



## Personal Labels Process Guide

Each user within NC E-Procurement has access to Labels. These Labels can be used to organize eRequisitions, purchase orders, and other approvables. Each user has a default label of **'Archive Items,'** and has the ability to create more labels to identify and sort their approvables.

**'Labels,'** in the new version of Ariba Buyer for NC E-Procurement, are similar to **'Folders'** in the previous version. Unlike Folders, there are no **'Sub-Labels'** in the new version of Ariba Buyer, as there were for folders in the past version. However, multiple Labels *can* be added to a single approvable for further identification.

It is important to keep in mind that while Labels can be a very useful tool for organizing and locating items within NC E-Procurement, most times a system search will be more effective and efficient at pulling back information. Labels should be used sparingly, if possible, and only in situations where a system search will not do the job.

### When Should I Use System Searches?

A user should use system searches *instead* of labels in scenarios where there is a shared characteristic across all of the approvables in the group. For example, if the user would like to quickly locate all of the requisitions for one supplier, they should use System Searches instead of labels. System Searches are a more reliable tool because it is not dependent on an action by the user (e.g., assigning a label to a requisition). System Searches pull back data with less initial work from the user, and with better performance. Another example in which a system search is more logical would be for transactions in a given time frame, such as the past quarter. The items all share a common characteristic, the time frame, and it is more efficient and requires less upfront work to perform a system search. Searches can be saved for specific suppliers or time frames, and are a quick and easy way to pull back items with a common data point. For more information about creating, saving, and executing system searches, please refer to the **'System Searches'** process guide.

### When Should I Use Labels?

A user should apply a label to an item when it is something that they need to be able to access quickly but that may not share a common search field with the other items that are in the same label. *If any common searchable characteristic, such as supplier or time frame, is shared, System Searches should be utilized.* One example would be requisitions or purchase orders that are recurring monthly, for which one requisition may serve as a template. The template requisitions should have a label applied to them so that they can be located quickly. Labels can also be used for groups such as **'High Priority Items,'** that may not have a common characteristic other than being high priority. Once the item has been completed and is no longer high priority, the label should be removed. Lastly, labels are a good way to group together approvables that are all related to the same event, such as requisitions relating to a declared emergency. In this situation, the items do not have a common characteristic other than the fact that they all are related to the same event. It is very important to keep in mind that users should not use Labels when a system search will suffice, as system searches are more reliable, as they are not dependent on the action by the user (e.g., assigning a label to a requisition) and have better performance.



## I. Adding Items to Labels from Search Results

1. From the Ariba Dashboard, perform a system search that will return the items to which you would like to assign a Label. To do this, populate the criteria fields and click **'Search.'** For more information on System Searches, please see the **'System Searches'** process guide.

**Note:** The searches that will return items that can be labeled are: eRequisition, Purchase Order, Receipt, User Profile, User Maintenance, and Address Maintenance.

The screenshot shows the NCE-Procurement Ariba Spend Management dashboard. The top navigation bar includes 'Home', 'Search', 'Manage', 'Recent', and 'Preferences'. The 'Search' menu item is circled in red. The dashboard features several widgets: 'Common Actions' with 'Create' (eRequisition) and 'Manage' (Receive, Reports); 'To Do' with a table showing 'No items'; 'Search' with a search form for 'eRequisition' and 'My Saved Searches'; 'News' with a 'Welcome to NC E-Procurement Version 2.0!' message; and 'Purchasing Links' with various resource links.

2. Once the search is returned, check the box next to the item to which you would like to apply a Label, and click 'Label.'
3. The 'Apply Label' options will appear. If you have not previously created any Labels, only 'Archive Items' and 'New Label' will appear as options.
4. To assign the item to the 'Archive Items' Label, click the 'Archive Items' option.
5. To create a new Label and assign the item to that Label, click 'New Label.'

