

NC E-Procurement Tips & Tricks

ADDING CATALOG FAVORITES

The screenshot displays the NC E-Procurement system interface. At the top, the logo reads "NCE-Procurement @your service" and "ARIBA* SPEND MANAGEMENT". Navigation links include "Home", "Help", and "Logout". A secondary navigation bar contains "Home", "Create", "Search", "Manage", "Recent", and "Preferences".

The main content area is titled "Catalog Home" and features a search bar with "Paper Husky" entered. Below the search bar are input fields for "Supplier Part #:" and "Contract ID:". A yellow callout box on the left contains the text: "Select an item from the Catalog Search page, click 'Add to Favorites,' and select 'Add.'" An arrow points from this box to the "Add" button in a dropdown menu that is open over the "Add to Favorites" button. The dropdown menu options are "Add", "Add To Folders...", "-----", and "Organize Favorites...".

Below the search results, a product listing is shown: "Paper, Dual Purpose, White, Husky/Quickcopy, ...". The price is "\$26.99 USD" and the quantity is "Qty: 1". The supplier is identified as "MAC PAPERS INC.". Additional details include "Supplier Part #: 1120HXA", "Term Contract: 645A", and "Available in: 20 Day(s)". A detailed description at the bottom reads: "Paper, Dual Purpose, White, Husky/Quickcopy, Xerographic, 8.5 x 11, 20 lb, Virgin, 10 Rms/Ctn (THIS CONTRACT CONTAINS TIER PRICING. YOU MUST ORDER A TOTAL QUANTITY OF 1- 39 CARTONS TO OBTAIN THIS PRICE.) (Contract Line # A1)".



NC E-Procurement Tips & Tricks

ADDING CATALOG FAVORITES

The screenshot displays the ARIBA Spend Management interface. At the top, the logo for NC E-Procurement is visible, along with the ARIBA and SPEND MANAGEMENT branding. The navigation bar includes options like Home, Help, and Logout, and a welcome message for the user. Below the navigation bar, there are tabs for Create, Search, Manage, Recent, and Preferences. The main content area shows a search for 'Paper Husky' with a search bar and a 'Create Non-Catalog Item' button. A sidebar on the left offers filters for 'Refine your results' based on Keyword, Price, and Favorites. The search results show 68 items found, with the first item being 'Paper, Dual Purpose, White, Husky/Quickcopy, ...' priced at \$26.99 USD. Annotations highlight the 'Add to Favorites' button, the 'Organize Favorites...' option, and the 'Organize Favorites...' button in the Favorites section.

Catalog Home
Catalog Search [Options](#) [Create Non-Catalog Item](#)

Supplier Part #:
Contract ID:

Your search path: [Catalog](#) > "Paper Husky"

68 items found [Relevance](#) | [Price](#) | [Name](#) [View: Details](#) | [Thumbnails](#)

[Add to Cart](#) [Compare](#) [Add to Favorites](#) Page [▶](#)

Paper, Dual Purpose, White, Husky/Quickcopy, ... Supplier: [MAC PAPERS INC.](#)
\$26.99 USD [Add to Cart](#) [Add to Favorites](#) [Add](#) [Add To Folders...](#) [Organize Favorites...](#)

Supplier Part #: 1120HXA
Term Contract: 645A
Available in: 20 Day(s)

Paper, Dual Purpose, White, Husky/Quickcopy, Xerographic, 8.5 x 11, 20 lb, Virgin, 10 Rms/Ctn (THIS CONTRACT CONTAINS TIER PRICING. YOU MUST ORDER A TOTAL QUANTITY OF 1- 39 CARTONS TO OBTAIN THIS PRICE.) (Contract Line # A1)

Refine your results
Keyword
virgin (44)
white (44)
xerographic (40)
purpose (40)
dual (40)
Show All ...
Price
\$10.00 - \$100.00 USD (67)
\$100.00 - \$1,000.00 ... (1)
Favorites
- Recent Choices - ▼

The Favorites icon helps users identify which catalog items have been saved to their favorites.

Select 'Organize Favorites' to create folders within your 'Favorites' section.



NC E-Procurement Tips & Tricks

ADDING CATALOG FAVORITES

NC E-Procurement @your service ARIBA* SPEND MANAGEMENT Help

Welcome CC Requester 02

Create Search Manage Recent

Add New Favorites Folders

OK Cancel

Name ↑	Created By	Public	Public To Groups	Public Add	Public Delete
New Folder 2	CC Requester 02	<input type="checkbox"/>	(no value)	<input type="checkbox"/>	<input type="checkbox"/>

New Folder

Click on 'New Folder' and name a new Favorites Folder.

