Getting Started

Introduction

NC eProcurement Sourcing is a tool that allows users to manage solicitations at both the state and agency level. There are several benefits to the Sourcing tool such as document storage, electronic approval flows, and the ability to run reports. NC eProcurement Sourcing acts as a centralized tool for vendors and entities to communicate during a public solicitation for goods or services. Depending on assigned permissions, some users may see different options.



Learning **Objectives**

At the end of this job aid, **you will be able to**:

- Log into the NC eProcurement Sourcing realm.
- Navigate to the Sourcing Tab.
- Utilize the Portlets on the Sourcing Tab.

Getting Started

Logging In

To access NC eProcurement Sourcing, users will click the **NCEP Sourcing & Contracts Login** link from the NC eProcurement website, which will direct them to enter an email and password.

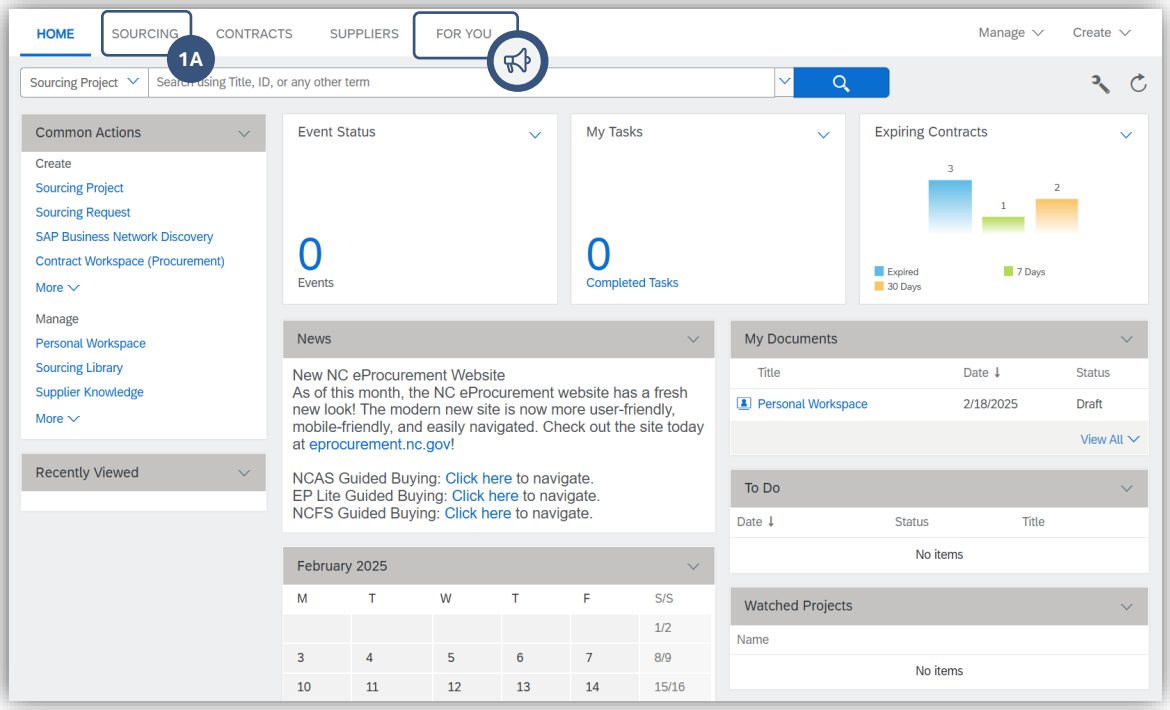


Home Tab

1 After logging in, users will be brought to the **Home** tab.

A. Click on **Sourcing** to navigate to the **Sourcing** tab.

The **For You** tab is a Guided Sourcing tab that features a live collated feed of event status updates.



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Sourcing Tab

1

The **Sourcing** tab is divided into three sections. The horizontal area at the top of the screen is called the **Masthead**. Below the **Masthead** is a **Search Bar** that allows the user to search for different types of content, including Sourcing Projects and Events. The main area is referred to as the **Dashboard**. The Dashboard contains **Content Portlets** that can be customized through the **Configure** menu.

Masthead: On the right side of the **Masthead**, users will find icons for **Search, Print, Notifications, Messages,** and a drop-down menu for SAP Ariba's **Help Center**. **User Preferences** can be managed by clicking the circle containing the user's initials. Beneath **User Preferences**, there are drop-downs for **Recent**, **Manage**, and **Create**.

