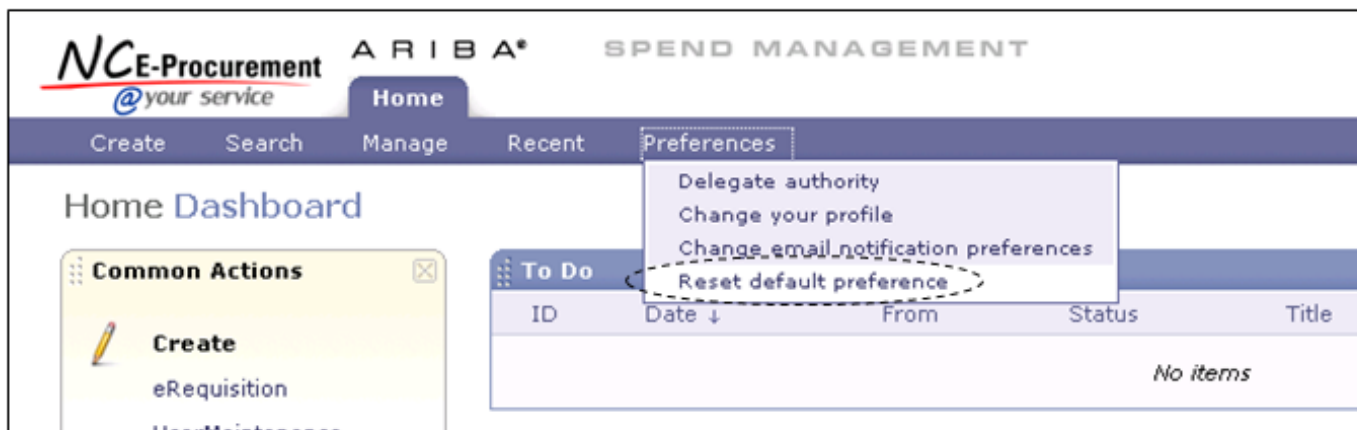# *The Source* NC E-Procurement Newsletter

March 2013 Edition

Entering eRequisition Titles Entering a title on an eRequisition is an important step for many entities. The **'Title'** field can be found on the **'Summary'** page of an eRequisition. The NC E-Procurement system default is for this page to display after adding the first item to the eRequisition. However, did you know that you have the option to set your preferences such that the page with the **'Title'** field is the first page you see when creating an eRequisition? If you would like to enter a title as the first step in creating all of your eRequisitions, there are only two steps to take in order to change your default preferences**:**

1. Click **'Preferences'** on the Menu Bar at the top and select **'Reset default preference'**

2. Uncheck the **'Show catalog on requisition creation'** box and click **'OK'**

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	☐
Show confirmation page before deleting a request	☑
Expand Item Details	☑
Show additional information before going to the receiving summary page	☑
Show catalog on requisition creation	☑
Display catalog item images	☑
Show confirmation page before editing a request	☐
Show Navigation Panel	☑
Receive email notifications in plain text format	☐
Receive email notifications in compact text format	☐

Uncheck the 'Show catalog on requisition creation' box

[Reset] [OK] [Cancel]

Note: For further information regarding default preferences, please view the **'Reset Default Preferences'** job aid on the NC E-Procurement training web site.

Cleaning Up User Accounts Before They Leave A user cannot be deleted or switched to another entity unless they have no outstanding items. As such, before a user leaves, please ensure they have completed the following actions for eRequisitions they created:

- Delete all eRequisitions in **'Composing'** status

- Withdraw and delete all eRequisitions in **'Denied'** or **'Submitted'** status. If the items on these eRequisitions are still needed, please have another

user submit a new eRequisition

Note: For instructions on updating or deleting user profiles, please view the **'User Maintenance'** job aid on the NC E-Procurement training web site.

Grouping Search Results It is possible to group search results by specific criteria in order to better review the results. For example, the search results of an eRequisition search can be grouped together by status (**'Composing,' 'Submitted,'** etc.). Once the search results have been grouped, it is then possible to expand each group to review the items in that category.

