

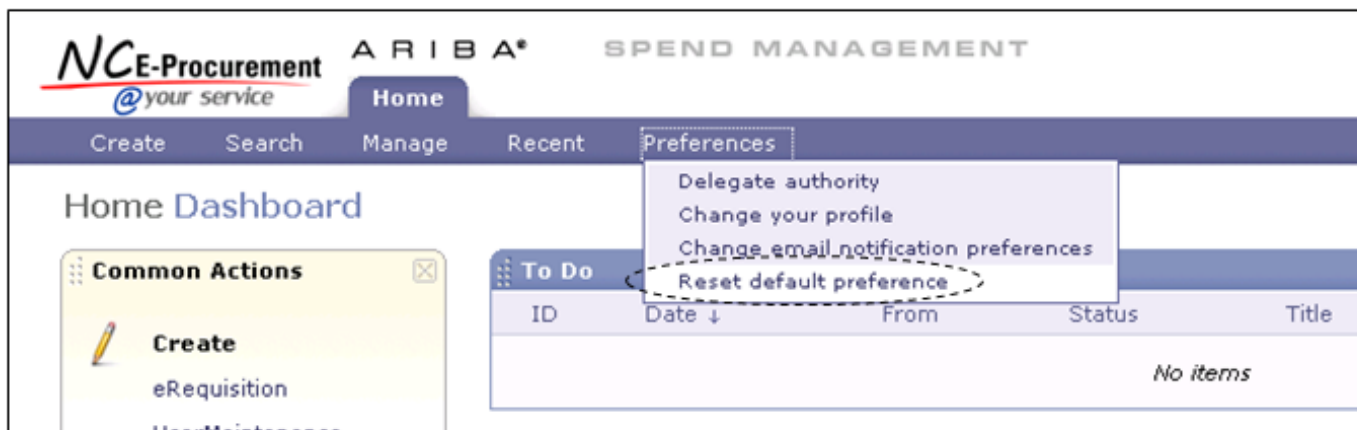


The Source NC E-Procurement Newsletter

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'**
-

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

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

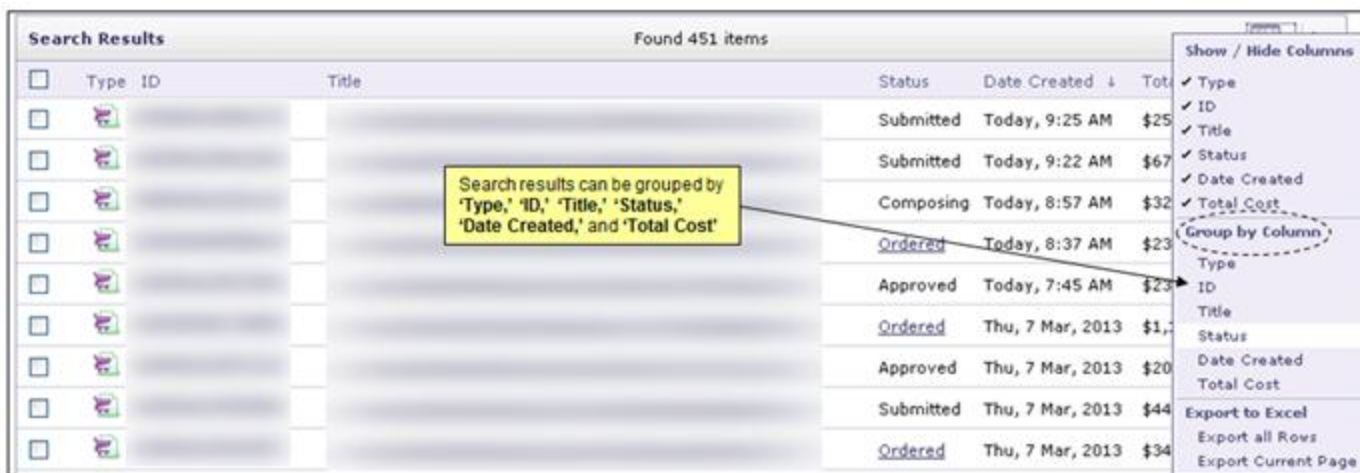
Grouping Search Results It is possible to group search results by specific criteria in order to better review the results. For example, the search results of an eRequisition search can be grouped together by status (**'Composing,' 'Submitted,'** etc.). Once the search results have been grouped, it is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

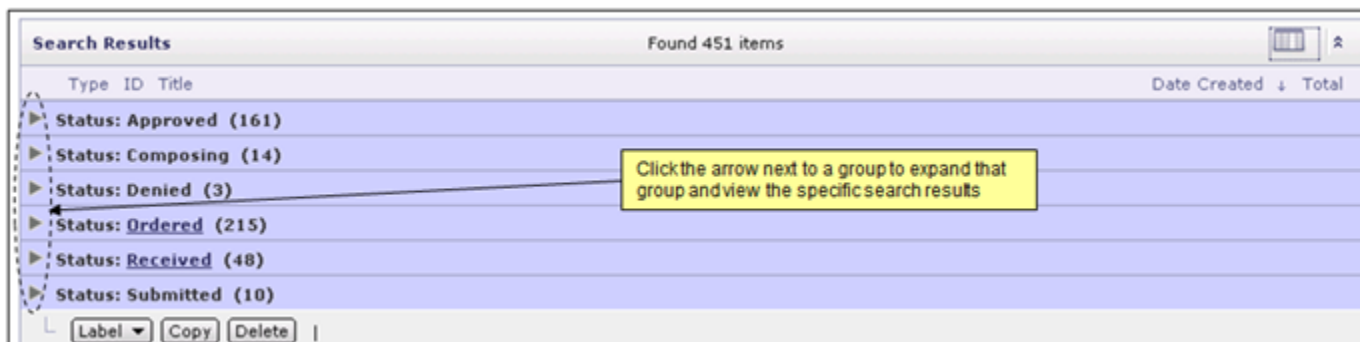
The screenshot displays the search interface with the following elements:

- Search Filters:** Includes fields for 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 table icon in the search results section.
- Search Options:** A link in the top right corner.
- Search Results:** A table with columns: Type, ID, Title, Status, Date Created, and Total. It shows 451 items found. Two items are visible: one Submitted on Today, 9:25 AM for \$256.39000 USD, and another Submitted on Today, 9:22 AM for \$674.38000 USD.
- Buttons:** Search, Reset, and Save Search buttons are located below the filters.

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 NC E-Procurement users from non-integrated entities.

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

E-mail correspondence to and from this address may be subject to the North Carolina Public Records Law and may be disclosed to third parties by an authorized state official.