A. Search: Click the magnifying glass icon for a list of the different search types.

B. Print: Click the printer icon to print the current screen.

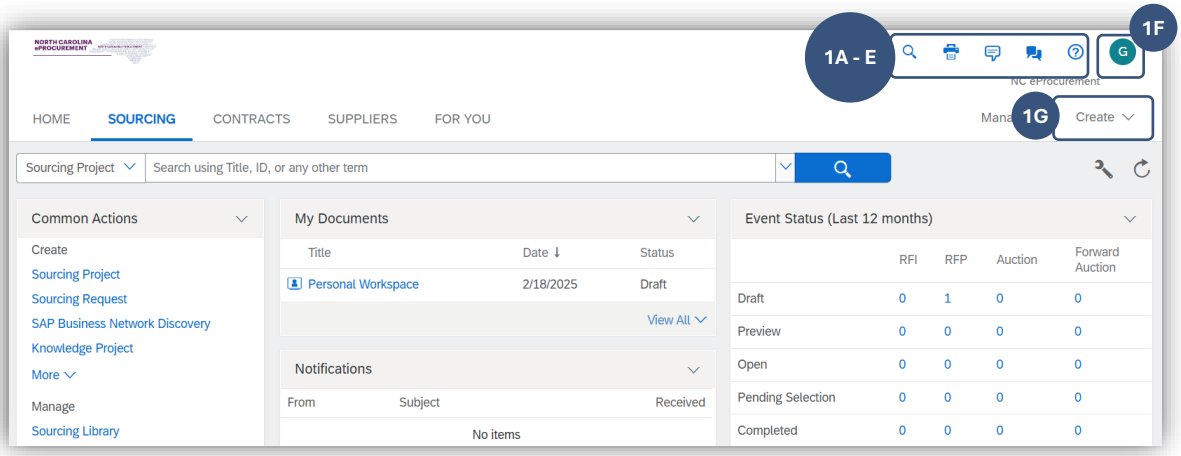
C. Notifications: Click the text bubble icon to see all **Notifications** in one place.

D. Messages: Click the chat icon to see any messages from the Guided Sourcing Direct Message feature.

E. Help Center: Click the question mark icon to access SAP Ariba's help options. Selecting **Help Center** will open a new window where the user can search for and view a variety of user guides.

F. User Preferences: Click the user initials in the top-right to access a drop-down with options, including **Logout**, **Change notification preferences**, and the **Dashboard's** visual **Theme.**

G. Create: Click the **Create** link for a list of options of items to initiate, including **Sourcing Project.**



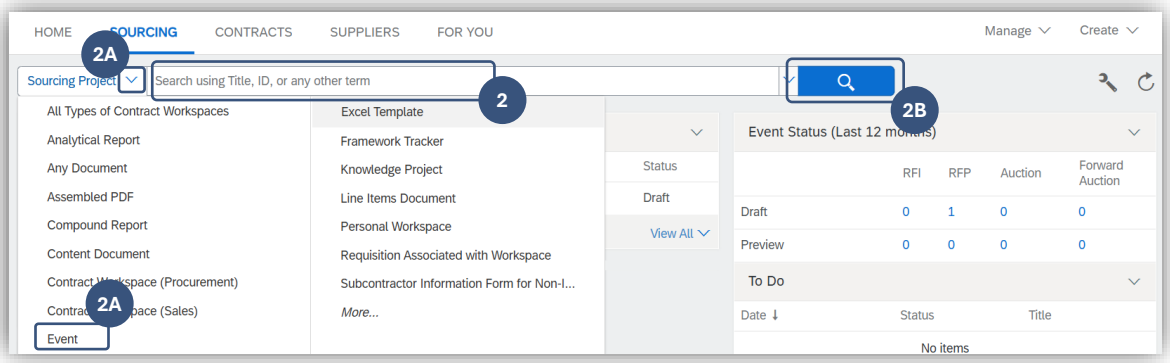
It may be helpful for users who manage **Dashboards** for different modules, (e.g., Sourcing and Contracts), to use different visual **Themes** for each tab to make it easier to tell them apart.

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2 **Search Bar**: Use the Search Bar to find various items.