The screenshot shows the NCE-Procurement search interface. The search type is set to 'Purchase Order'. The search filters section includes fields for Order Title, Order ID, Date Ordered, Entity, eRequisition ID, and Legacy Document ID. The search results section shows two items:

Legacy Document ID	Order ID	Type	Title	Status	Date Created	Supplier Name	Total
<input checked="" type="checkbox"/>	NC5000076	Requestor Approvable	NCAS Requestor Approvable	Ordered	Today, 12:34 PM	B.W.Wilson Paper Co.	\$48.45000 USD
<input type="checkbox"/>	NC5000056	Change Order	Change Order Test	Ordered	Tue, 28 Feb, 2012	Mustang Aviation Inc	\$10.00000 USD

A yellow callout box with the text "Assign a Label by checking the box next to an approvable and then clicking 'Label.'" points to the checked checkbox and the 'Label' dropdown menu in the search results table.



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- Once **'New Label'** is clicked, an **'Add Label'** pop-up window will appear.
- Enter the Label name in the **'Enter New Label'** field and click **'OK'**.
- Once the new Label is named and you click **'OK,'** you will be returned to the **'Search'** page.
- The new Label will appear on the left hand side of the page under **'My Labels.'**

The screenshot displays the NCE-Procurement ARIBA Spend Management interface. The top navigation bar includes 'Home', 'Help', and 'Logout'. The main content area is titled 'Search' and shows a search for 'Purchase Order'. A pop-up window titled 'Add Label' is open, allowing the user to enter a new label name. The 'Enter New Label' field contains 'NCAS Requestor Label'. The 'OK' button is highlighted with a dashed circle. Below the pop-up, the search results table shows two items:

Legacy Document ID	Order ID	Type	Title	Status	Date Created	Supplier Name	Total
<input checked="" type="checkbox"/>	NC5000076		Requestor Approvable	Ordered	Today, 12:34 PM	B.W.Wilson Paper Co.	\$48.45000 USD
<input type="checkbox"/>	NC5000056		Change Order Test	Ordered	Tue, 28 Feb, 2012	Mustang Aviation Inc	\$10.00000 USD



## II. Adding Labels from Approvables

1. From the Ariba Dashboard, perform a system search that will return the items to which you would like to assign Labels. To do this, populate the criteria fields and click **'Search.'**

**Note:** The searches that will produce items that can be labeled are: eRequisition, Purchase Order, Receipt, User Profile, User Maintenance, and Address Maintenance.

The screenshot shows the NCE-Procurement Ariba Spend Management Home Dashboard. The top navigation bar includes 'Home | Help \* | Logout' and 'Welcome NCAS Requestor'. The main dashboard area is divided into several sections:

- Common Actions:** Includes 'Create' (eRequisition) and 'Manage' (Receive, Reports).
- Recently Viewed:** Lists items such as 'RQ20000602 N...or Approvable', 'RQ20000591 U...d Requisition', 'RQ20000322 U...d Requisition', 'NC5000056 Change Order Test', and 'RQ20000382 U...d Requisition'.
- To Do:** A table with columns 'ID', 'Date ↓', 'From', 'Status', 'Title', and 'Required Action'. It currently shows 'No items'.
- Search:** A form with fields for 'Catalog', 'Order ID', 'Legacy Document', and 'Id'. A 'Search' button is circled in red.
- News:** A 'Welcome to NC E-Procurement Version 2.0!' message with a note to visit the NCEP Home Page for job-aids and training opportunities.
- Purchasing Links:** A list of links including 'NC @ Your Service Portal', 'Customer Service', 'Punchout Catalog Availability', 'Registered Vendor Search', 'Purchase & Contract', and 'IT Procurement'.



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2. Once the search is returned, click on either the approvable ID or the approvable Title.

Home | Help | Logout  
Welcome NCAS Requestor

ARIBA®
SPEND MANAGEMENT

Home
Create Search Manage Recent Preferences

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**Search**
Type: Purchase Order

Change the search criteria or name, and then run the search.

