



NC E-Procurement Upgrade Go-Live Postcard #13

Non-Integrated Entities Edition

Fun Fact Over 6,000 purchase orders were created in the new NC E-Procurement system in the first week.

Saved Searches System searches are a helpful way to **view dynamic information** in the NC E-Procurement system. If there is a search you use frequently, you can save the search criteria in a Saved Search which will allow you to run it quickly, without resetting the search filters. For example, you can create a Saved Search for your requisitions in 'Submitted' status with the date created set to 'This Week' so you can see your recently created requisitions that are still in the approval flow with just one click. Also note that adding a meaningful title to your requisitions, such as the name of a special project, also allows them to be easily searched. **Select at least three search criteria** when running a search to help the system search efficiently.

NCID Case Sensitivity Some NCID usernames are created with both upper and lower case characters. When you log into the NCID web site it does not verify the case, but the **NC E-Procurement site is case sensitive**. If you are having trouble logging in or wish to change the case of your NCID username in NC E-Procurement, please contact your Security Administrator or the NC E-Procurement Help Desk at 888-211-7440, option 1, or at ephelpdesk@its.nc.gov.

Feature Focus: Customizing your Dashboard The NC E-Procurement Dashboard can be completely rearranged to better fit your needs. Whether you are a requester, an approver, or a receiver, feel free to **'click and drag'** the portlets to the most convenient place on your Dashboard.

This Dashboard has been rearranged to allow the user easier access to their recently created requisitions:

The screenshot shows the NC E-Procurement Home Dashboard. A yellow callout box points to the 'My Documents' portlet at the top of the page, stating: "As a requester, having 'My Documents' at the top of the page allows easier access to requisitions that were recently created." The 'My Documents' portlet displays a table of requisitions:

ID	Title	Date	Status
US2491	Untitled UserMaintenance	7/11/2012	Composing
US1933	Untitled UserMaintenance	7/10/2012	Composing
US1905	Untitled UserMaintenance	7/10/2012	Composing
RQ16023289	Untitled Requisition	7/9/2012	Composing
RQ16020830	Untitled Requisition	7/9/2012	Composing
US1294	Untitled UserMaintenance	7/8/2012	Composing
US1292	Untitled UserMaintenance	7/8/2012	Actioned
US1292	Untitled UserMaintenance	7/8/2012	Actioned

The dashboard also includes a 'Recently Viewed' portlet with a list of requisitions, a search portlet with fields for Catalog, Order ID, and Legacy Document ID, and a 'News' portlet with a welcome message and tips for getting started.

Follow-Up

We sent this postcard to NC E-Procurement NCAS agency users, Purchasing Directors, and Finance Officers.

Questions about information covered in this Postcard? Send an e-mail to: ephelpdesk@its.nc.gov
