



The Source NC E-Procurement Newsletter

September 2013 Edition

Logging In with NCID All users log into NC E-Procurement using NCID, the State's common identity management service. NCID provides a single user ID and password that can be used to log into multiple systems. Everyone who uses NC E-Procurement must have an active NCID in order to log into the system. **Here are some common NCID error messages associated with logging into NC E-Procurement:**

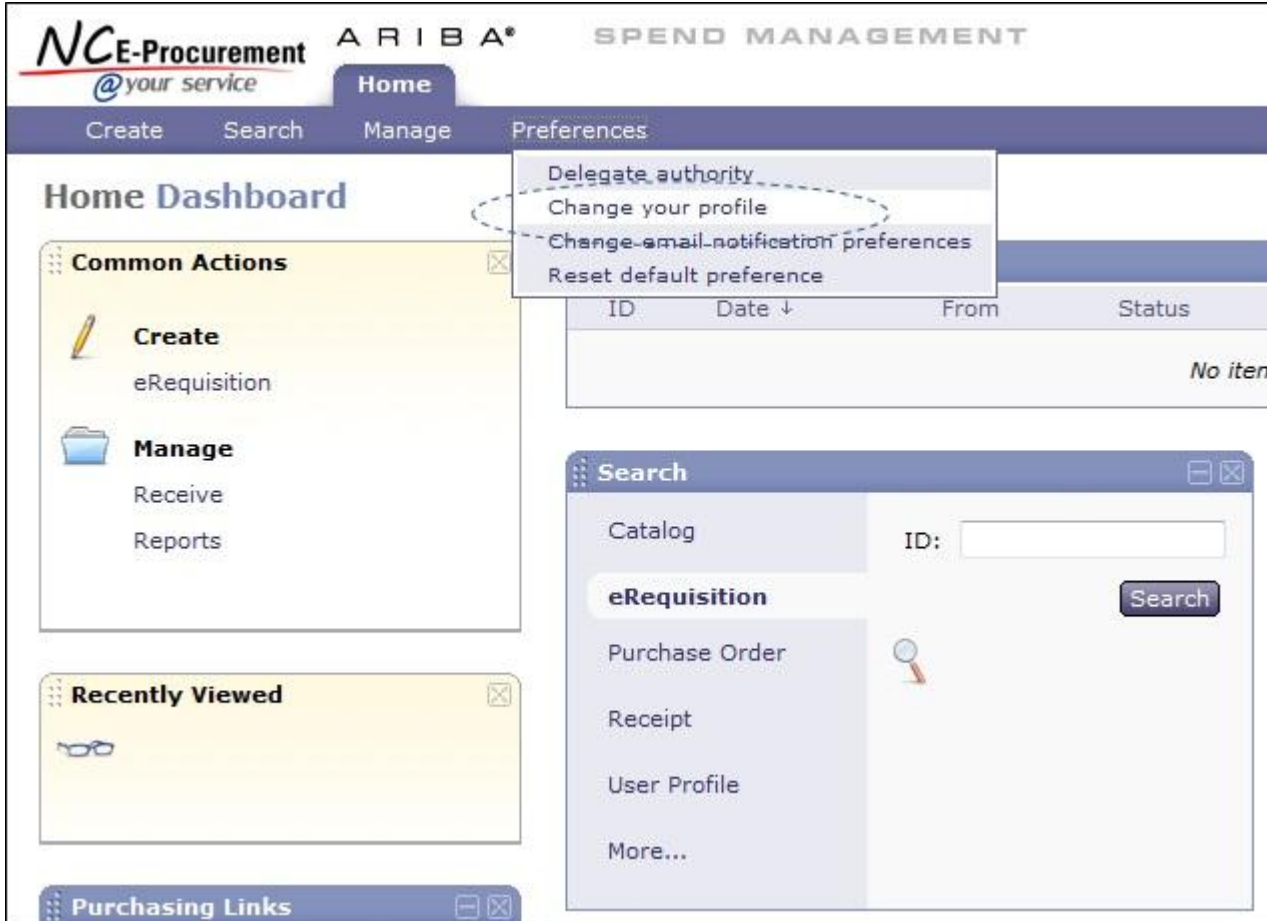
- **Invalid username or password. Re-enter your username or password.** You have entered an incorrect NCID User ID and/or password. Please visit the NCID web site at <https://ncid.nc.gov> and confirm whether you are able to log in. If you are successful in logging into NCID, please contact the NC E-Procurement Help Desk at 888-211-7440, option 1, or ephelpdesk@its.nc.gov for assistance. If you are unsuccessful in logging into NCID, please contact your Delegated Administrator.
- **Your NCID password has expired.** NCID passwords expire every 90 days unless they are reset. If this message is received, please contact your Delegated Administrator.
- **Your NCID account has been locked.** NCID passwords lock after 3 unsuccessful login attempts. If this message is received, you may wait an hour and try again or contact your Delegated Administrator.