**Search Filters**
[Search Options](#)

Order Title:   
 Order ID:   
 Date Ordered: No Choice   
 Entity: 41   
 eRequisition ID:   
 Legacy Document Id:

Receipt Date (any receipt): No Choice   
 Receipt ID (any receipt):   
 Receipt Status (any receipt): No Choice   
 Requester: NCAS Requestor   
 Status: No Choice   
 Supplier (any line item): (select a value)

**Search Results**
Found 2 items

Legacy Document ID	Order ID	Type	Title	Status	Date Created	Supplier Name	Total
<a href="#">NCS000076</a>			<a href="#">Requestor Approvable</a>	Ordered	Today, 12:34 PM	B.W.Wilson Paper Co.	\$48.45000 USD
<a href="#">NCS000056</a>			<a href="#">Order Test</a>	Ordered	Tue, 28 Feb, 2012	Mustang Aviation Inc	\$10.00000 USD



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3. Click 'Apply Label.'

The screenshot shows the ARIBA SPEND MANAGEMENT interface. At the top, it says 'NCE-Procurement @your service' and 'ARIBA\* SPEND MANAGEMENT'. The user is logged in as 'Welcome NCAS Requestor'. The main header shows 'Home | Help | Logout'. Below the header, there are navigation tabs: 'Create', 'Search', 'Manage', 'Recent', and 'Preferences'. The main content area is titled 'NC5000076 - NCAS Requestor Approvable' with a status of 'Ordered'. A message states: 'These are the details of the request you selected. Depending on its status, you can edit, change, copy, cancel, or submit the request for ...'. Below this is a 'Back' button and 'Receive', 'Close', and 'Print' buttons. There are tabs for 'Summary', 'Approval Flow', 'Receipts', and 'History'. The 'Summary' tab is active, showing order details: Order ID: NC5000076, Version: 1, Title: NCAS Requestor Approvable, Supplier: B.W.Wilson Paper Co., Contact: Smithfield, Encumbrance Status: Encumbered, Close Order: Open, Order Transmitted to Supplier? [checked]. In the 'My Labels' section, the 'Apply Label...' button is circled in red. Below this is a 'Line Items' table with one item: 'Paper, Bond, Recycled 100%, White, Boise ...' with a price of \$48.45 USD and a tax of \$0.00000 USD. A 'Detail' button is next to the item. At the bottom, there is a 'Contract ID: 645A' and 'Supplier: B.W.Wilson Paper Co.' information.

4. The 'Apply Label' options will appear. If you have not previously created any Labels, only 'Archive Items' and 'New Label' will appear as options.

5. To assign the item to the 'Archive Items' Label, click the 'Archive Items' option.

6. To create a new Label and assign the item to that Label, click 'New Label.'

This screenshot is similar to the previous one, showing the same order details. However, a dropdown menu is open over the 'Apply Label...' button. The menu options are: 'Add Label', 'Archive Items', 'New Label', and 'Remove Label'. The 'New Label' option is circled in red. The rest of the interface, including the order details and the 'Line Items' table, remains the same as in the previous screenshot.



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7. Once **'New Label'** is clicked, an **'Add Label'** pop-up window will appear.
8. Enter the Label name in the **'Enter New Label'** field.
9. Click **'OK.'**

The screenshot displays the NCE-Procurement ARIBA SPEND MANAGEMENT interface. The main header includes the logo and navigation links like Home, Help, and Logout. Below the header, there are tabs for Create, Search, Manage, Recent, and Preferences. The main content area shows a request summary for 'NC5000076 - NCAS Requestor Approvable' with a status of 'Ordered'. A pop-up window titled 'Add Label' is overlaid on the summary, containing a dropdown menu for 'Add new label to be associated with', a text input field for 'Enter New Label' (containing 'NCAS Requestor Label'), and 'OK' and 'Cancel' buttons. The background summary includes fields for Order ID, Version, Title, Supplier, Contact, Encumbrance Status, Close Order, and Order Transmitted to Supplier. Below the summary is a table of line items.

Type	No.	ReqID	Qty	Unit	Description	Price	Tax	Amount
1	RQ20000602	1	carton	Paper, Bond, Recycled 100%, White, Boise ...	054922	\$48.45 USD	\$0.00000 USD	\$48.45000 USD





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10. Once the new Label is named and you click 'OK,' you will be returned to the approvable.

11. The new Label will appear at the header level of the approvable.

**Note:** Multiple Labels can be added to the same approvable by following the same process described above.

**Note:** The same Label can be added to ANY approvable type. For example, an eRequisition and a purchase order can have the same Label.

