

NC eProcurement

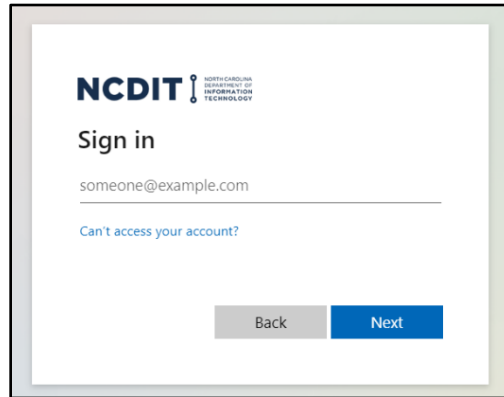
Getting Started



NC eProcurement Contracts is a tool that allows users to manage contracts at both the State and Agency level. There are several benefits including expiration reminders, document storage, electronic approval flows, and the ability to run reports. Depending on assigned permissions, some users may see different options.

I. Logging In

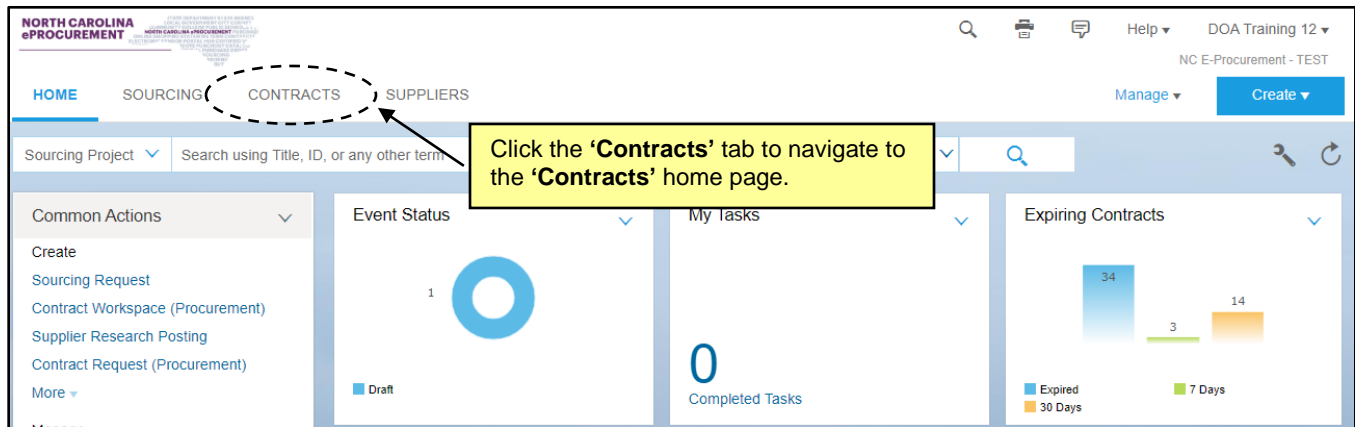
To access NC eProcurement Contracts, users will click the link from the NC eProcurement website, which will direct them to enter an email and password.



II. Home Tab

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

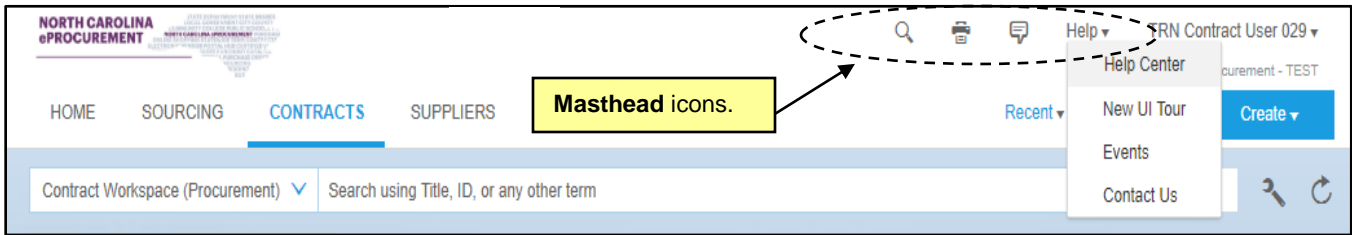
1. Click 'Contracts' to navigate to the 'Contracts' tab.



