NC eProcurement

Getting Started

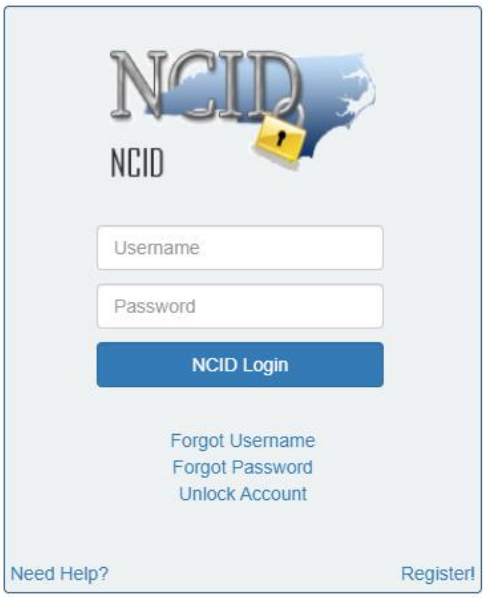
NC eProcurement is a user-friendly, online purchasing system that offers cost savings and an efficient purchasing process to government users. It can be accessed by users in North Carolina Agencies, Community Colleges, School Systems, and local governments. NC eProcurement utilizes the cloud platform of SAP Ariba Procurement software for purchasing functions.

NC eProcurement is designed to enable users to complete a variety of procurement functions based on business and job needs. It provides users with a more efficient approval process, more purchasing options, and easier access to catalogs, contracts, and reports. NC eProcurement is accessible through two layouts – **Guided Buying** and **Expert View**. Both access the same system, but there are differences in appearance as well as minor variances in function.

I. Logging In

To access NC eProcurement, users will click the link from the NC eProcurement website and then be asked to enter NCID credentials.

Note: NCID User IDs and passwords are case-sensitive.



II. Guided Buying Tour

After logging in, users will be brought to the 'Guided Buying' landing page. Guided Buying is one of two layouts available to access NC eProcurement. It has a familiar on-line shopping appearance designed to make routine purchases easier for basic users, especially from Statewide Term Contract catalogs.

There are three icons at the top right of the screen:

1. **Bell:** This is where notifications, such as the need to approve or receive a requisition will appear.

2. **Shopping Cart:** Items that have been added to the requisition are represented here.

3. **Initial:** This icon brings up a menu of options where users can change their profile information, delegate authority, and change their email notification preferences. It is also where users should go to logout.

The **'Catalog Search'** bar appears in the upper, middle section of the page where users can search directly for catalog items. Just below, there are four tabs:

4. **Shop:** This tab has categories of items represented by square pictures called **'Tiles'** that organize products that are on Statewide Term Contract catalog so they can be added to the shopping cart. It is the default tab for many users.

5. **Your Favorites:** Users can mark certain catalog items that they purchase frequently as "favorites" and then find them to easily purchase on this consolidated page.

6. **Your Requests:** Users can see their requisitions and view the status.
(**NCAS Only:** From here users can also view purchase orders that are pending desktop receipt and take action to receive on those items.)

7. **Your Approvals:** Requisitions pending approval will appear in this tab. Some users may default to this tab if they do not have the ability to create a purchasing requisition.

On the right-hand side of the page is the **'Right Rail'** with more options:

8. **Request Ad-Hoc Item:** Requesters who want to purchase something that is not available on a Statewide Term Contract catalog, also called a **'Non-Catalog'** item, can click to enter the item information manually.

9. **On Behalf Of:** To create a purchase requisition on behalf of another user, click **'On Behalf Of'** and select the user by email address, name, or ID in the window that appears.

   Note: A blue line will appear to indicate that the user is acting on behalf of someone else.

10. **Recent Requests:** Purchase requisitions that were recently created appear in this section. Clicking **'See All'** will take the user to the **'Your Requests'** tab.

The center of the page is made up of **'Tiles'**:

11. **Tiles:** Tiles are set up based on the most commonly purchased items that are on Statewide Term Contract. They are organized in hierarchies to make it easier to find the items a user is trying to find.

12. **Sub-tiles:** Clicking a '**Tile'** will bring you to the **'Sub-tiles'** that are associated with the **'Tile'** selected. **'Sub-tiles'** may lead users to punchout catalogs or standard catalog items.

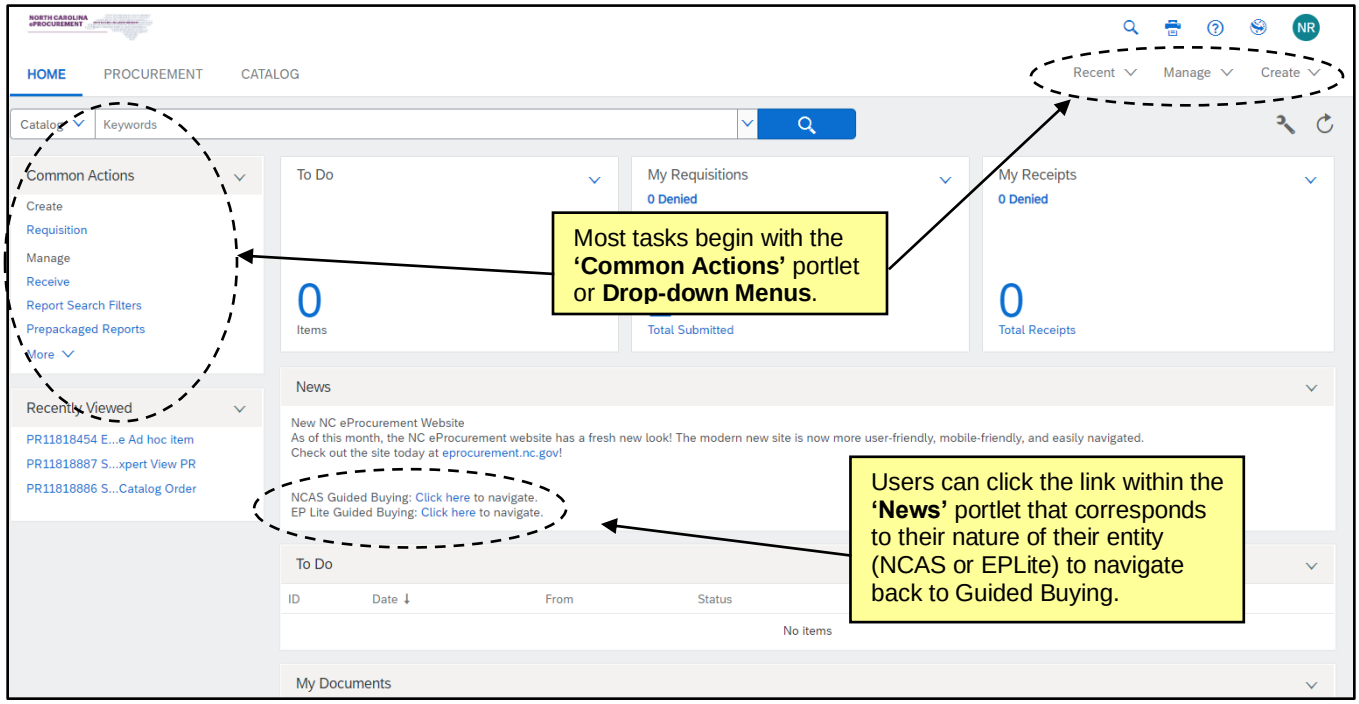
    Note: Clicking **'NC eProcurement'** in the top left corner will reset the search and return the user to the Guided Buying landing page.

III. Expert View Tour

Expert View is geared towards all actions of the purchasing cycle instead of focusing on the creation of Purchase Requisitions (PR) as is the case in Guided Buying. All users have access to this view because some information can only be updated in Expert View. A PR that is created in Guided Buying can be viewed in Expert View and vice versa. It is a different layout of the same NC eProcurement system.

