NC eProcurement

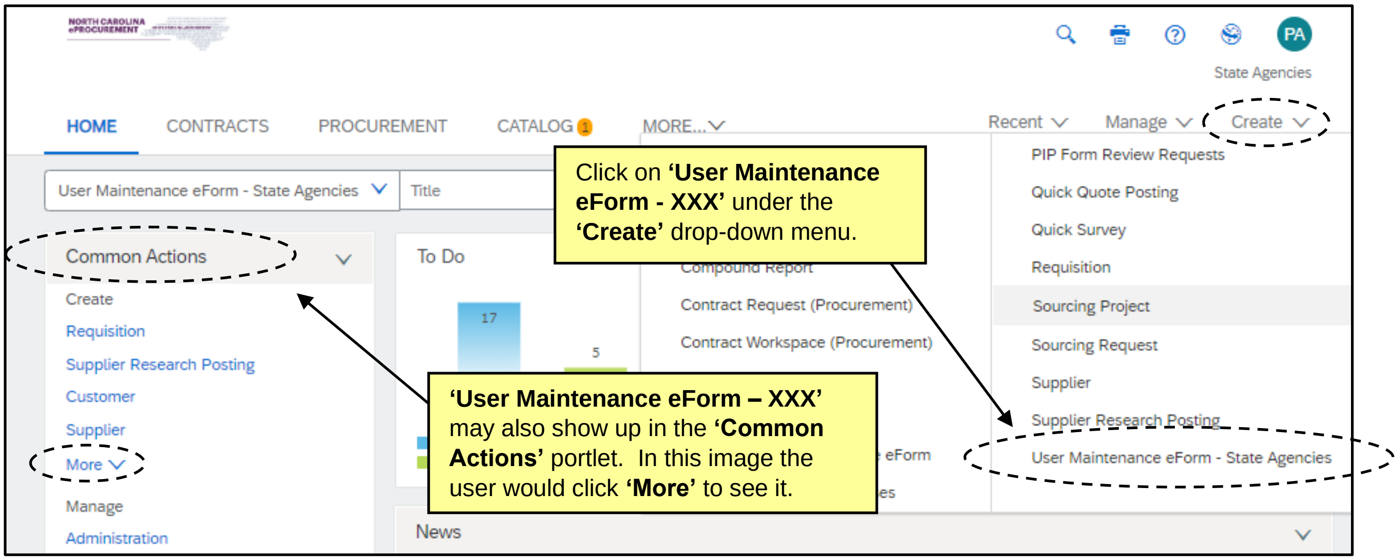
System Administrator

System Administrators at each entity can directly update user and address information within NC eProcurement. To do so, System Administrators use electronic forms within the tool called eForms. These eForms are easy-to-use pages accessible from the **'Create'** shortcut menu. System Administrators are defined by users belonging to the **'NC User Maintenance eForm'** or **'NC Address Maintenance eForm'** groups. This process guide will show System Administrators how to conduct User Maintenance, Address Maintenance, and Reassign Transactions between users.

I. User Maintenance

1. User Maintenance can only be accessed and completed through the Expert View of NC eProcurement. There is no way to access the User Maintenance eForm through the Guided Buying View.

2. To access the User Maintenance eForm, select **'User Maintenance eForm – State Agencies'** (for NCFS agencies) or **'User Maintenance eForm – Public Organizations'** (for EPLite entities) from the **'Common Actions'** portlet or the **'Create'** menu. This brings up the **'User Maintenance eForm** page.