OK Cancel



NC E-Procurement Tips & Tricks

ADDING CATALOG FAVORITES

The screenshot displays the NC E-Procurement interface. At the top, the logo reads "NCE-Procurement @your service" and "ARIBA* SPEND MANAGEMENT". Navigation links include "Home", "Help", and "Logout". A secondary navigation bar contains "Create", "Search", "Manage", "Recent", and "Preferences".

The main content area is titled "Catalog Home" and features a search bar with "Paper Husky" entered. Below the search bar are input fields for "Supplier Part #:" and "Contract ID:". A "Create Non-Catalog Item" button is visible on the right.

On the left, a "Refine your results" sidebar includes sections for "Keyword" (listing terms like "virgin", "white", "xerographic", "purpose", "dual"), "Price" (ranging from \$10.00 to \$1,000.00), and "Favorites" (with a "- Recent Choices -" dropdown).

The search results show 68 items found. The first item is "Paper, Dual Purpose, White, Husky/Quickcopy, ..." from "MAC PAPERS INC." priced at \$26.99 USD. Below the item name are buttons for "Add to Cart", "Compare", and "Add to Favorites". A dropdown menu is open under "Add to Favorites", with "Add To Folders..." highlighted by a dashed circle. A yellow callout box with an arrow points to this option, containing the text: "With a selected favorite, click on 'Add to Folder' to file your favorite away."

Additional details for the selected item include "Supplier Part #: 1120HXA", "Term Contract: 645A", and "Available in: 20 Day(s)". A detailed description at the bottom reads: "Paper, Dual Purpose, White, Husky/Quickcopy, Xerographic, 8.5 x 11, 20 lb, Virgin, 10 Rms/Ctn (THIS CONTRACT CONTAINS TIER PRICING. YOU MUST ORDER A TOTAL QUANTITY OF 1- 39 CARTONS TO OBTAIN THIS PRICE.) (Contract Line # A1)".



NC E-Procurement Tips & Tricks

ADDING CATALOG FAVORITES

NCE-Procurement @your service **ARIBA** SPEND MANAGEMENT **Help**

Welcome CC Requester 02

Create Search Manage Recent

Add Favorites To Folders

Select an existing folder to add items to, or create new folders and then add items. You can make a favorites folder public only if you have the ...

Add Cancel

Add favorite item(s) "Paper, Dual Purpose, White, Husky/Quickcopy, ..." to selected folders.

<input type="checkbox"/>	Name ↑	Created By	Public	Public To Groups	Public Add	Public Delete
<input checked="" type="checkbox"/>	Accounting Favorites	CC Requester 02	<input type="checkbox"/>	(no value)	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	Paper, Dual Purpose, White, Husky/Quickcopy, ...					
<input checked="" type="checkbox"/>	Paper Favorites	CC Requester 02	<input type="checkbox"/>	(no value)	<input type="checkbox"/>	<input type="checkbox"/>

New Folder

Add Cancel

Checking the boxes next to multiple folders will add the item next to each of the selected favorites lists.



NC E-Procurement Tips & Tricks

ADDING CATALOG FAVORITES

The screenshot displays the NC E-Procurement website interface. At the top, the logo reads "NCE-Procurement @your service" and "ARIBA® SPEND MANAGEMENT". Navigation links include "Home", "Help", and "Logout". A secondary navigation bar contains "Create", "Search", "Manage", "Recent", and "Preferences".

On the left side, there are sections for "Supplier" (listing Koch Filter, MAC PAPERS INC., Shoretel, Turf Equipment & ViON Corporation), "Language" (English), and "Favorites". The "Favorites" dropdown menu is open, showing options: "- Recent Choices", "- Recent Choices - My Default Folder", "Accounting Favorites", "Paper Favorites", and "Other...".

The main content area is titled "Catalog Home" and includes a search bar with a "Catalog" dropdown, a "Search" button, and an "Options" link. Below this are input fields for "Supplier Part #" and "Contract ID". A "Browse By: Categories | Suppliers" link and a "Create Non-Catalog Item" button are also present.

Product categories are listed with images and counts: "AGRICULTURAL EQUIPMENT, SUPPLIES & CHEMICALS (6139)", "OFFICE EQUIPMENT & SUPPLIES/PAPER/PRINTING (3559)", "APPLIANCES, ELECTRICAL EQUIPMENT (3229)", and "BUILDING MATERIALS, MAINTENANCE (3278)".

A yellow callout box with black text states: "To view your favorites, click the drop down next to 'Recent Choices' and select the appropriate folder." Arrows point from this box to the "Recent Choices" dropdown and the "Paper Favorites" option.