A. Click the drop-down box on the left to search for different types of content, including Sourcing Projects or Events.

B. Click the Magnifying Glass icon to initiate the search.



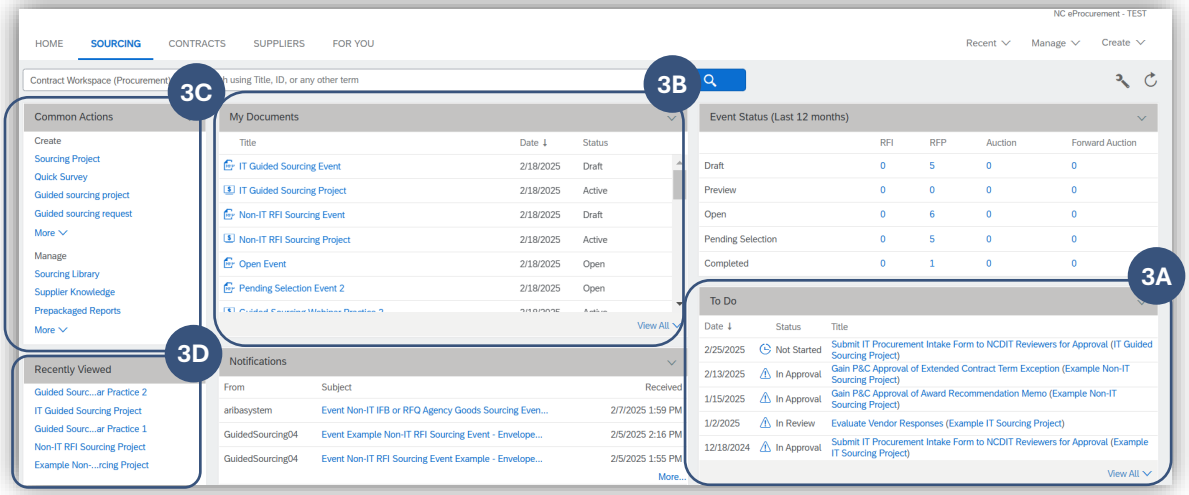
3 **Dashboard:** The Dashboard is made up of various **Content Portlets,** which include the default **To Do** and **My Documents** portlets. The **Common Actions** and **Recently Viewed** portlets feature helpful shortcuts, and other portlets including a **Calendar** that can be added through the **Configure** menu. All portlets can be rearranged around the screen to the user's desired location.

A. To Do: The **To Do** portlet lists items that require actions by the user. Clicking **View All** will display all items, not just those recently displayed in the portlet. Once **Tasks** in the **To Do** portlet are completed, they will disappear.

B. My Documents: The **My Documents** portlet displays the most recent documents created by the user, as well as the current **Status** of those documents. Click on the document **Title** to open that file.

C. Common Actions: The **Common Actions** portlet contains options to **Create** or **Manage** items – the same items that are available by clicking links on the **Masthead**. Clicking **Sourcing Project** under the **Create** column is the easiest way to initiate a **Sourcing Project** and clicking on a reporting option in the **Manage** drop-down is an easy way to access available reports.

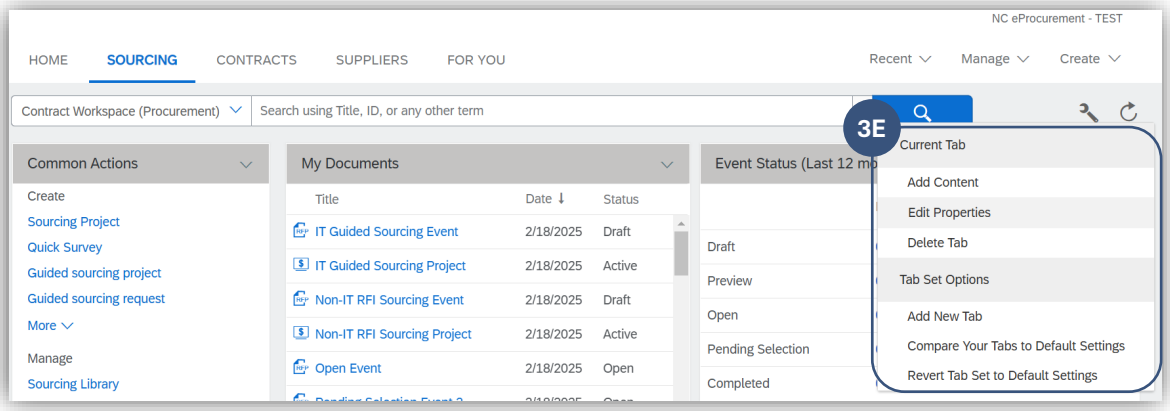
D. Recently Viewed: The **Recently Viewed** portlet displays the five most-recent documents accessed by the user.



STATE DEPARTMENT STATE BRANCH
LOCAL GOVERNMENT CITY COUNTY
COMMUNITY COLLEGE PUBLIC SCHOOLS
NORTH CAROLINA ePROCUREMENT PURCHASI
ONLINE SHOPPING STATEWIDE TERM CONTRACTS
ELECTRONIC VENDOR PORTAL HUB CERTIFIED
QUOTE PUNCHOUT CATALOG
PURCHASE ORDER
SOURCING
BIDDING
BUY

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E. Configure Menu: The Dashboard can be further personalized by clicking on the wrench icon to display the **Configure Menu.** A list of options will appear, including those to **Add Content** or **Edit Properties** on the current tab or to add a completely new tab.



The user can always reset the **Dashboard** to the administrator-created default dashboard by clicking the **Revert Tab Set to Default Settings** link.