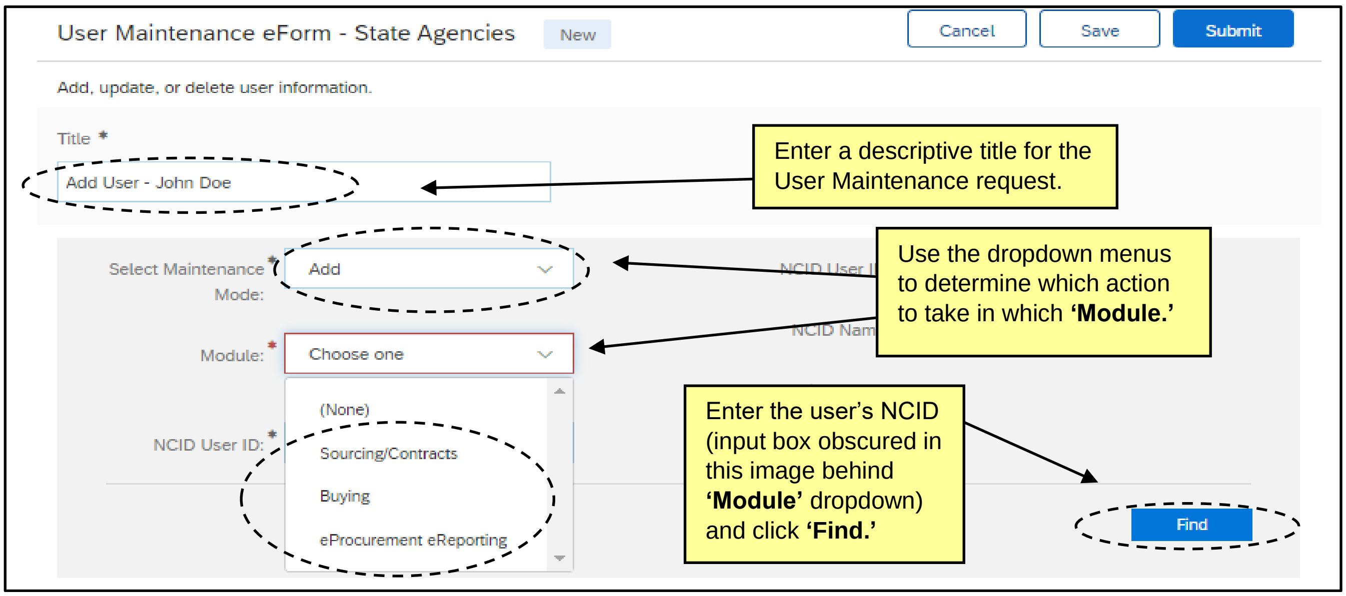
3. Begin by entering a descriptive title for the User Maintenance request (e.g., "Add User – John Doe").

4. Next, select the action to take by choosing from the **'Select Maintenance Mode'** dropdown menu. Choices include **'Add,' 'Update,'** or **'Delete'** a user.

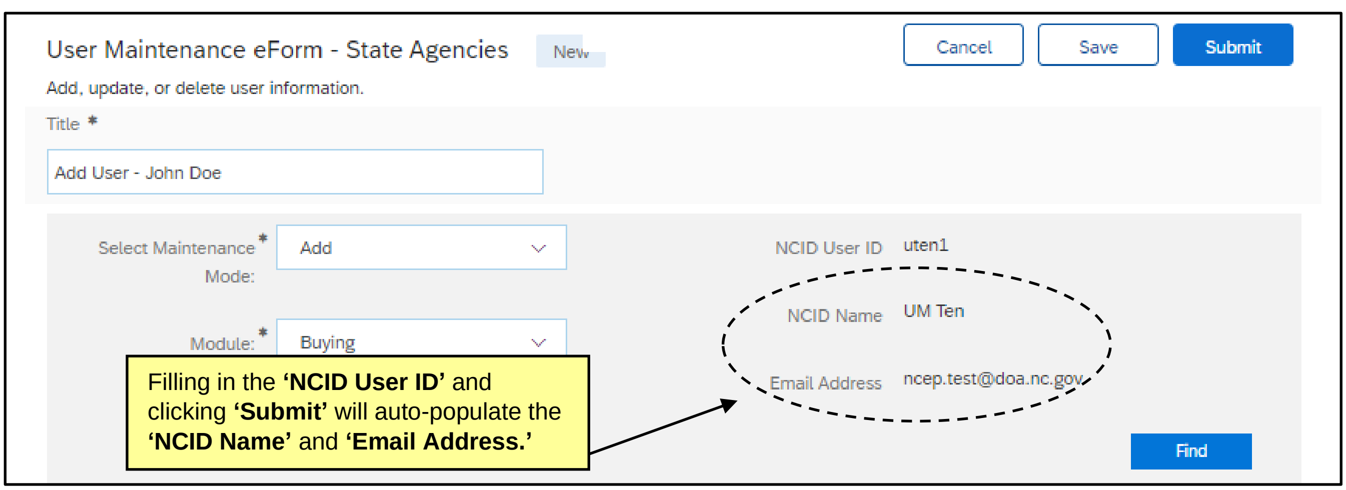
5. Next, select which **'Module'** the request is for from the dropdown menu. Choices include **'Sourcing/Contracts,' 'Buying,'** or **'eProcurement eReporting.'**