1. To access Expert View, scroll through the **'Tiles'** in Guided Buying and find the **'Expert View'** Tile.

2. Users will be brought to the Expert View **'Home'** tab.



There are five **Icons** in the upper right-hand corner:

1. **Search:** Clicking the search icon will open a menu with options for document types to search.
2. **Print:** Offers a printer-friendly view of the information on the Expert View 'Home' tab.
3. **Help:** Takes users to the SAP Ariba Help Center.
4. **Site:** Displays the site name.
5. **Initials:** This icon brings up a menu of options where users can delegate authority to another team member, change the user profile, modify email notification preferences, reset default preferences pertaining to visual screen displays, or logout.

The **Drop-down Menus** just below the icons allow users to access different types of information:

1. **Recent:** Access the most recently viewed or worked-on documents.
2. **Manage:** Manage documents or business processes.
3. **Create:** Create documents will display only document types the user is authorized to create.
4. **Search:** Search for documents. Displays only document types the user is authorized to view or process.
5. **Recent:** Access the most recently viewed or worked-on documents.
6. **Preferences:** Delegate authority to another team member, change the user profile, modify email notification preferences, and reset default preferences pertaining to visual screen displays.

The Expert View **'Home'** tab also contains a number of content items. The content items are customizable depending on a user's preferences, but the following list includes some of the more important features:

1. **Common Actions:** The **'Common Actions'** Portlet displays links to common actions to create and manage documents and provides another option to access the same functions as the **'Create'** or **'Manage' Drop-down Menus**.

2. **Search Bar:** Search for documents using the drop-down to select the type of document and the keyword to specify. If additional filters or information is necessary, select the document type and click the blue **'Search'** button to access the advanced search page.

   Note: If the **'Search'** button is clicked without selecting a document type, the default is 'Catalog' and the user will be sent to the Expert View **'Catalog'** tab.

3. **Action Tiles:** The default Action Tiles are My Requisitions, My Receipts, and To Do and offer the user a quick update on their activity in NC eProcurement.

   Note: These can be customized by clicking the down arrow and selecting the appropriate option.

4. **To Do:** The **'To Do'** Portlet lists the documents that require action. Click the document icon or the document title to open the documents and act on them. The **'View All…'** link in the lower right corner provides access to all documents by Document Type or Required Action. Click any column header to sort the list by that column's contents (for example, sort by **'Status'**). An arrow in the column header indicates the column by which you are sorting, and whether the sort is ascending or descending.

5. **My Documents:** The **'My Documents'** Portlet displays the most recent documents created. Click the document icon or the document title to open the document and review and complete the document, if required. The **'View All…'** link in the lower right corner provides access to all documents by Document Type. Click any column header to sort the list by that column's contents (for example, sort by **'Status'**). An arrow in the column header indicates the column by which you are sorting, and whether the sort is ascending or descending.

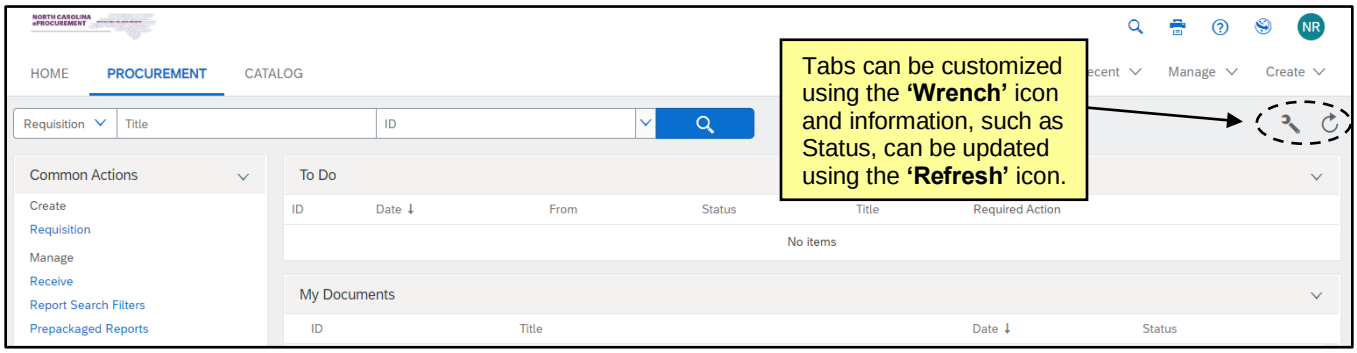
6. **Recently Viewed:** The **'Recently Viewed'** Portlet displays the five most recent documents accessed either to review or to work on.

7. **News:** Contains updates sent out by NC eProcurement. It also contains the link to get back to Guided Buying.

The Expert View **'Procurement'** tab contains the portlets most relevant to procurement. It does not have the **'Action Tiles'** or **'News'** portlet by default but those can be added. If a user logs out of NC eProcurement from the **'Procurement'** tab they will automatically be taken to this tab the next time Expert View is accessed.

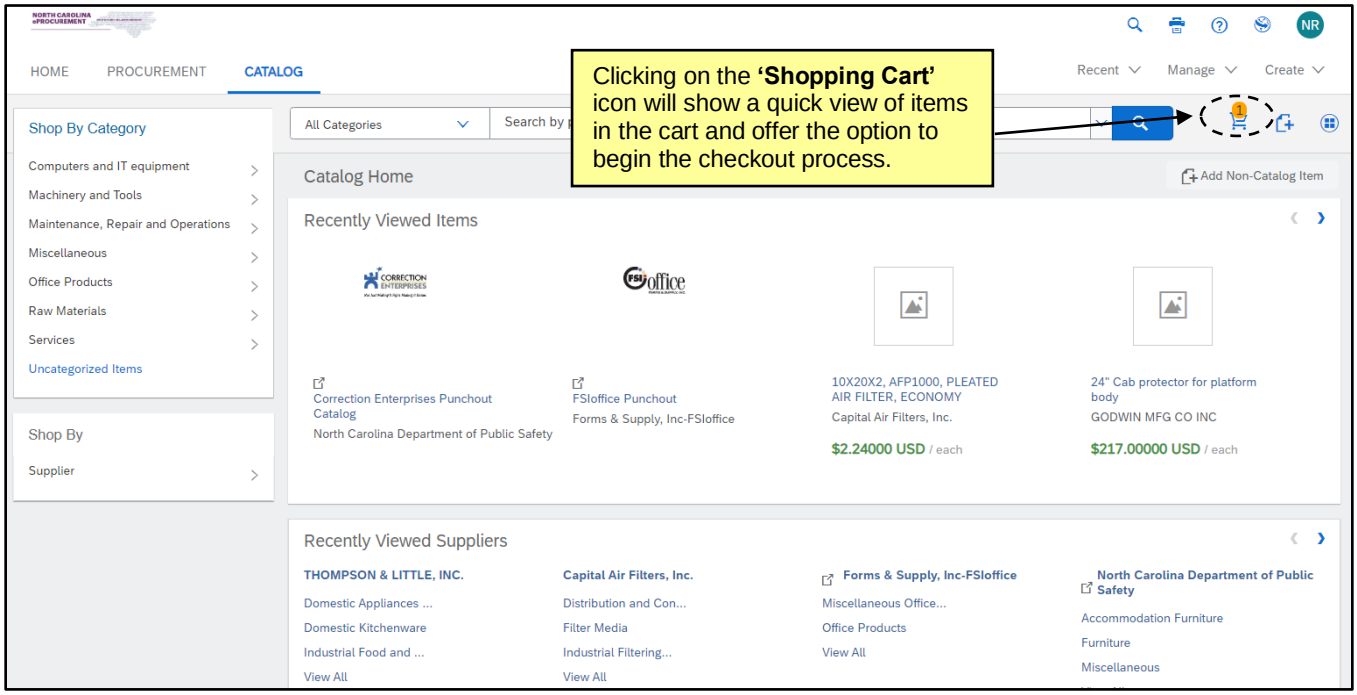
Notes:

- All content on the tabs can be moved or changed using the down arrows next to the portlet name to remove items and the **'Wrench'** icon to add or configure content.
- The **'Refresh'** icon next to the **'Wrench'** icon will force an update of all information in the portlets.