**NC5000076 - NCAS Requestor Approvable** Status: Ordered

These are the details of the request you selected. Depending on its status, you can edit, change, copy, cancel, or submit the request for ...

Back Receive Close Print

**Summary** Approval Flow Receipts History

Order ID: [NC5000076](#)  
 Version: 1  
 Title: NCAS Requestor Approvable  
 Supplier: B.W.Wilson Paper Co.  
 Contact: Smithfield  
 Encumbrance Status: Encumbered  
 Close Order: Open  
 Order Transmitted to Supplier?   
 My Labels: [NCAS Requestor Label](#) [Apply Label...](#)

Type	No.	ReqID	Qty	Unit	Description	Supplier Part Number	Price	Tax	Amount
	1	<a href="#">RO20000602</a>	1	carton	Paper, Bond, Recycled 100%, White, Boise ...	054922	\$48.45 USD	\$0.00000 USD	\$48.45000 USD <a href="#">Detail</a>

Contract ID: 645A  
 Supplier: B.W.Wilson Paper Co.  
 Location: Smithfield  
 Commodity Code: 645-21 - Bond Paper (Includ...)

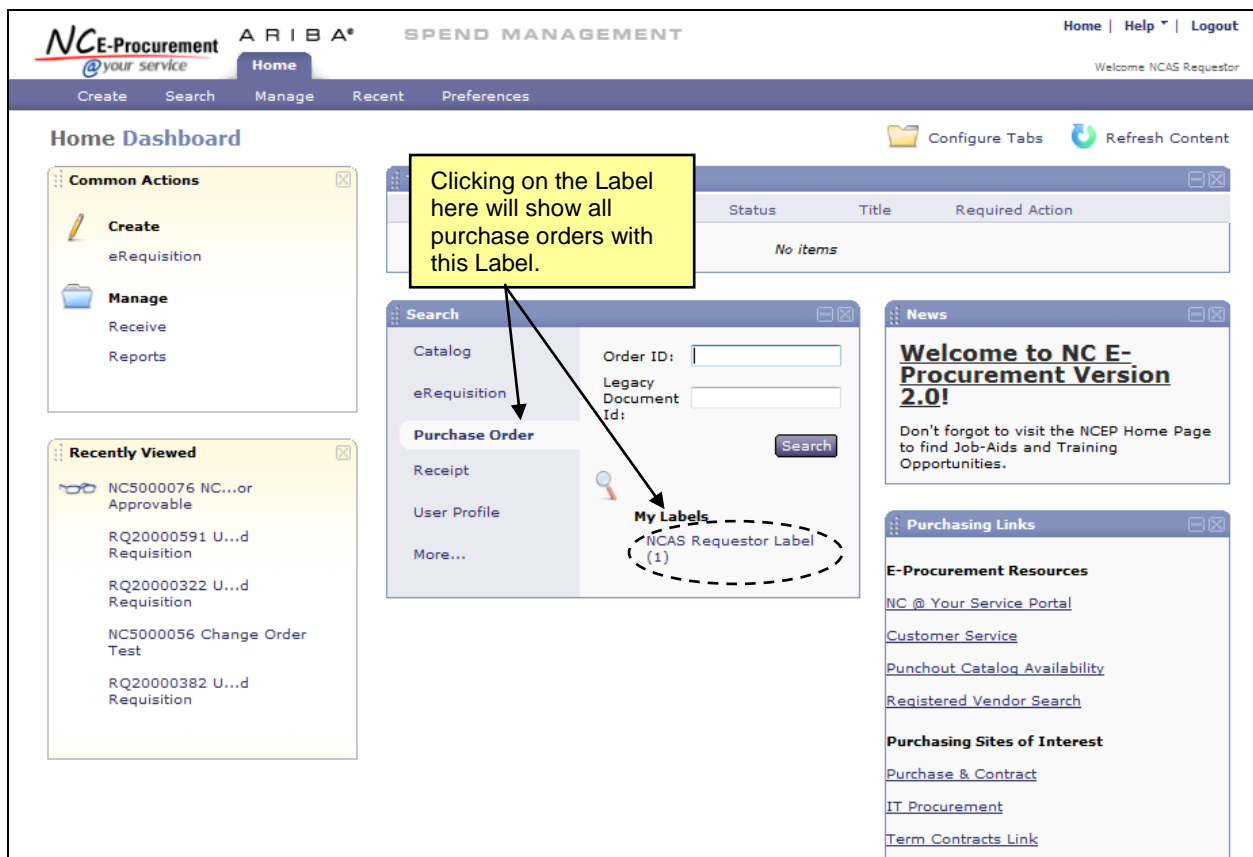
Paper, Bond, Recycled 100%, White, Boise Aspen 100, 8 1/2x11, 20#, 5000/Ctn, 92 Brightness, 100% Post Consumer Fiber, 100% Environmentally Responsible, Processed Chlorine Free, Laser Guaranteed, Ream Wrapped, FSC Certified