6. Enter the **'NCID User ID'** of the user for the action and click the blue **'Find'** button.

   Notes:
   - It may be necessary to click the **'Find'** button twice.
   - Once a User Maintenance request is submitted, the NC eProcurement Help Desk will be notified, and they will review and approve the request before the changes are finalized in the system.
   - Users must have an active NCID User ID set up before they can be added, updated, or deleted from NC eProcurement through the User Maintenance eForm.
   - An error message of **'The NCID user does not exist'** indicates the user does not exist in NCID.
   - If the NCID is associated to an Individual or Business account, the System Administrator will see an error message stating, **'Only a State or Local NCID account may be used with NCEP.'** NCID may be accessed by visiting https://ncid.nc.gov.



7. Entering a valid NCID will automatically populate the **'NCID Name'** and **'Email Address'** fields.



a. Adding a User

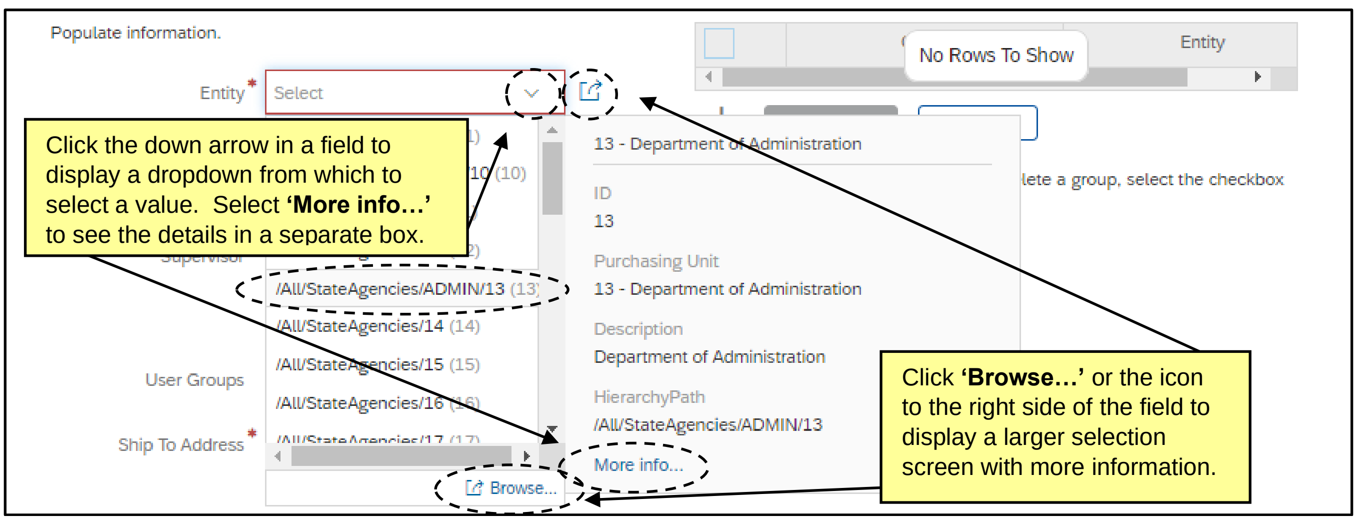
1. To add a new user to NC eProcurement, select **'Add'** on the **'Select Maintenance Mode'** dropdown on the **'User Maintenance eForm'** page and select **'Buying'** from the **'Module'** dropdown.