The Expert View **'Catalog'** tab provides the quickest way to search Statewide Term Contract items in Expert View. Users can search using keyword, Contract ID, or supplier. The panel on the left-hand side can help refine results.

Note: Items can be added to the shopping cart, which automatically begins a purchase requisition for users that have the appropriate permission. The checkout process for the requisition can be started by clicking **'Checkout'** after clicking the **'Shopping Cart'** icon.



IV. Status of Requisitions and Purchase Orders

NC eProcurement Purchasing Lifecycle for **NCAS Agencies**:

Purchase Requisition:

1. In the beginning of the NC eProcurement purchasing lifecycle, items are added to the Cart in Guided Buying or a purchase requisition (PR) is created in Expert View, the PR has a status of **'Composing.'**

2. Once the information for the PR has been entered, it is **'Submitted'** for approval and pre-encumbrance.

3. A designated approver(s) reviews the PR. If approval is granted, the PR is sent to NCAS to encumber funds. A purchase order is then generated in NC eProcurement and the status is updated to **'Ordered.'**

   Note: If the PR is denied or fails pre-encumbrance in NCAS, the status of the PR is set to **'Denied.'**

Purchase Order:

4. The Purchase Order (PO) is electronically transmitted to the supplier(s) via email or the Ariba Network.

5. If the purchase order needs to be edited after it has been updated to **'Ordered'** status, users may create a change order by clicking the **'Change'** button in the purchase order summary.

6. Once the items have been physically received, the purchase order is ready to be received by the user in NC eProcurement. This begins the **Receiving** phase of the NC eProcurement purchasing lifecycle. Once all line items in the order have been verified and accepted, the order completes the NC eProcurement purchasing lifecycle with a status of **'Received.'**

   Note: A PO can be cancelled by clicking the **'Cancel'** button before anything has been received.

The Purchasing Lifecycle for **Community Colleges** and **School Systems** that requisition in NC eProcurement:

Purchase Requisition:

1. In the beginning of the NC eProcurement purchasing lifecycle, items are added to the Cart in Guided Buying or a purchase requisition (PR) is created in Expert View, the PR has a status of **'Composing.'**

2. Once the information for the PR has been entered, it is **'Submitted'** for approval.

3. A designated approver(s) reviews the PR. If approval is granted, the PR status changes to **'Approved'** and the PR is sent to the backend financial system for funds checking and further processing.

   Note: If the PR is denied rather than approved, the status of the PR changes to **'Denied.'**

Purchase Order:

4. The purchase requisition/purchase order must be processed in Colleague, LINQ, or SunPac depending on the specific backend system used by the EPLite entity.

5. Once complete, the purchase order is automatically transmitted back into NC eProcurement and is linked to the original purchase requisition. The purchase order now has a status of **'Ordered'** and is electronically transmitted to the supplier.

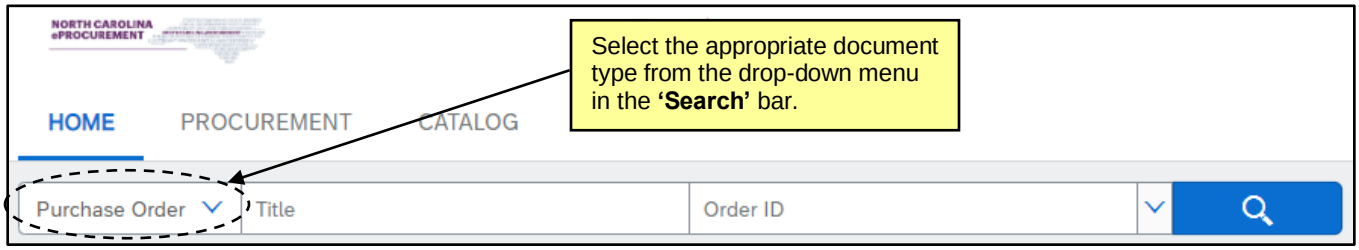
   Note: Any changes or cancellations must be done in the financial system.

V. Searching

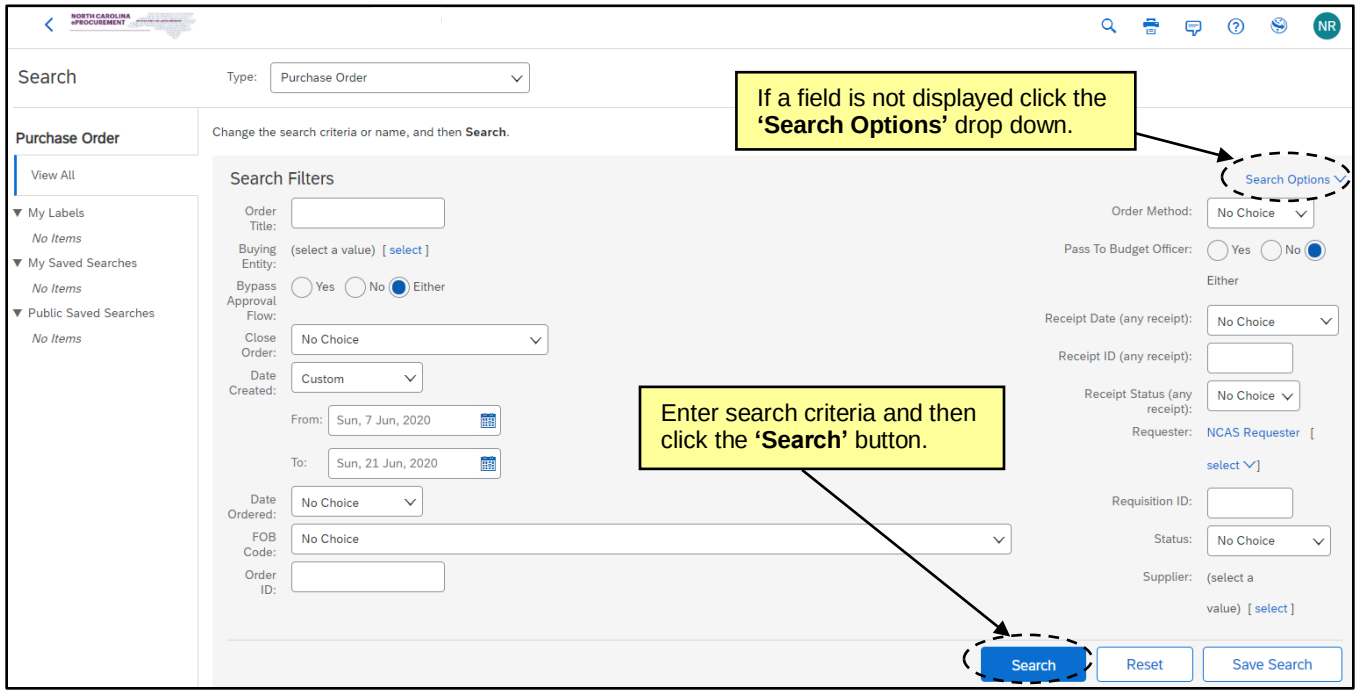
The system search functionality gives users the ability to search NC eProcurement to locate and view purchase requisitions, purchase orders, receipt information (NCAS only), user profile changes, and catalog items. The system search functionality is a quick and easy way to locate needed information. System searching offers a range of search criteria so users can conduct a search with minimal information. For example, users can search by requester, commodity code, creation date, and/or supplier name. Searching is best done in Expert View.

For similar or frequent searches, use the Saved System Search functionality. This allows users to directly access a previous system search quickly without entering specific search criteria again.

1. Select the type of search you would like to conduct using the drop-down menu in the **'Search'** Bar and click the blue magnifying glass/ **'Search'** button .