1. After initiating a search and retrieving the search results, click the **'Table Options Menu'** icon at the top of the **'Search Results'** box

2. In the menu that appears, click the specific criteria by which the search results are to be reviewed in the **'Group by Column'** section
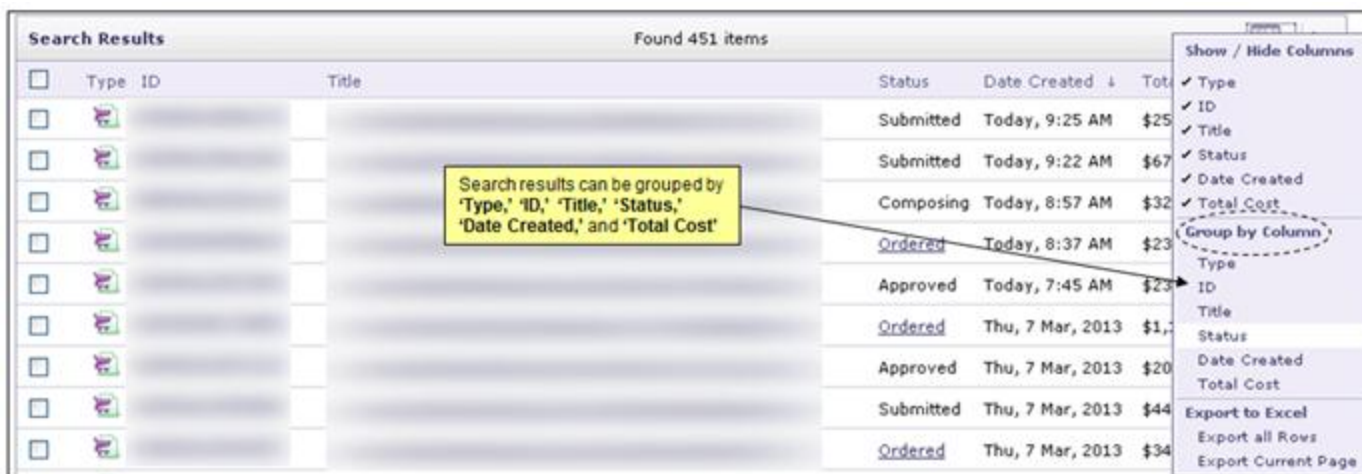
3. Once the results are grouped, click the arrow next to a group to review the specific items that fall into that group
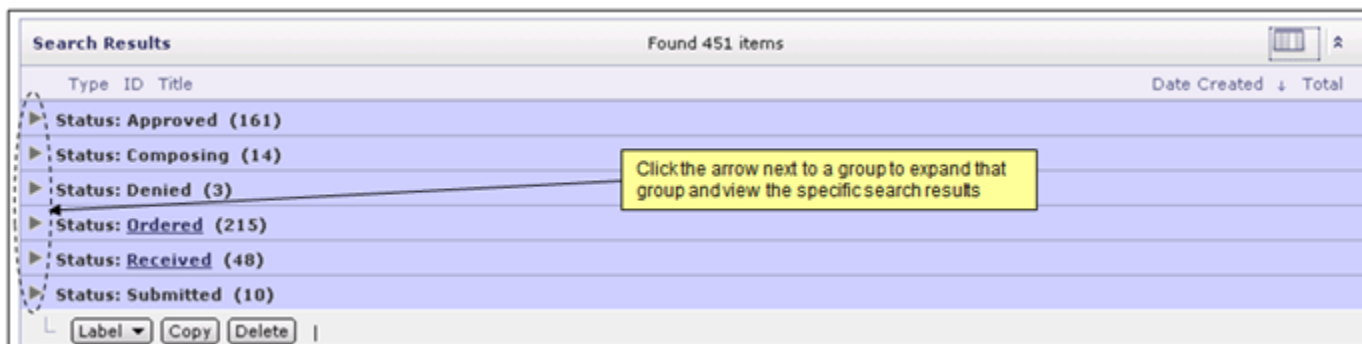
Note: For instructions on running system searches, please view the **'System Searches'** job aid on the NC E-Procurement training web site.

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