III. Contracts Tab

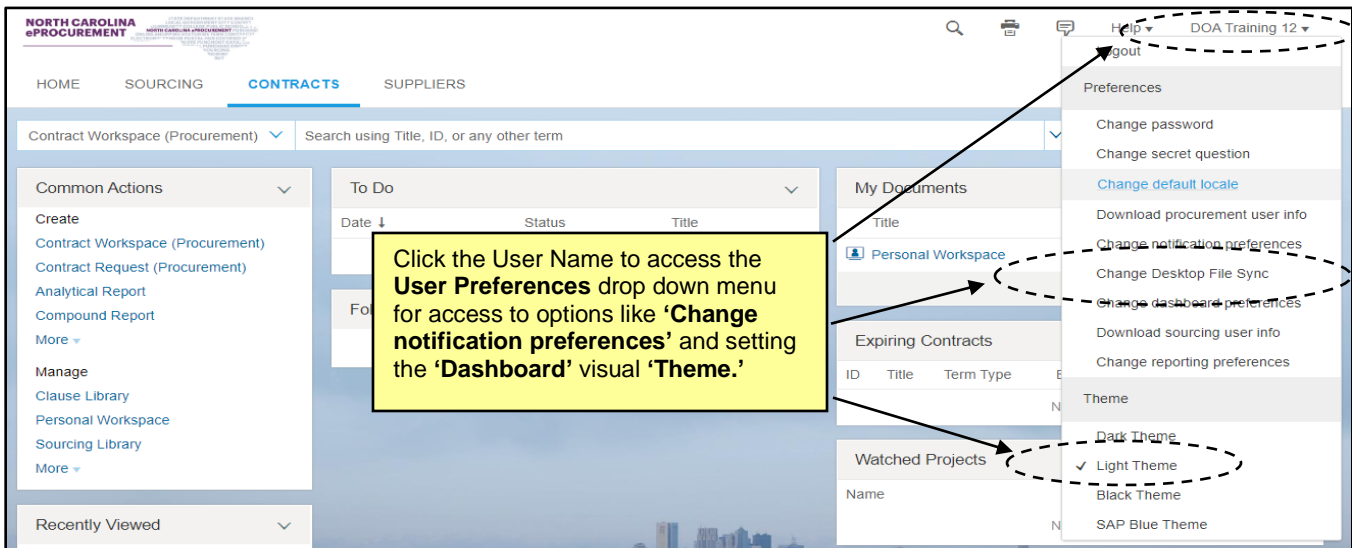
The 'Contracts' Tab is divided into three sections. The horizontal area at the top of the screen is called the **Masthead**. Below the **Masthead** is a **Search Bar** that allows the user to search for different types of content including Projects, Forms, and Reports. The main area is referred to as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

1. **Masthead:** On the right side of the **Masthead**, users will find icons for **Search, Print, Notifications,** and a drop-down menu for SAP Ariba's '**Help Center.**' **User Preferences** can be managed by clicking the drop-down arrow next to the user's name. 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. **Help:** Click the drop-down next to '**Help**' 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.

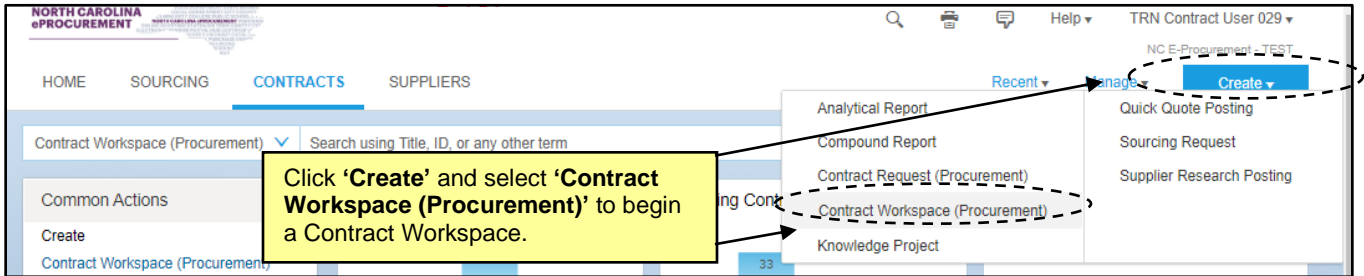


- e. **User Preferences:** Click the User Name in the top-right to access a drop-down with options including '**Logout,**' '**Change notification preferences,**' and the **Dashboard's** visual '**Theme.**'

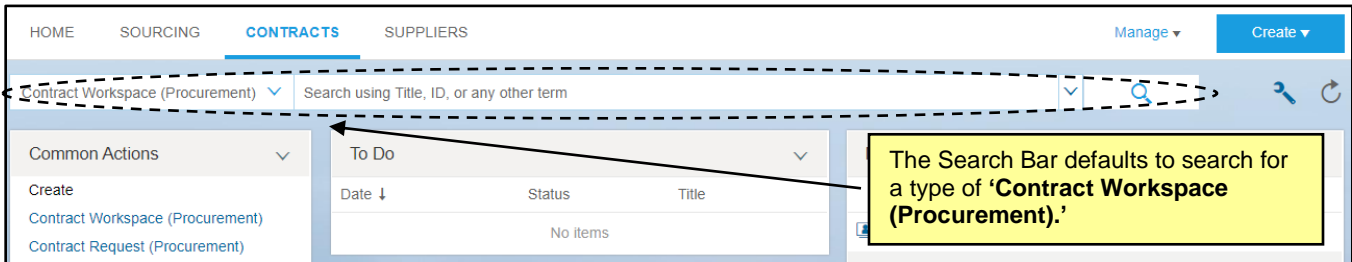
Note: It may be helpful for users who manage '**Dashboards**' for different modules, i.e., Contracts and Buying, to use different visual '**Themes**' for each tab to make it easier to tell them apart.