2. Enter the necessary search criteria in the appropriate fields to conduct a system search.



3. Add or remove search filters, as necessary, by clicking the **'Search Options'** link.

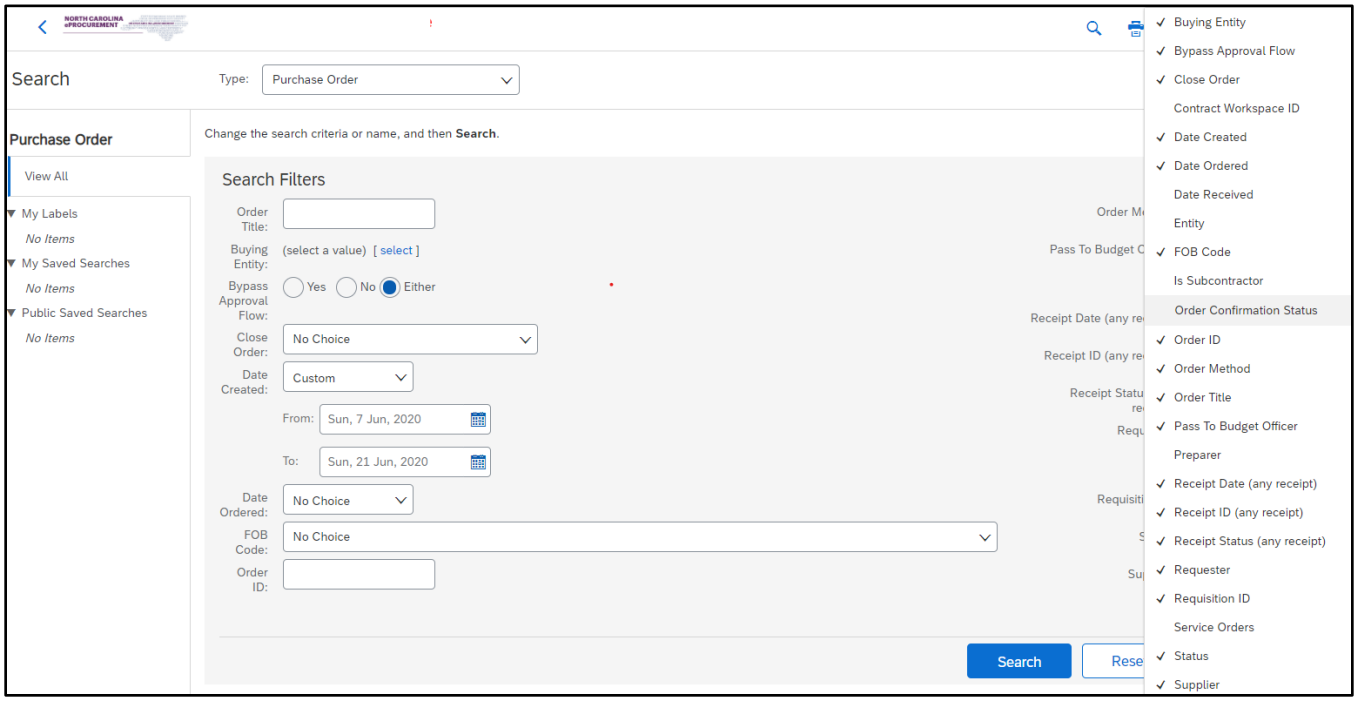
   Notes:
   - Users with the appropriate permissions can change the **'Type'** listed at the top of the **'Search'** page. Commonly searched Types include: Requisition, Purchase Order, Receipt, and User Profile. Select the appropriate category to return the desired transaction type.

   - The **'Requester'** field will automatically default to the user currently logged into NC eProcurement unless the User has the Global Reporting Role. For Users with the Global Reporting Role, this field will default to **'(select a value).'** Users can update this field, but if the User does not have the Global Reporting Role, the search results will not contain anything for other Users.

   - The **'Entity'** field will automatically default to the entity associated with the current user. This value can only be changed for users with cross-entity reporting permissions. All other users can only search for transactions associated with themselves or their entity.

   - Once **'Search Options'** has been clicked, users can add or remove search filters by selecting the desired search filter from the **'Search Options'** pop-up window.

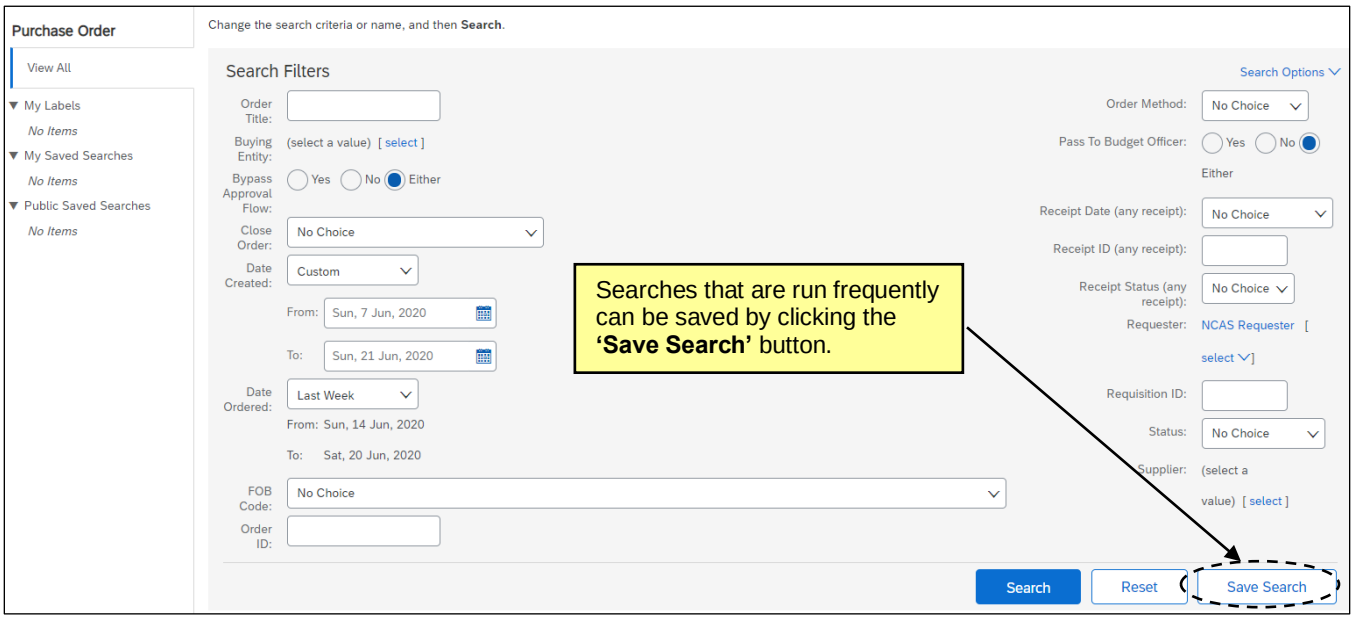
   - Only the fields selected from the **'Search Options'** pop-up window appear on the **'Search Filters'** page.



4. After entering the appropriate information in the search fields, click the **'Search'** button to complete the system search.

