



## The Source NC E-Procurement Newsletter

August 2013 Edition

**New Releases** The NC E-Procurement team made updates to NC E-Procurement on August 22, 2013. **Here are some updates from the recent release that might be of interest to you:**

- The approval flow will not regenerate when an eRequisition has been edited by an approver as long as changes to the total dollar amount of the eRequisition have not exceeded the agency's threshold
- The **'Requisitions to be Approved'** report displays the **'Approved Date'**
- User Maintenance eForm menus can display more than 500 values

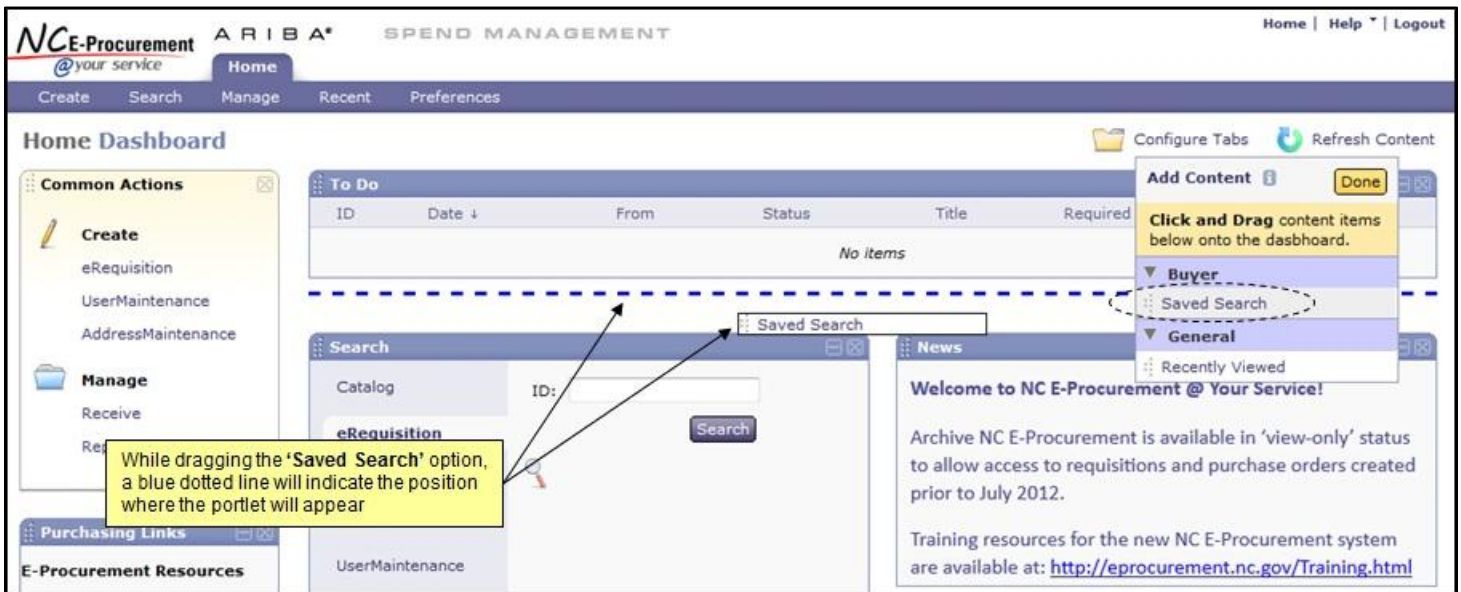
**Tips and Tricks: Saved Search Portlets** If you have Saved Searches that you run within NC E-Procurement, you can make the results of those searches visible within a Dashboard Portlet for easy access. Once a System Search has been saved, take the following steps to add it to the Dashboard.

**Note:** For instructions on how to set up a Saved Search, view the **'System Searches'** job aid located on the NC E-Procurement [User Training](#) page.