NC E-Procurement Tips & Tricks

ADDITIONAL TIPS



Copying eRequisitions

NC E-Procurement Tips & Tricks

COPYING eREQUISITIONS

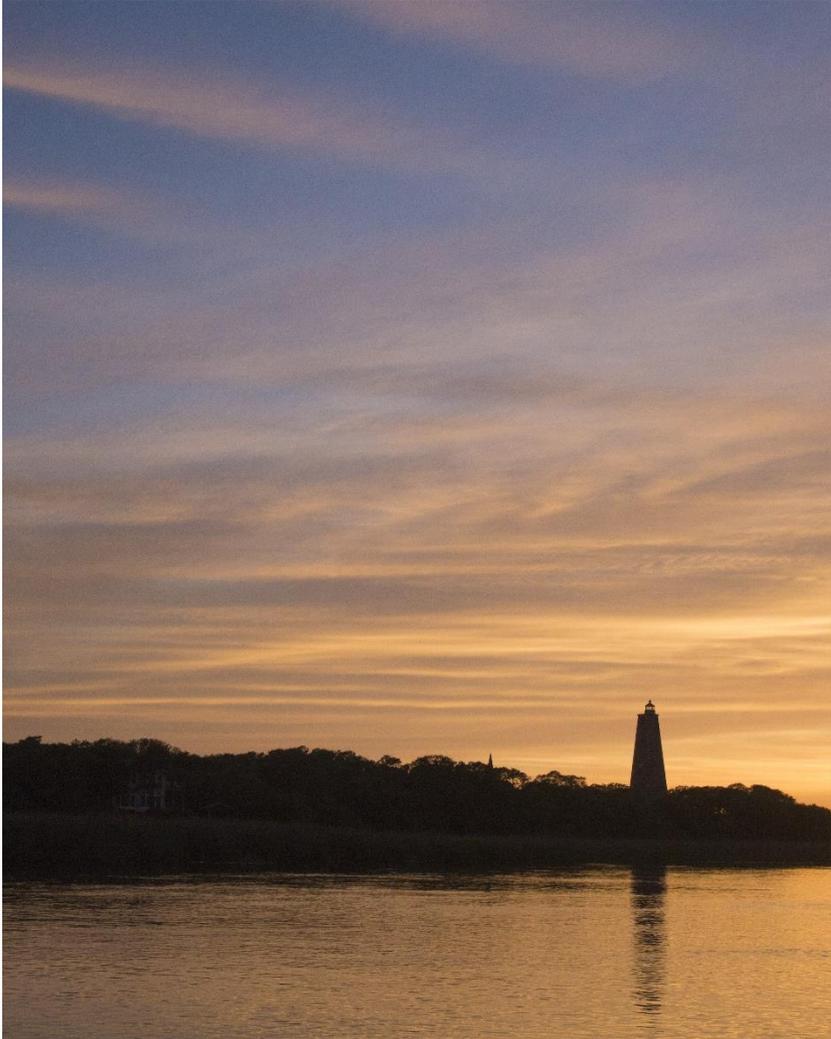
The screenshot displays the NCE-Procurement Ariba Spend Management interface. The top navigation bar includes 'Home', 'Approvals', and 'Welcome CC Requester 01'. The main search area is titled 'Search' and shows 'Type: eRequisition'. A sidebar on the left lists search categories: 'eRequisition', 'View All', 'My Labels' (circled in red), 'My Saved Searches', and 'Public Saved Searches'. The 'My Labels' section shows 'Clay Order (1)'. The search filters section includes fields for Title, ID, Commodity Code, Date Created, Entity, Legacy Document Id, Requester, Status, and Total Cost. The search results section shows 'Found 1 item' and a table with one entry: 'RQ19474916 Clay Order -- Pottery Class' with status 'Approved', date 'Today, 6:25 AM', and total '\$96.30000 USD'. The 'Copy' button for this entry is circled in red.

- Punchout Catalog and eQuote eRequisitions are not able to be copied.