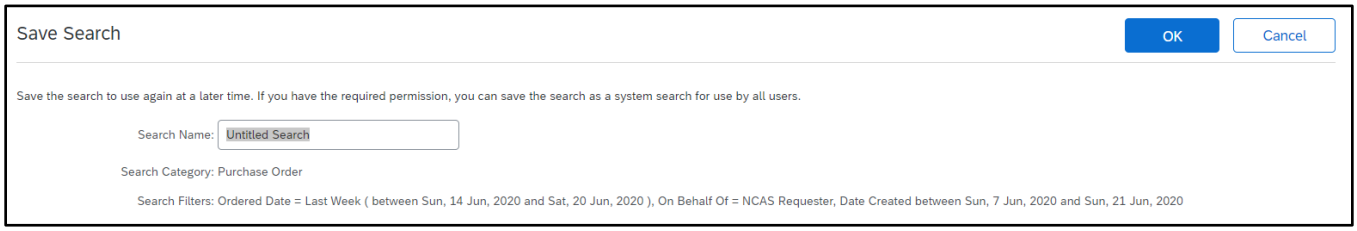
   Note: Running searches that are too broad (such as starting a purchase requisition search without setting any filters, which would attempt to return all purchase requisitions in NC eProcurement) can be slow and return too much data, making it difficult to find the actual data needed. Utilizing the concept of smart searching can help lessen the amount of time it takes to perform a search. It is usually best to start with a narrow search, using as many filters as may apply, and broaden the search as needed.

5. To save this search for future use, click the **'Save Search'** button.



6. Enter a search name in the **'Search Name'** field.

7. Click **'OK'.**



8. Saved searches will appear on the Shortcut Menu for the specific **Type** of search that was saved (e.g., Requisition or Purchase Order).

Notes:

- To delete a saved search, click the top **'Delete'** button while viewing the saved search. To edit a saved search, click the **'Refine'** button.

- A saved search may also be added as a Portlet on an Expert View tab by clicking **'Configure Tabs'** and select **'Add Content'** on a tab.

VI. Personal Profile

A personal profile or user profile is a set of information that contains a specific user's information, preferences, and settings. When a user logs in, the system recognizes the user and displays information, according to the preferences as set in the user profile.

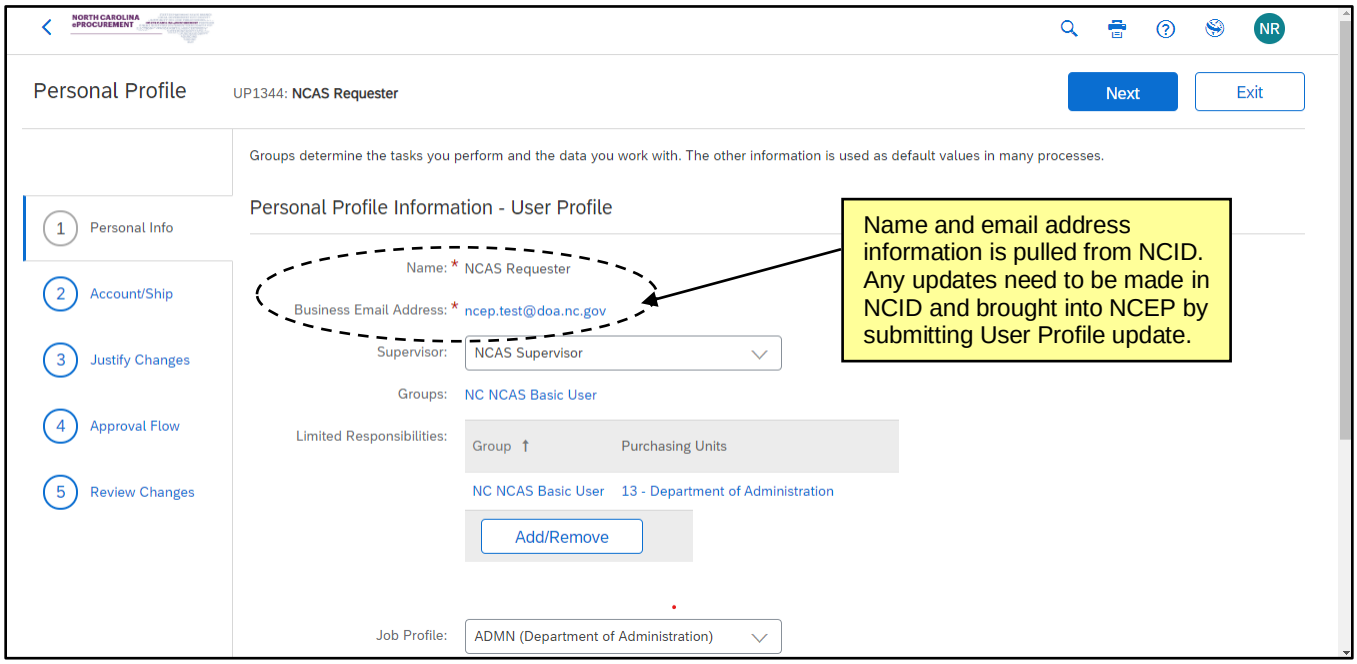
1. Click the **'Initials'** icon in either Guided Buying or Expert View and select **'Change your profile.'**

2. Changes to a **'Bill To'** and **'Supervisor'** can be made on the **'Personal Info'** page.

   Notes:
   - The name and email address fields cannot be edited on this page. To update these fields, contact your NCID DA and request that the information be changed in NCID. Once the changes have been made in NCID, the information will update automatically when you click **'Change Your Profile.'** You will need to submit the User Profile change in NC E-Procurement in order for the update to take place.

   - When a supervisor change is made through the personal profile, the user's existing supervisor as well as the new supervisor must approve the request before the change is made in the system. If the supervisor listed has left the agency, please contact the agency Security Administrator to make this update. The Security Administrator can make this change without approvals being required.

   - Groups, Roles and Permissions can only be updated by a Security Administrator or EPLite Administrator via a User Maintenance eForm.