2. Enter the NCID of the user for the action and click the blue **'Find'** button.

   Note: If the user already exists in NC eProcurement, an error message of "The specified user already exists in the system. Please use the Update operation to complete any modifications" will appear under the **'NCID User ID'** field.

3. After selecting a valid NCID, populate all relevant fields including the five required fields as noted by an asterisk (*). All values can be selected via a dropdown menu by clicking the down arrow on the right side of the field.

   Notes:
   - The dropdown arrow can be clicked to open a menu that will display the first 30 entities as well as a message at the bottom of the list that states **'Your search results exceed the limit. Change the search criteria to narrow your results.'**
   - Hovering over a selection from the dropdown will display more information in a box to the right. Clicking on **'More info…'** at the bottom of that box will display the information in a separate box.
   - Selecting **'Browse…'** at the bottom of the dropdown (or the icon to the right side of the field) will display a larger selection screen with more information.



   a. **Entity***: This field is for the State Agency, Community College, LEA, or Local Government to which the new user belongs.

      Note: A System Administrator may request for a new user to be added to a different entity than their own. This request will result in the NC eProcurement Help Desk manually verifying that the user has Cross-Entity access.

b. **Management Level***: The management level field determines the new user's PR approval flow.

Notes:
- A management level of **'0'** indicates that all Purchase Requisitions for the new user will require supervisor approval. A management level of **'9999999'** indicates that no supervisor approval is required for Purchase Requisitions.
- When a management level of **'9999999'** is selected, the user should also be added to the **'NC No Supervisor'** group.

c. **Supervisor***: Select the new user's NC eProcurement supervisor. Depending on the user's management level, the selected supervisor will have to approve Purchase Requisitions entered by the new user. This field will display options scoped to the Entity.

Note: A supervisor is only required when the **'Module'** is **'Buying'** and the **'Management Level'** is below **'9999999.'**

d. **User Groups:** This field is for approval flow purposes and auto populates based on the **'Entity.'**

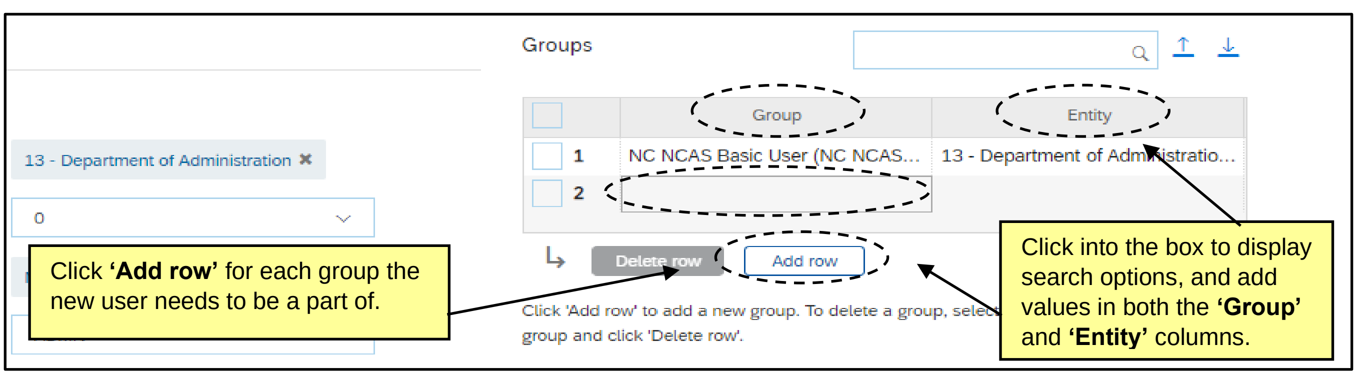
Note: When **Entity 13 – Department of Administration, Entity 08 – Department of Public Instruction,** or **Entity 2B – Division of Public Health** is selected, this field will display as a dropdown and enables users to specify an additional level of hierarchy within the entity (e.g. A user who works for the Office of State Personnel would belong to Entity 13 – Department of Administration with a User Group of **'OSPN.'**)

e. **Ship To Address*:** This field sets the default address to which items purchased through NC eProcurement should be shipped.