### III. Using Labels to Locate Approvables

Starting from the Ariba Dashboard, Labels that have been assigned to approvables can be used to locate all items with that Label assigned to them.

1. For a search for approvables to which a Label has been applied, the Label will appear in the 'Search' Portlet on the Ariba Dashboard.
2. Select the approvable type that you would like to locate by its Label.
3. If a Label is available, it will appear once that search is selected.
4. Click on the Label name to access items in that approvable type that have been assigned that specific Label.

**Note:** If you have assigned a Label to more than one approvable type (e.g., eRequisitions and Purchase Orders) you will have to go to both the 'eRequisition' and 'Purchase Order' searches and click on the respective Label name in order to view the items. If you are on the 'Purchase Order' search and click on the desired Label, any eRequisitions that have also been assigned this Label will **NOT** appear.



The screenshot shows the Ariba dashboard interface. At the top, there is a navigation bar with 'Home', 'Help', and 'Logout' options. Below this is a 'Home Dashboard' section with various portlets. A yellow callout box with the text 'Clicking on the Label here will show all purchase orders with this Label.' points to the 'My Labels' section in the 'Purchase Order' search portlet. The 'My Labels' section shows a label named 'NCAS Requestor Label (1)'. The 'Purchase Order' search portlet also includes search criteria for 'Order ID', 'Legacy Document', and 'Id', along with a 'Search' button. Other portlets visible include 'Common Actions', 'Recently Viewed', 'News', and 'Purchasing Links'.

## IV. Deleting a Label from an Approvable

Labels can be removed from an approvable at any time by accessing the approvable via the **'Search'** or by clicking on the Title of the approvable. For more information regarding the System Search functionality, please refer to the **'System Searches'** process guide.

1. From the **'Search'** page, pull up the approvable from which you would like to remove the assigned Label.
2. Check the box next to the approvable and click **'Label.'**
3. Labels that are available to be removed are displayed under the **'Remove Label'** header.
4. Click the name of the Label that you want to remove from the approvable.

**Note:** To remove multiple Labels from the same approvable, repeat the same process for each Label.

**Note:** If you remove a Label from the only item that it was assigned to, it will also delete the Label itself. You will have to recreate the Label in order to assign it to future approvables.

**Note:** Any time you see the **'Label'** drop-down menu you will be able to perform the Add, Delete, and Assign Label functions. This includes, but is not limited to, System Searches, initial approvable creation, and approving items.

The screenshot shows the NCE-Procurement search interface. The search type is set to 'Purchase Order'. The search filters include Order Title, Order ID, Date Ordered, Entity, eRequisition ID, Legacy Document ID, Receipt Date, Receipt ID, Receipt Status, Requester, Status, and Supplier. The search results show one item: a purchase order with Legacy Document ID NCS000076, ordered today at 12:34 PM, from B.W. Wilson Paper Co. for a total of \$48,450.00 USD. A 'Label' dropdown menu is open over the search result, showing options: 'Apply Label', 'Archive Items', 'New Label...', 'Remove Label', and 'NCAS Requestor Label'. A callout box points to the 'Remove Label' option, stating: 'Selecting this Label will remove the Label from the approvable.'