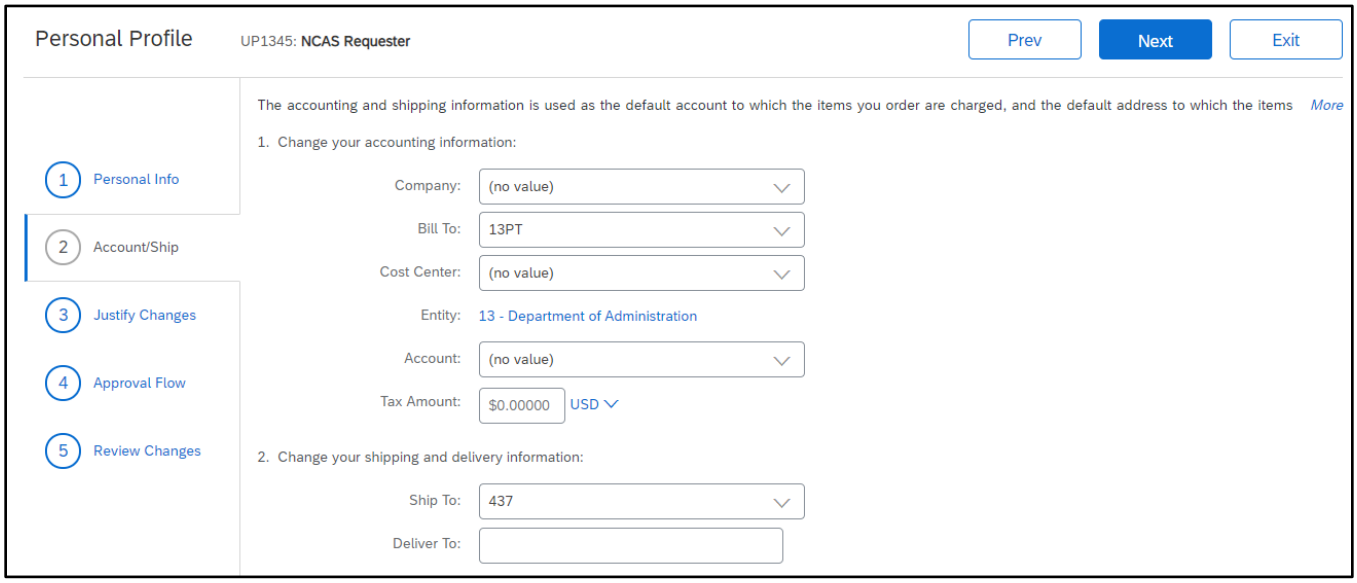


3. Click **'Next.'**

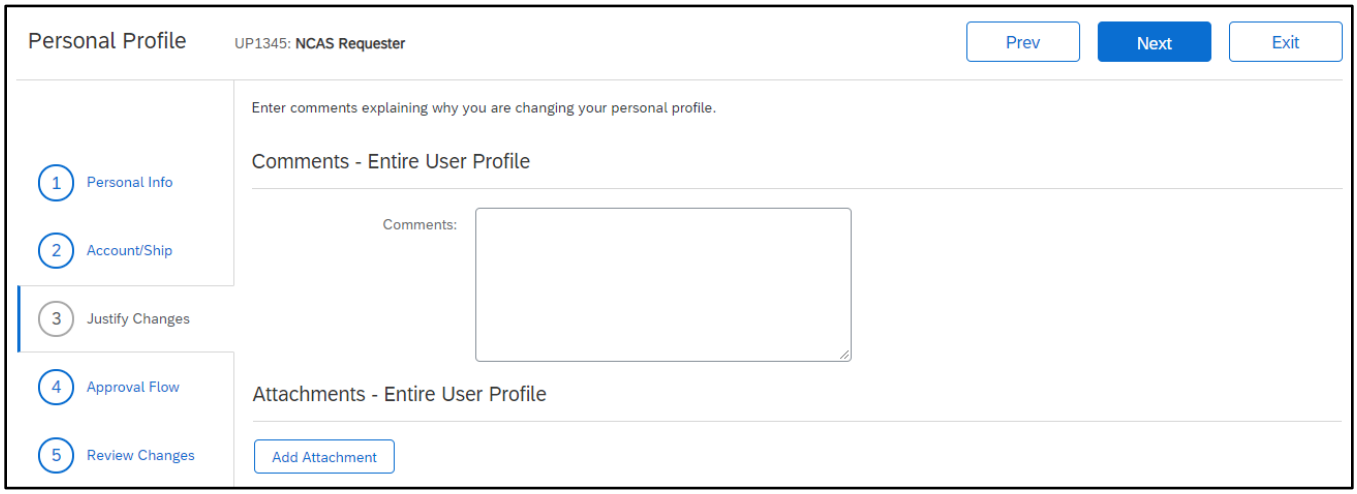
   Note: In addition to using **'Next'** or **'Prev,'** you can also navigate through the profile change using the navigation field on the left side of the screen.

4. Default purchase requisition values for accounting, shipping and delivery information can be set on the **'Account/Ship'** page.

   Notes:
   - The entity cannot be updated on this page. Please refer to the **'Entity Change'** Process Document for instructions on how to change the entity.
   - The values set in the personal profile are default purchase requisition values. These values can be changed on individual purchase requisitions. The default ship-to address is a required field within the user's profile; however, users do not have to specify default account information.
   - The **'Company,' 'Account'** and **'Cost Center'** fields shown are specific to NCAS agencies. For School Systems and Community Colleges, the **'Accounting'** field is a free text field.

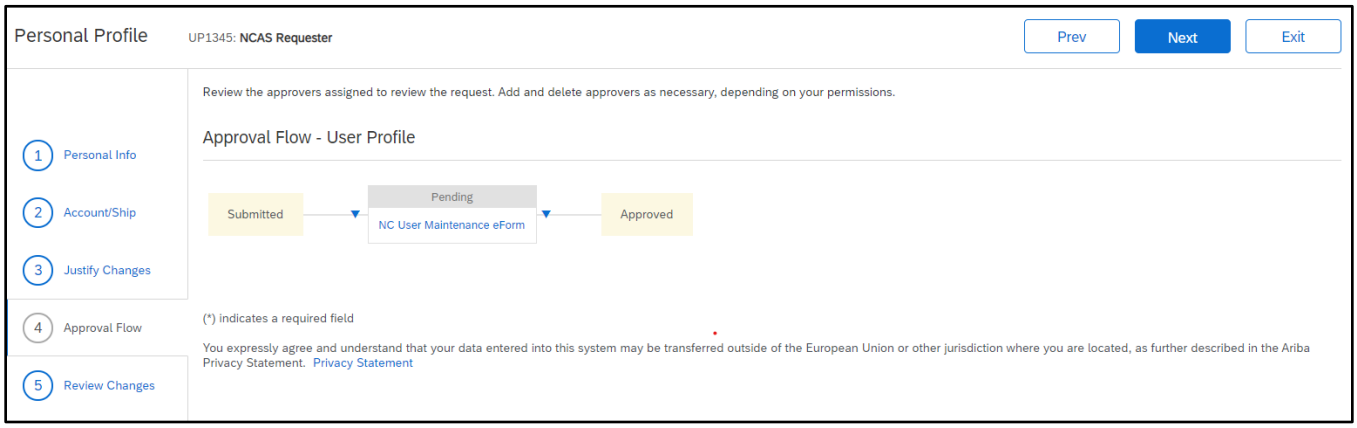


5. Click **'Next'** to add comments and/or attachments on the **'Justify Changes'** page.



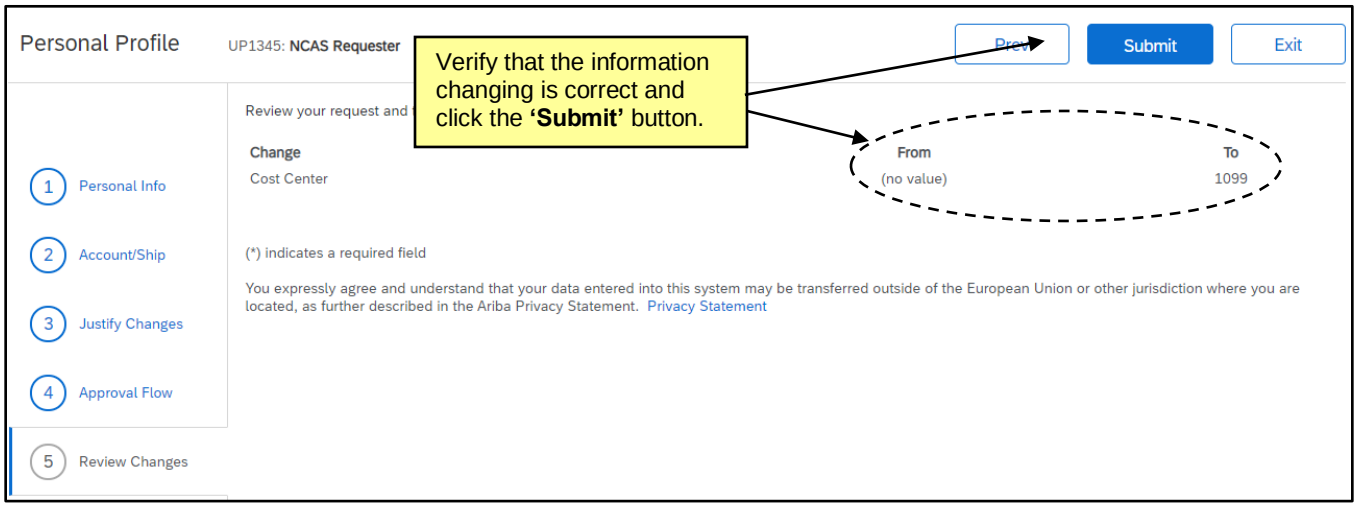
6. Click **'Next'** to go to the **'Approval Flow'** page. Users can view the system generated approval flow and manually add approvers, if necessary.

   Note: The approval flow displayed is **not** the approval flow for Purchase Requisitions created within NC eProcurement. This approval flow is specific to the user profile update.



7. Click **'Next'** to review changes and submit the user profile change.

   Note: Personal profile changes are applied in the system once all required approvals on the request have been completed.