f. **Bill To Address*:** This field sets the default address to which invoices associated with NC eProcurement purchases should be sent.

g. **Groups**: Select the appropriate groups to which the new user should belong. Some groups are universal (i.e., NC NCFS Basic User) while others are entity-specific and are preceded by an entity abbreviation (i.e., ADMN IT Approver). Groups are used to determine the permissions and capabilities a user has to take certain actions in the system. Users can be added to multiple groups. See **Section IV Group Definitions** for a list of groups and their descriptions.

Notes:
- After selecting a value in the **'Group'** column, click into the neighboring **'Entity'** column and assign the newly-added group to the user's entity.
- Click **'Add row'** to add a new group, then click into the box to display search options.

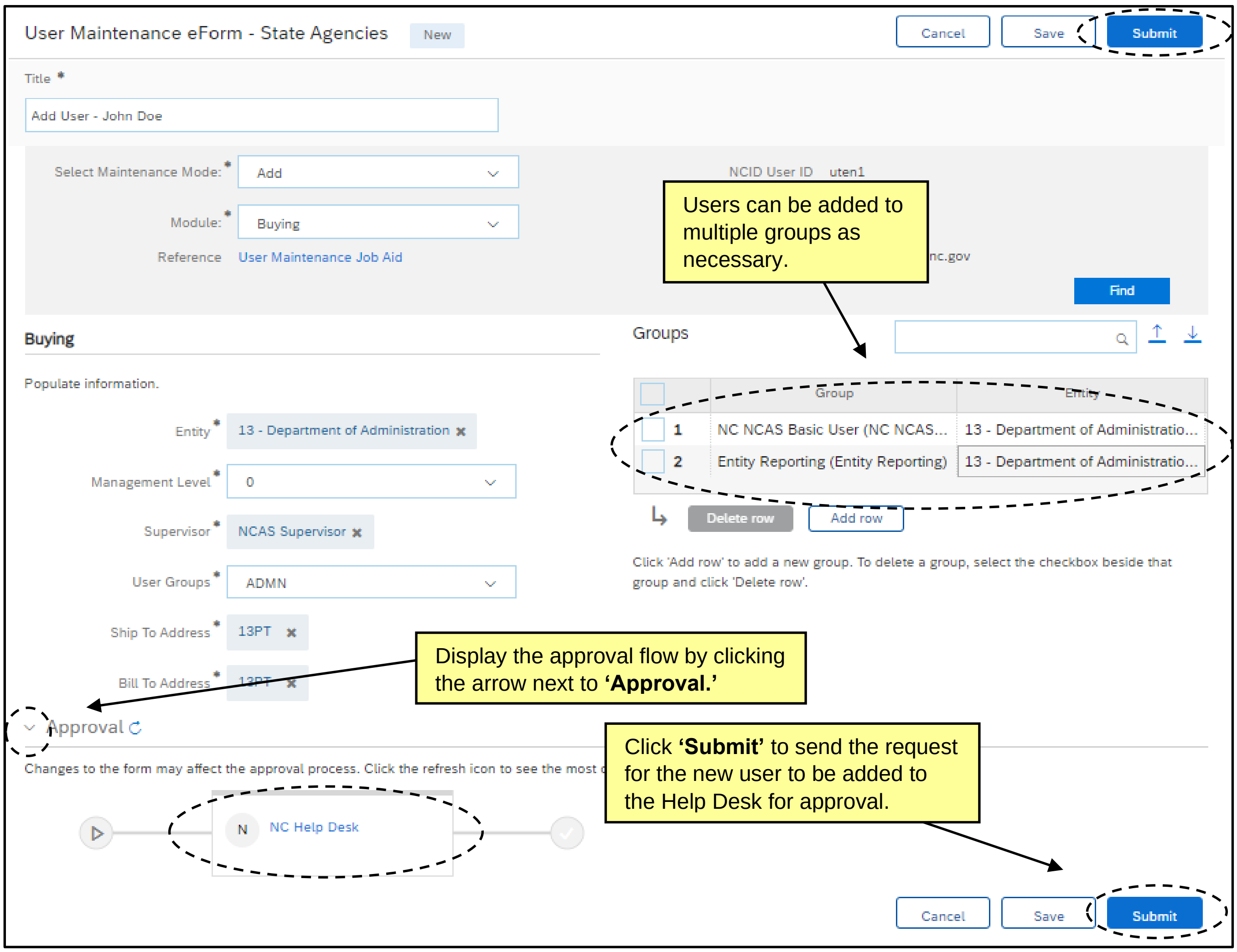


4. Once all required fields have been populated, the approval flow can be displayed by clicking the arrow to the left of **'Approval'** at the bottom of the screen. The approval flow will show that the eForm will be routed to the NC eProcurement Help Desk (labeled as **'NC Help Desk'**) for review and approval.

   Note: Users in DHHS entities will see a **'DHHS eForm Approver'** group before the Help Desk approver.