NC E-Procurement Tips & Tricks

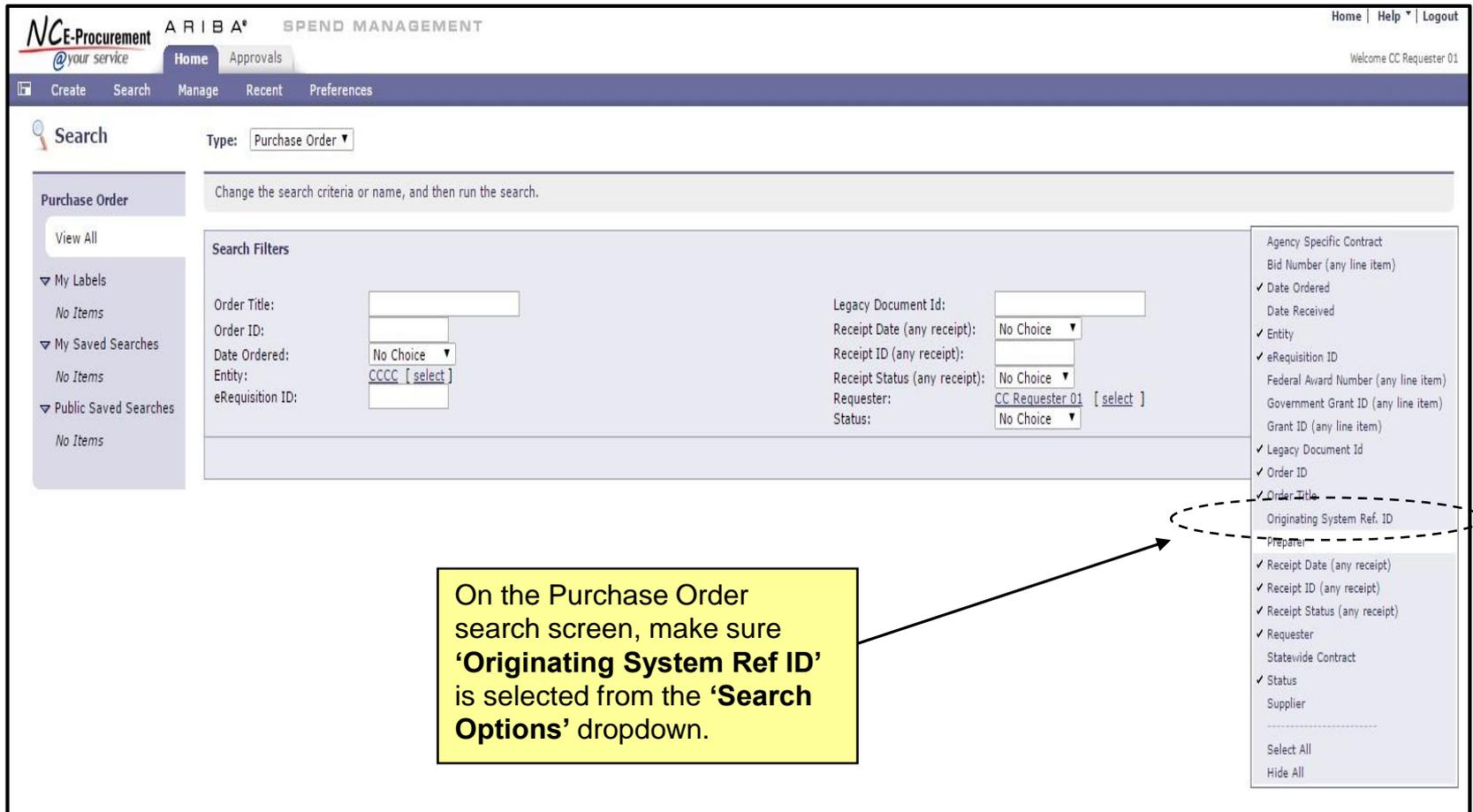
ADDITIONAL TIPS



***SEARCHING BY
'ORIGINATING
SYSTEM REF. ID'***

NC E-Procurement Tips & Tricks

SEARCHING BY 'ORIGINATING SYSTEM REQ. ID'



NC E-Procurement @your service A R I B A* SPEND MANAGEMENT Home | Help | Logout

Welcome CC Requester 01

Create Search Manage Recent Preferences

Search Type: Purchase Order

Change the search criteria or name, and then run the search.

Search Filters

Order Title:

Order ID:

Date Ordered: No Choice

Entity: CCCC [select]

eRequisition ID:

Legacy Document Id:

Receipt Date (any receipt): No Choice

Receipt ID (any receipt):

Receipt Status (any receipt): No Choice

Requester: CC Requester 01 [select]

Status: No Choice

Search Options

- Agency Specific Contract
- Bid Number (any line item)
- ✓ Data Ordered
- Date Received
- ✓ Entity
- ✓ eRequisition ID
- Federal Award Number (any line item)
- Government Grant ID (any line item)
- Grant ID (any line item)
- ✓ Legacy Document Id
- ✓ Order ID
- ✓ **Originating System Ref. ID**
- Prepare
- ✓ Receipt Date (any receipt)
- ✓ Receipt ID (any receipt)
- ✓ Receipt Status (any receipt)
- ✓ Requester
- Statewide Contract
- ✓ Status
- Supplier
-
- Select All
- Hide All

On the Purchase Order search screen, make sure 'Originating System Ref ID' is selected from the 'Search Options' dropdown.



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