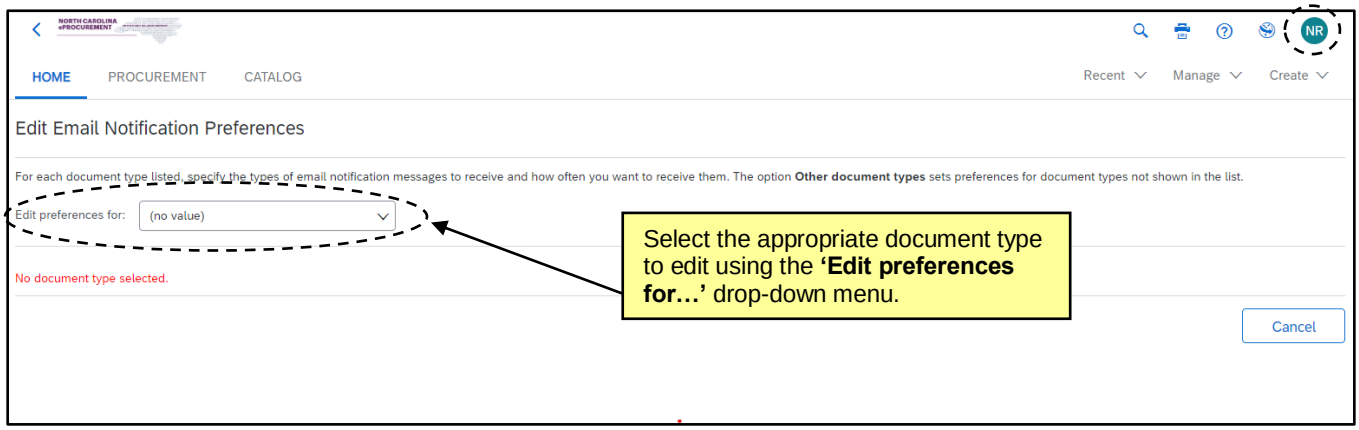
VII. Editing Email Notification Preferences

Notifications are email messages that NC eProcurement automatically sends to preparers, requesters, approvers, and administrators to keep them informed of the progress and status of active approvables. Every notification message describes the purpose of the notification, and most include a link to the relevant request or document in NC eProcurement so that users can quickly take action or access information. Users may edit the frequency and subject matter of their email notifications.

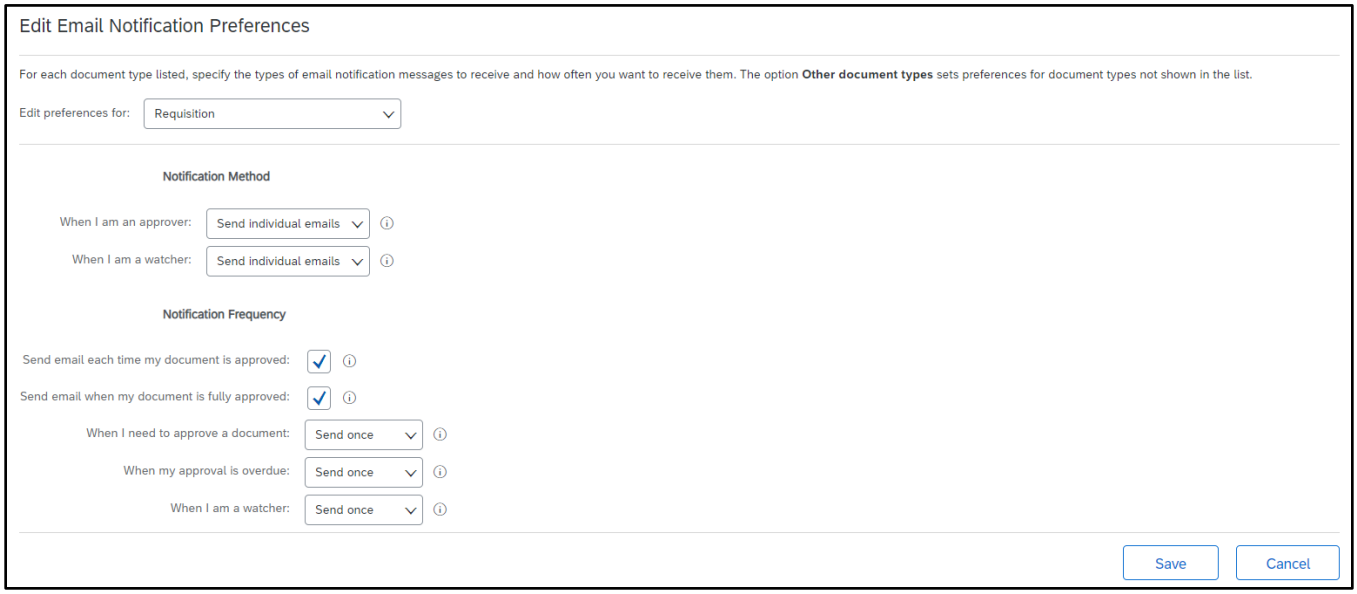
1. Click the **'Initials'** icon in either Guided Buying or Expert View and select **'Change email notification preferences.'**

2. Select the appropriate document type to edit using the **'Edit preferences for…'** drop-down menu.

Note: Email notification preferences must be set independently for each document type. There are many options in the drop-down menu but the most common is **Requisition** for users or approvers.



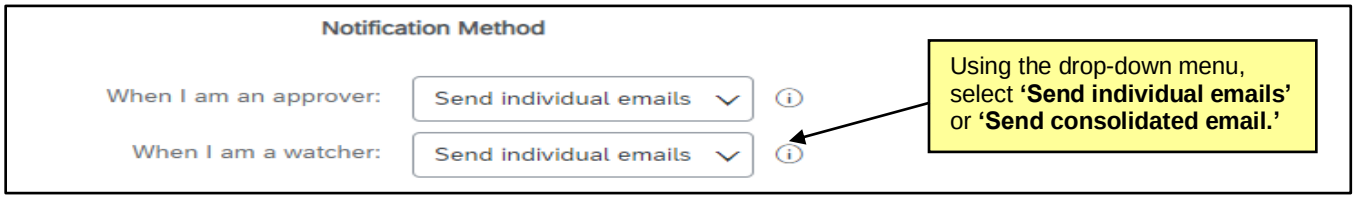
3. The **'Edit Email Notification Preferences'** page will automatically appear when a document type is selected. In this example, **'Requisition'** has been chosen from the drop-down menu.



4. **'Notification method'** allows the user to select whether to receive separate email notifications immediately for each approvable (i.e., **'Send individual emails'**) or to receive all email notifications for the day as one daily email summary (i.e., **'Send consolidated email'**).

   a. **'When I am an approver'** specifies the frequency at which the user wishes to receive email notifications when the user is a required approver in an approval flow.

   b. **'When I am a watcher'** specifies the frequency at which the user wishes to receive email notifications when the user is a watcher in an approval flow.



5. **'Notification frequency'** allows the user to select when and how often they receive email notifications.