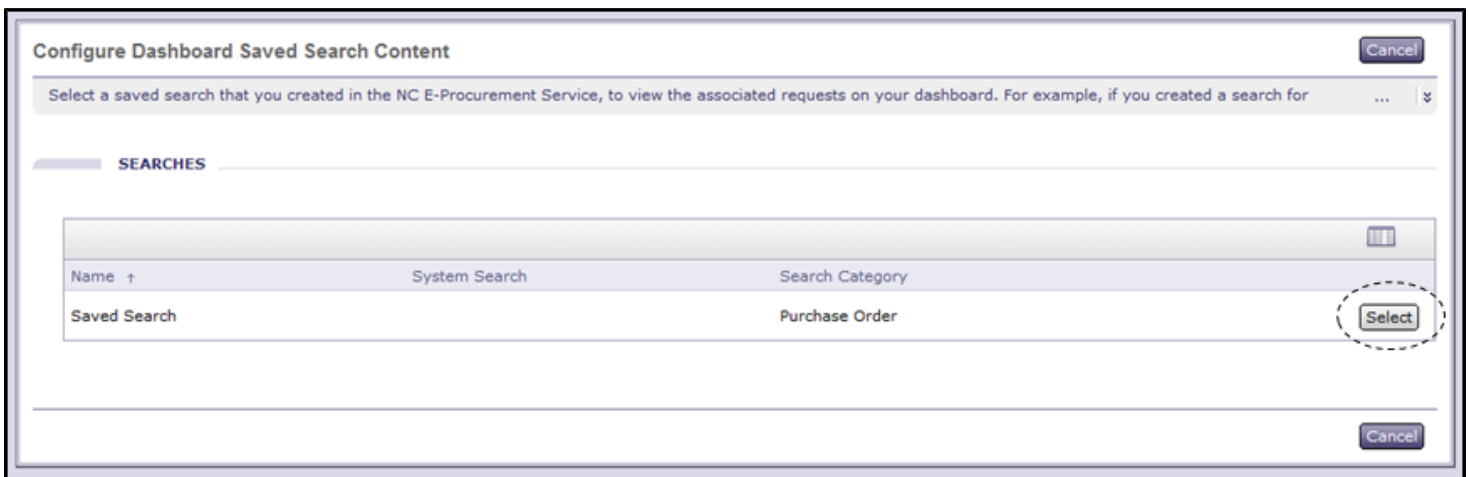
1. From the Dashboard, click **'Configure Tabs'** at the top-right and select **'Add Content.'**

The screenshot displays the NC E-Procurement Home Dashboard. At the top, there is a navigation bar with the logo, 'ARIBA' logo, 'SPEND MANAGEMENT', and user options 'Home | Help | Logout'. Below this is a secondary navigation bar with 'Home' selected, and buttons for 'Create', 'Search', 'Manage', 'Recent', and 'Preferences'. The main dashboard area is titled 'Home Dashboard' and contains several portlets: 'Common Actions' (with 'Create' and 'Manage' sections), 'To Do' (a table with columns ID, Date, From, Status, Title, and Rec, currently showing 'No items'), 'Search' (with a search bar and filters for 'eRequisition', 'Purchase Order', and 'Receipt'), and 'News' (with a welcome message). A 'Configure Tabs' menu is open in the top right corner, showing options like 'Current Tab', 'Add Content', 'Edit Properties', 'Delete Tab', and 'Tab Set Options'. The 'Add Content' option is circled in red.

2. Click and drag **'Saved Search'** to the preferred location on the Dashboard and release the mouse button.



3. A new page will appear. Click the **'Select'** button next to the desired saved search.



4. The portlet for the Saved Search will now appear on the Dashboard. Click **Done** to finish updating the Dashboard.

The screenshot shows the NC E-Procurement dashboard interface. At the top, there is a navigation bar with 'Home', 'Help', and 'Logout' links. Below this is a secondary navigation bar with 'Create', 'Search', 'Manage', 'Recent', and 'Preferences' options. The main content area is divided into several sections. On the left, there is a 'Home' section with a 'Create' menu (eRequisition, UserMaintenance, AddressMaintenance) and a 'Manage' menu (Receive, Reports). Below these are 'Purchasing Links' and 'E-Procurement Resources'. The central part of the dashboard features a 'Saved Search' portlet. Above it, there is a table with columns 'ID', 'Date', 'From', 'Status', 'Title', and 'Required', which currently displays 'No Items'. The 'Saved Search' portlet itself contains a table with columns 'Order ID', 'Type', 'Date Created', 'Status', 'Title', and 'Required'. A yellow callout box points to the 'Saved Search' portlet with the text: 'The 'Saved Search' portlet will appear on the Dashboard'. On the right side, there is an 'Add Content' menu with a 'Done' button circled in red. A yellow callout box points to the 'Done' button with the text: 'Click and Drag content items below onto the dashboard.' The 'Add Content' menu lists categories like 'Buyer' and 'General', with sub-items like 'Saved Search' and 'Recently Viewed'.

ID	Date ↓	From	Status	Title	Required
No Items					

Order ID	Type	Date Created	Status	Title	Required
<a href="#">DO8363195</a>		7/25/2013	Ordered	86100002988_14	\$32.26 USD
<a href="#">DO8360770</a>		7/23/2013	Ordered	Noevere-Cert.Presentation_copyholder	\$15.41 USD
<a href="#">NC10086953</a>		7/23/2013	Ordered	G - POST IT NOTES HMH	\$1,676.50 USD
<a href="#">NC10088816</a>		7/31/2013	Ordered	OFFICE SUPPLY CATALOG (PUNCHOUT)	\$40.20 USD
<a href="#">DO8363199</a>		7/25/2013	Ordered	86100002992_14	\$137.13 USD
<a href="#">NC10086984</a>		7/23/2013	Ordered	G-STAPLES HMH	\$288.00 USD

**Note:** To update the data displayed in the portlet, click the **'Refresh Content'** button. Please review the **'System Navigation'** job aids on the NC E-Procurement [User Training](#) page for more information.

## Follow-Up

This newsletter was sent to all Community College and School System users.

Questions about information covered in this Newsletter? Send an e-mail to: [ephelpdesk@its.nc.gov](mailto:ephelpdesk@its.nc.gov)