Note: If you do not know who your entity's Delegated Administrator is, please contact your EP Lite Administrator. If you do not know who your entity's EP Lite Administrator is, you may contact the NC E-Procurement Help Desk at 888-211-7440, option 1, or ephelpdesk@its.nc.gov.

For more information regarding how NC E-Procurement and NCID work together, view the '**Resetting User Passwords**' job aid located on the NC E-Procurement [User Training](#) page.

Tips and Tricks: Setting Default Values If you are a requester and use the same accounting, billing, and/or shipping information on a majority of your eRequisitions, you can save time by setting those fields to automatically populate on each new eRequisition you create:

1. From the Dashboard, click **'Preferences'** at the top and select **'Change your profile.'**



2. On the **'Personal Info'** page, select the desired **'Bill To'** address to be the default value for all new eRequisitions and click the **'Next'** button.

UP4678: EPLite_User EPLite_User

Personal Profile

1 Personal Info
2 Account/Ship
3 Justify Changes
4 Approval Flow
5 Review Changes

Your Personal Profile contains information that is specific to you, including your accounting, shipping, and organization ...

PERSONAL PROFILE INFORMATION - USER PROFILE

Name: * EPLite_User EPLite_User
Business Email Address: * EPLite_User@testagency.nc.gov
Supervisor: EPLite_Supervisor EPLite
Bill To: * Bill To
Groups: (no value)
Roles: EPLite Requester
Permissions: (no value)

(*) indicates a required field

Next Exit

3. On the **'Account/Ship'** page, select the desired **'Account Code,' 'Ship To'** address, and **'Deliver To'** name to be the default values for all new eRequisitions and click the **'Next'** button.

UP4628: EPLite_User EPLite_User

Personal Profile

1 Personal Info
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5 Review Changes

The accounting and shipping information is used as the default account to which the items you order are charged, and the ...

1. Change your accounting information:
ERP Organization: LEAI
Entity: LCAL
Account Code: 1234

2. Change your shipping and delivery information:
Ship To: * Ship To
Deliver To: EPLite User

(*) indicates a required field

Prev Next Exit

4. On the 'Justify Changes' page, enter a comment, if desired, and click the 'Next' button.

Personal Profile

UP4628: EPLite_User EPLite_User

1 Personal Info

2 Account/Ship

3 Justify Changes

4 Approval Flow

5 Review Changes

Enter comments explaining why you are changing your personal profile.

COMMENTS - ENTIRE USER PROFILE

Updating user profile default values.

Comments:

ATTACHMENTS - ENTIRE USER PROFILE

Add Attachment

(*) indicates a required field

Prev Next Exit

5. Review the approval flow and click the 'Next' button.

Personal Profile

UP4628: EPLite_User EPLite_User

1 Personal Info

2 Account/Ship

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4 Approval Flow

5 Review Changes

Review the approvers assigned to review the request. Add and delete approvers as necessary, depending on your permissions.

APPROVAL FLOW - USER PROFILE

There are no approvals required.

Add Approver

If a supervisor is required to approve the profile changes, they will appear here

(*) indicates a required field

Prev Next Exit

- Review all the changes made for accuracy and click the **'Submit'** button. If any further updates need to be made, click the **'Prev'** button to return to the appropriate page and complete the updates.

UP4628: EPLite_User EPLite_User

Personal Profile

1 Personal Info

2 Account/Ship

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5 Review Changes

Review your request and then submit it for approval.

Change	From	To
Account Code		1234
Deliver To	EPLite_User EPLite_User	EPLite User

(*) indicates a required field

Prev Submit Exit

Note: If there is an approval flow, the user profile changes will not take effect until all approvals have been completed.

- When a new eRequisition is created, the **'Accounting'** and **'Shipping'** fields will be automatically populated based on the values set in the previous steps.

ACCOUNTING - BY LINE ITEM

Bill To: * Bill To

Entity: LCAL

Account Code: 1234

SHIPPING - BY LINE ITEM

Ship To: * Ship To

Deliver To: * EPLite User

Need-by Date: [Calendar Icon]

Shipping Method: * Best Way

FOB Code: * Destination

Terms of Payment: * Net 30 Days

These fields will be automatically populated based on the default values set in the previous steps

Note: For more information regarding user profile changes and preferences, please review the **'System Navigation'** job aids on the NC E-Procurement [User Training](#) page.

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