- f. **Create:** Click the **'Create'** link for options of items to initiate including **'Contract Workspace (Procurement).'**



2. **Search Bar:** Use the **Search Bar** to find items of various types. **'Contract Workspace (Procurement)'** is the default item type, but others can be selected instead.

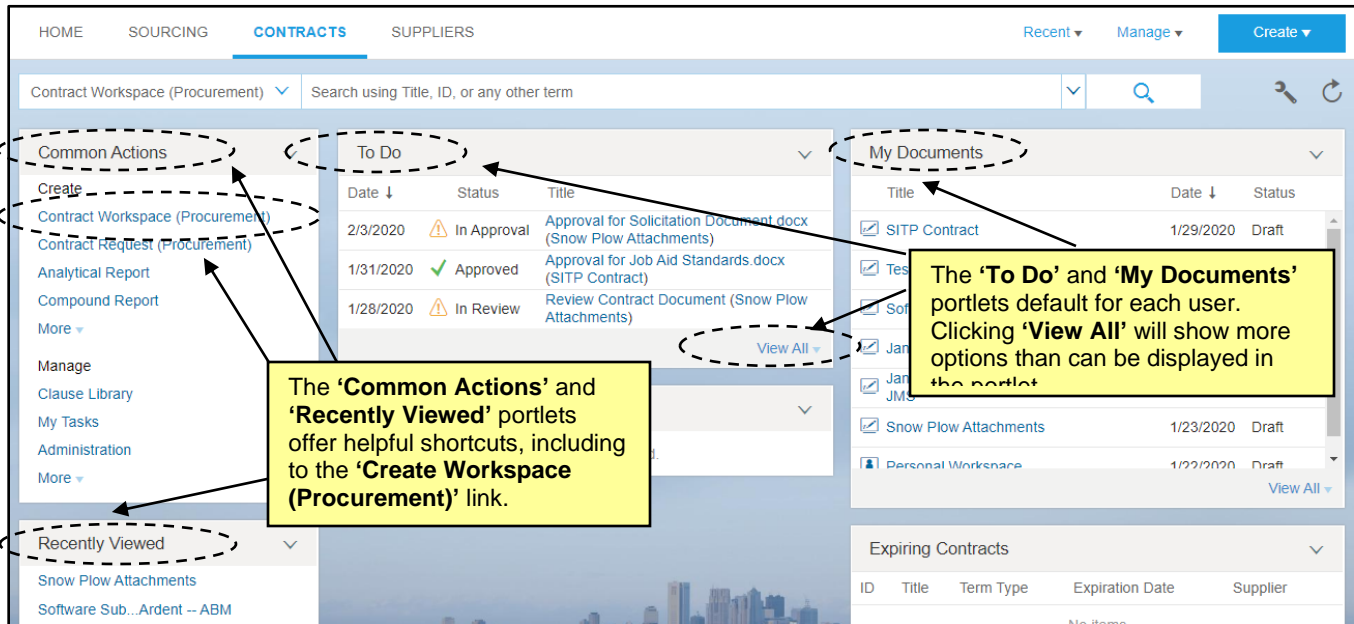


3. **Dashboard:** The **Dashboard** is made up of various **'Content Portlets,'** which include the defaulted **'To Do'** and **'My Documents'** portlets. The **'Common Actions'** and **'Recently Viewed'** portlets feature helpful shortcuts, and other portlets such as a **'Calendar'** can be added through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

- To Do:** The **'To Do'** portlet lists items that require actions by the user. Clicking **'View All'** will display all items, not just the few most recent that display in the portlet. Once **'Tasks'** in the **'To Do'** portlet are completed, they will disappear from the portlet.
- 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 document.
- Common Actions:** The **'Common Actions'** portlet contains options for items to **'Create'** or **'Manage'** – the same items that are available by clicking those links on the **Masthead**. Clicking **'Contract Workspace (Procurement)'** beneath **'Create'** is the easiest way to initiate a Contract Workspace and clicking on **'Prepackaged Reports'** in the **'Manage'** dropdown is an easy way to access available reports.
- Recently Viewed:** The **'Recently Viewed'** portlet displays the five most-recent documents accessed by the user.

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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 then appear, including those to 'Add Content' or 'Edit Properties' on the current tab, or to add a completely new tab. If they are not added to the **Dashboard** by default, the user can add 'Action Tiles' from this drop-down.

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