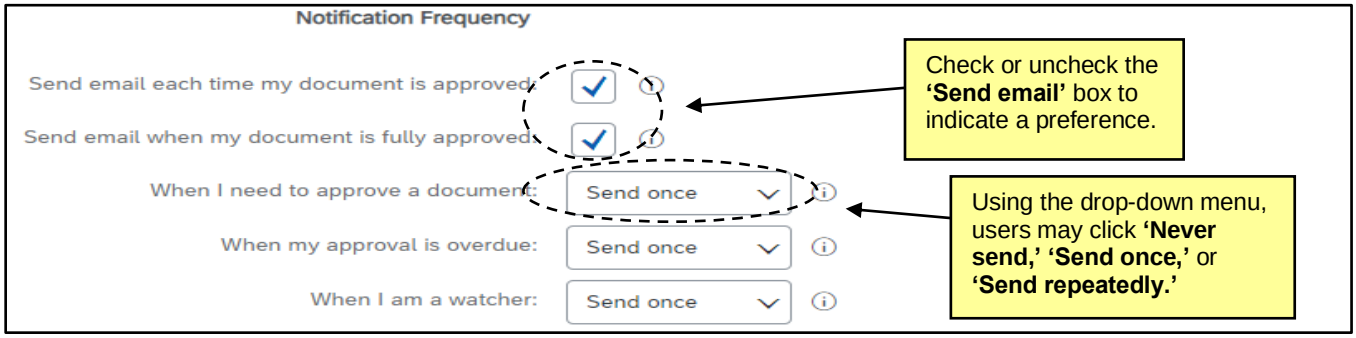
   a. **'Each time the document is approved'** – when the user is a preparer or watcher of an approvable, checking this box specifies whether the user wants to be notified each time an approver approves the document.

   b. **'When the document is fully approved'** – when the user is a preparer or watcher of an approvable, checking this box specifies whether the user wants to be notified when the document is fully approved.

   c. **'When I need to approve a document'** – specifies how often the user wants to be notified when a document is awaiting his/her approval. The user can choose to never receive email notifications, receive one notification, or to receive notifications repeatedly on a daily basis.

   d. **'When my approval is overdue'** – specifies how often the user wants to be notified when his/her approval is overdue. The user can choose to never receive email notifications, receive one notification, or to receive notifications repeatedly on a daily basis.

   e. **'When I am a watcher'** – when the user is a watcher, specifies how often the user wants to receive each watcher notification. The user can choose to never receive email notifications, receive one notification, or to receive notifications repeatedly on a daily basis.



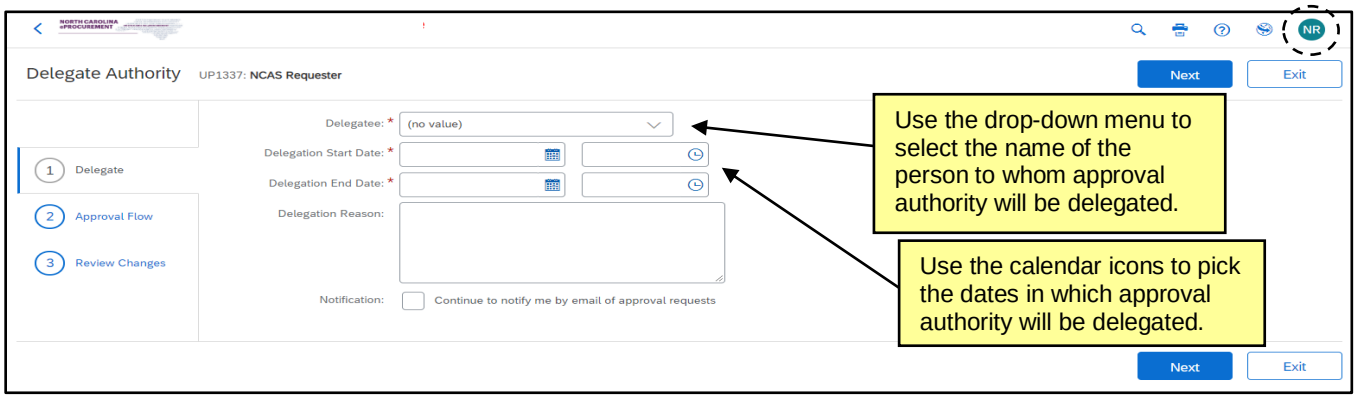
6. Click **'Save'** to save the updated preferences.

7. Click **'Cancel'** to return to the NC eProcurement Dashboard without changing the preferences.

VIII. Delegating Approval Authority

Approvers can delegate their approval authority to another user. A delegation of approval authority is a temporary change, typically set up to handle approvals/denials when the original approver is out of the office (e.g., vacation). The delegation of approval authority can be set at any time from any computer with Internet access.

1. Click the **'Initials'** icon in either Guided Buying or Expert View and select **'Delegate authority.'**



2. **Delegatee:** Select the user's name from the drop-down menu that will be responsible for approving the purchase requisitions while the normal approver is out of the office. If the user's name is not in the drop-down menu, select **'Search for more…'** to search for the user.

   Note: The delegatee must have the same or greater delegation amount as the delegator.

3. **Delegation Start Date:** Use the calendar icon to enter the date in which the delegation should begin.

4. **Delegation End Date:** Use the calendar icon to enter the date in which the delegation should end.

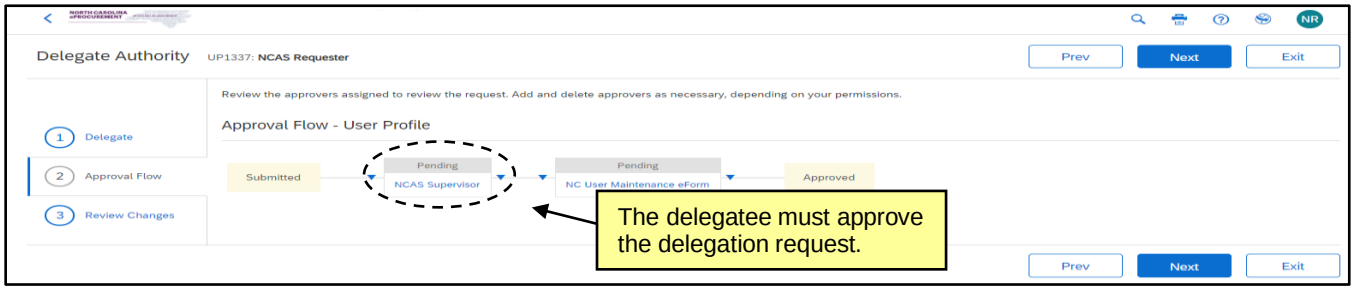
5. **Delegation Reason:** Enter comments as to why this delegation request is being entered.

6. **Notification:** Users have the option to continue to be notified of approval requests throughout the delegation period. To do so, check the box next to **'Continue to notify me by email of approval requests.'**

7. Click **'Next'** to continue.

   Note: The user to whom approval authority is being delegated must approve all delegation requests. In some cases, the user's supervisor must approve the request as well.

8. Review changes and click **'Submit.'**



Notes:

- If the original approver logs into the NC eProcurement during the period in which they have set a delegation of approval authority, an Active Delegation of Authority page displays. This page reminds the approver of the individual's name who is now designated to approve his/her work and the timeframe for the delegation of authority. It also gives the approver the option to continue or stop using the delegation. In either case, the approver has the ability to approve/deny purchase requisitions. When the approver selects to stop the delegation of approval, the delegated approval authority is deactivated.

- **(NCAS Only):** Delegating authority also applies to receiving for users who desktop receive.

IX. Preferred Browser Settings

NC eProcurement should work in all browsers. Chrome is recommended when possible.

X. User Security

Please keep the following points in mind regarding the security of NC eProcurement:

1. Do not give out password information. The NCID User ID and password serve to identify users. Users are responsible for any action taken in NC eProcurement on behalf of their user profile.

2. Individual NC eProcurement sessions terminate after 30 minutes of inactivity. Users will receive an inactivity warning message before the user is logged out of the system. This is for each user's protection. Users must choose to stay logged in or log back into the system if they are automatically logged out.

   Note: When accessing Punchout Catalogs, it is important to recognize that being active on the vendor's punchout site is not considered active in NC eProcurement. If a punchout shopping session takes more than 30 minutes, the NC eProcurement site may have logged out and all items will need to be re-added.

3. NC eProcurement is a safe and secure Internet site. It encrypts transactions while they are transmitted through the Internet so that there is no tampering with the data or account information.

4. Using an automatic screen saver with a password lock helps to maintain the security of the workspace.

5. Reports and other printed materials may be confidential. Be sure to maintain the security of any printed documents generated in NC eProcurement.

6. Log out of the system when finished working.

7. NCID will send email reminders to users to change their password every 90 days.

8. Passwords must adhere to NCID requirements. Please visit https://ncid.nc.gov for more information on NCID password requirements.