5. Click **'Submit'** to request the creation of the new user.

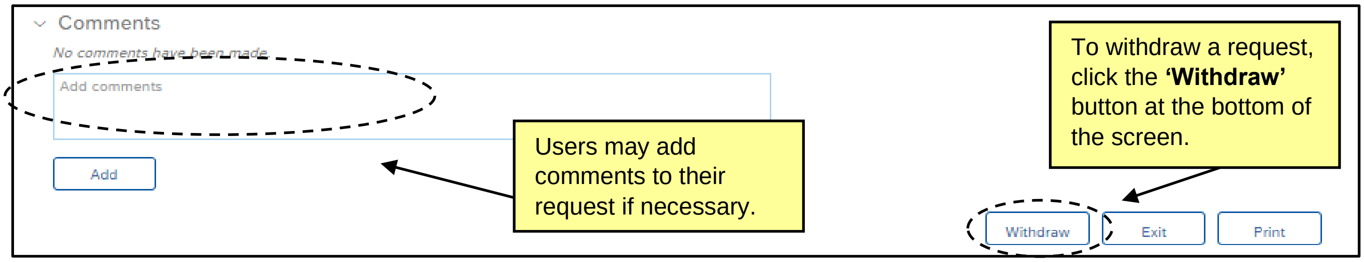
   Note: At any time when creating a User Maintenance eForm, the System Administrator may opt to save the request to submit at a later time by clicking the **'Save'** button at the bottom of the screen.



6. After submitting the eForm, the System Administrator will see a pop-up window verifying that the eForm was successfully submitted and the eForm will be given an ID number.

7. Click **'Proceed'** to view the request or find it in the **'My Documents'** portlet in **'Submitted'** status. At the bottom of the screen, the System Administrator may add comments or withdraw the request. If complete, select the **'Exit'** button.

The Help Desk will either approve the request, which adds the new user to the system immediately, or deny it, at which point the System Administrator can edit and resubmit the request or delete it. Either way, notification will be given via email, and the updated status will display in the **'My Documents'** portlet.



b. Updating a User

1. To update an existing user in NC eProcurement, select **'Update'** in the **'Select Maintenance Mode'** dropdown on the **'User Maintenance eForm'** and select the **'Module'** to be updated.

