

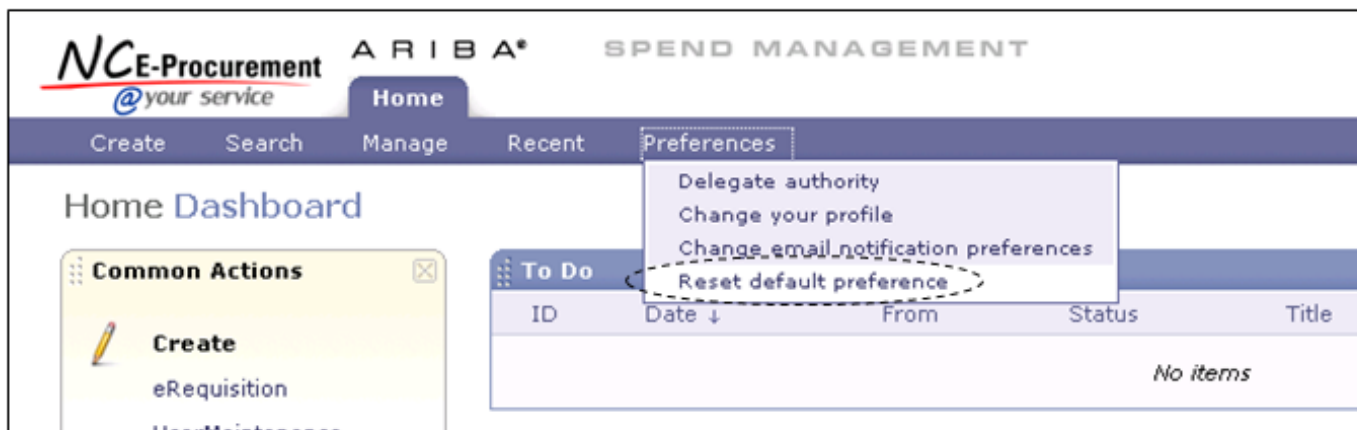


The Source NC E-Procurement Newsletter

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'**
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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 checked="" 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 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"/>

Buttons:

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

- Fully receive any eRequisitions in **'Receiving'** status. If receiving is still ongoing for a specific eRequisition, a Purchasing Agent may create a change order to change the **'On Behalf Of'** field to another user who will then be able to continue receiving on the eRequisition, and the user can then be deleted without the need to fully receive the eRequisition
- Cancel or fully receive any eRequisitions in **'Ordered'** status
- Resolve all issues for any eRequisitions in **'Failed'** status

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

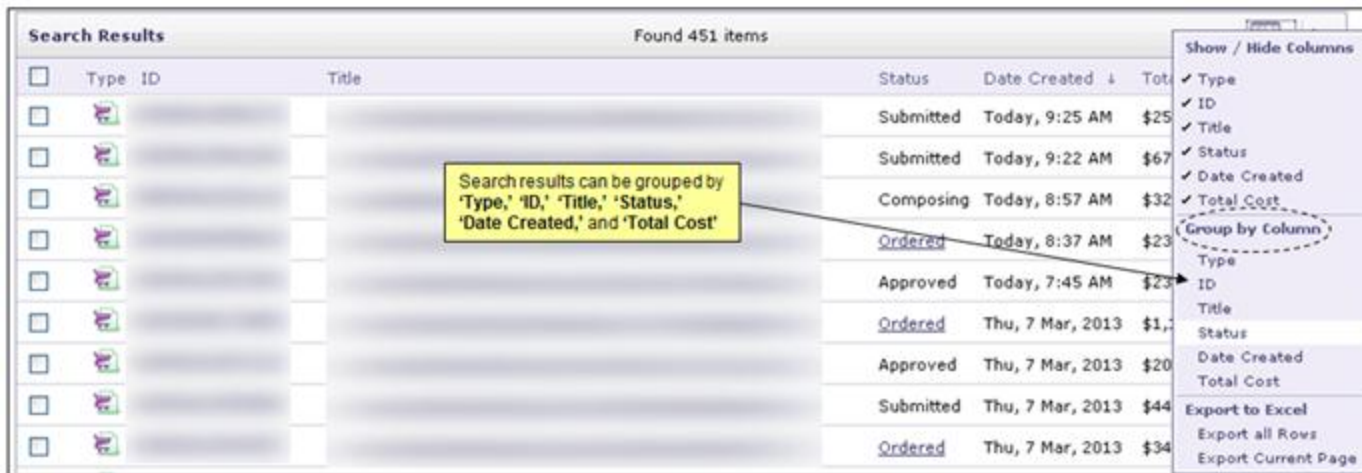
The screenshot displays the search interface for eRequisitions. It is divided into two main sections: 'Search Filters' and 'Search Results'.

Search Filters: This section contains various input fields and dropdown menus for refining the search. Fields include Title, ID, Commodity Code (any line item), Date Approved, Date Created, Description (any line item), Federal Award Number (any line item), Legacy Document Id, Preparer, Requester, Status, Supplier (any line item), and Total Cost. A yellow box labeled 'Table Options Menu' points to a small icon in the top right corner of the search results table.

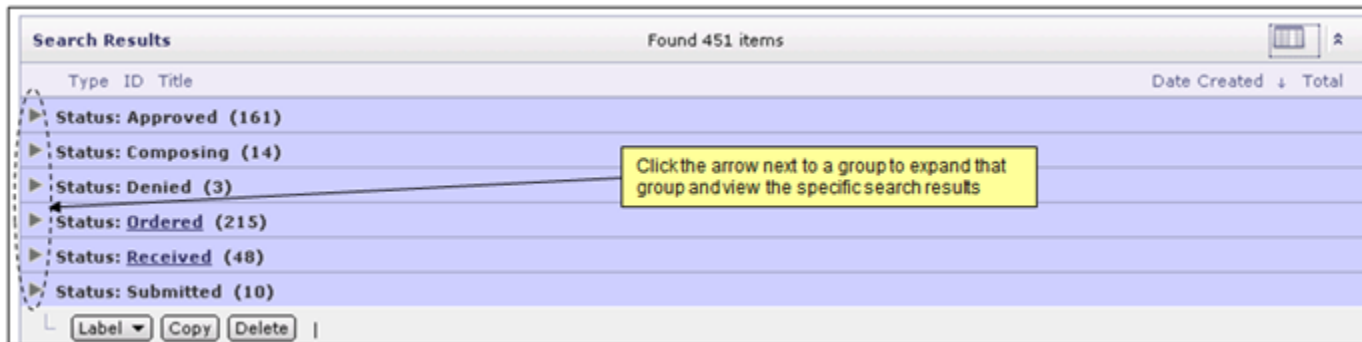
Search Results: This section shows the results of the search, indicating that 451 items were found. The results are displayed in a table with columns for Type, ID, Title, Status, Date Created, and Total. Two items are visible in the table:

Type	ID	Title	Status	Date Created	Total
			Submitted	Today, 9:25 AM	\$256.39000 USD
			Submitted	Today, 9:22 AM	\$674.38000 USD

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
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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 NCAS users.

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

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