



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:**

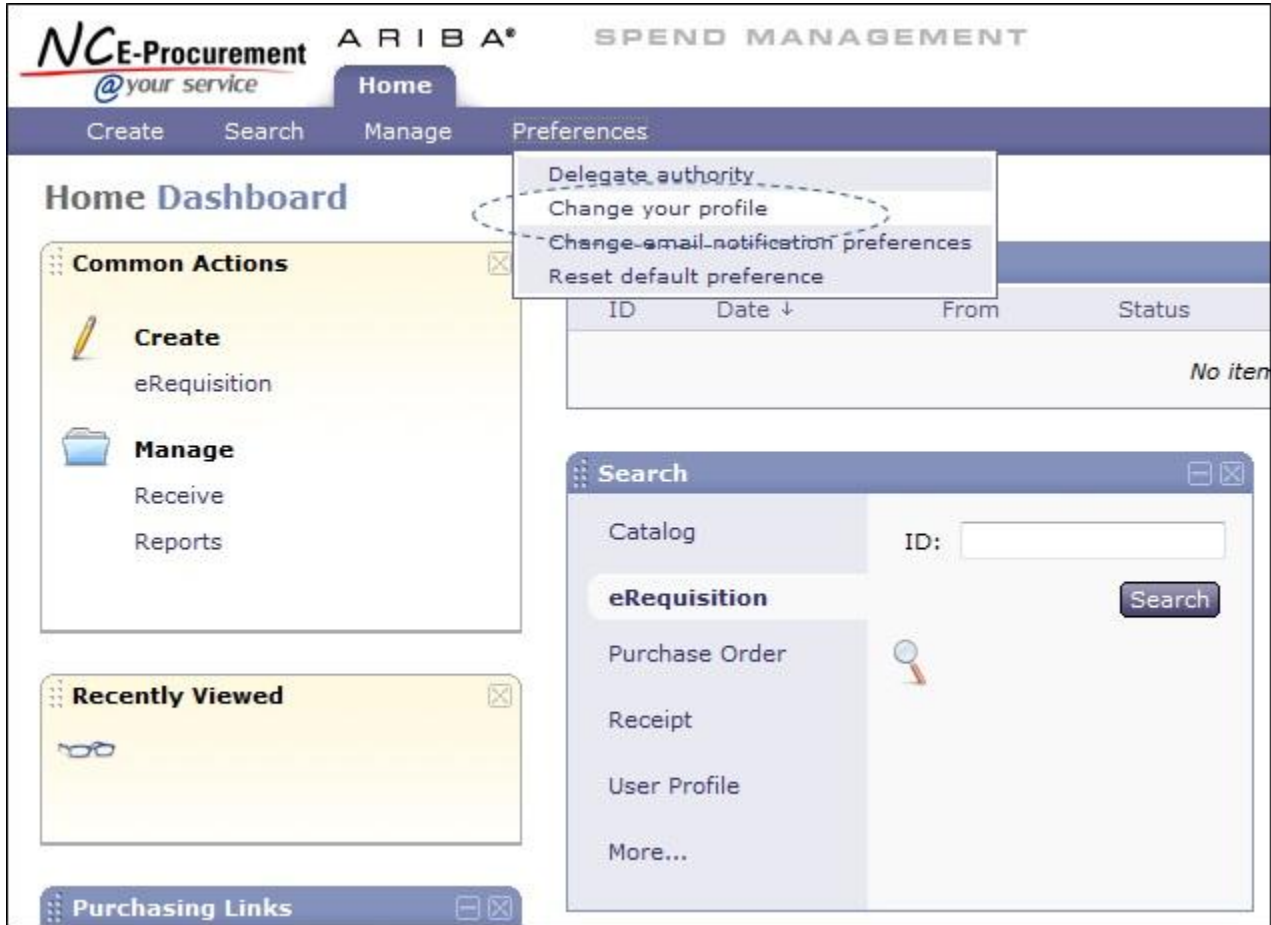
- **Invalid username or password. Re-enter your username or password.** You have entered an incorrect NCID User ID and/or password. Please visit the NCID web site at <https://ncid.nc.gov> and confirm whether you are able to log in. If you are successful in logging into NCID, please contact the NC E-Procurement 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 Security Administrator. If you do not know who your entity's Security 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 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.'



- 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.

UP4682: Non-Integrated_User Non-Integrated_User

Personal Profile

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

PERSONAL PROFILE INFORMATION - USER PROFILE

Name: * Non-Integrated_User Non-Integrated_User

Business Email Address: * Non-Integrated_User@testagency.nc.gov

Supervisor: Non-Integrated_Superv

Bill To: * Bill To

Groups: (no value)

Roles: Non-Integrated Requester

Permissions: (no value)

(*) indicates a required field

Next Exit

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

UP4630: Non-Integrated_User Non-Integrated_User

Personal Profile

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: 100

Entity: CFPTA

2. Change your shipping and delivery information:

Ship To: * Ship To

Deliver To: Non-Integrated User

(*) indicates a required field

Prev Next Exit

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

UP4630: Non-Integrated_User Non-Integrated_User

Personal Profile

- 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

Comments: Updating user profile default values.

ATTACHMENTS - ENTIRE USER PROFILE

Add Attachment

(*) indicates a required field

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

UP4631: Non-Integrated_User Non-Integrated_User

Personal Profile

- 1 Personal Info
- 2 Account/Ship
- 3 Justify Changes
- 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

- 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.

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.

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 NC E-Procurement users from non-integrated entities.

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