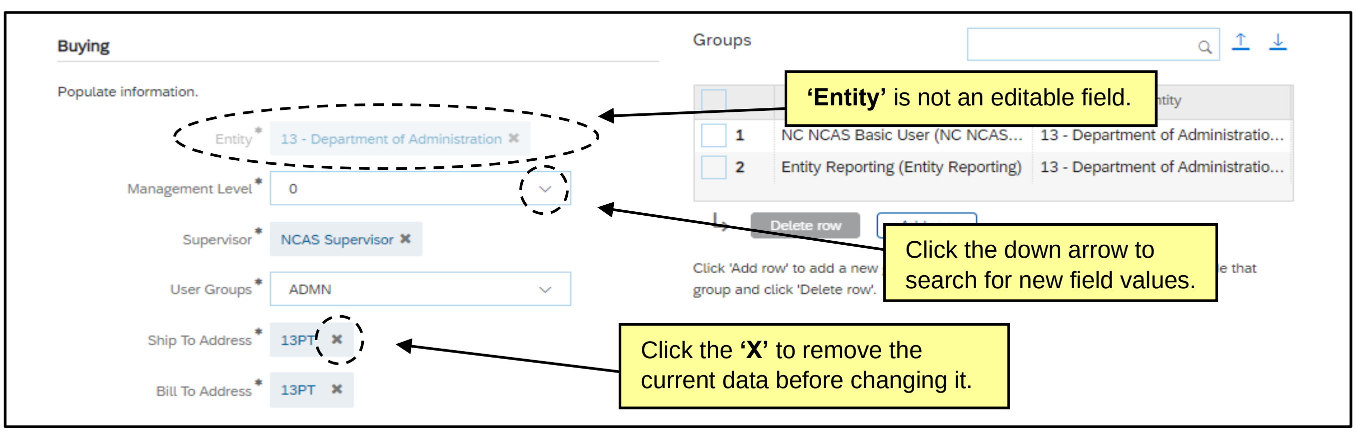
2. Enter the existing user's NCID in the **'NCID User ID'** field and click **'Find.'** It may be necessary to click **'Find'** twice.

   Note: If the NCID entered does not exist, the following error message will appear: "The specified user does not exist in the system. Please use the Add operation to add the user."

3. The existing user's current information will display, including their **'Entity,' 'Management Level,' 'Supervisor,' 'User Groups,' 'Ship To Address,' 'Bill To Address,'** and **'Groups.'** All fields besides **'Entity'** are editable.

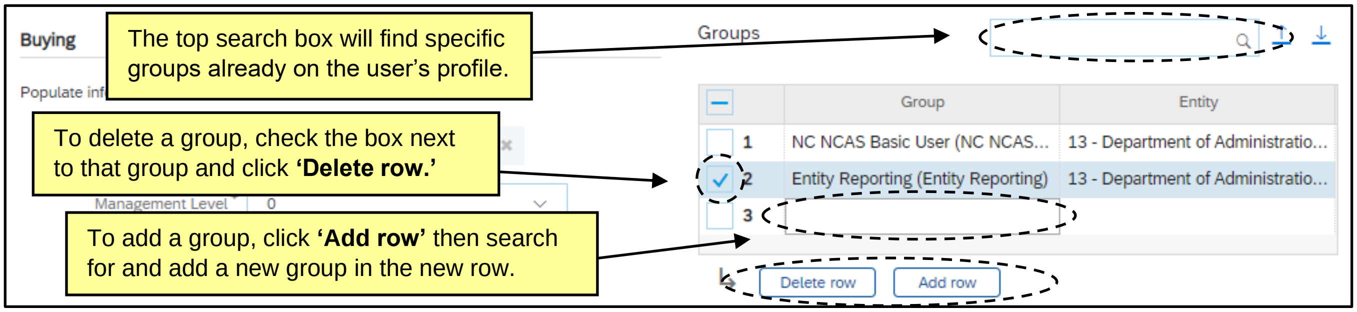
   Note: The above information will display only in the **'Buying'** module. In **'Sourcing/Contracts,'** only **'Entity'** and **'Groups'** appear, and in **'eProcurement eReporting,'** only **'Entity'** appears.

4. Make any desired changes to the editable fields. To change the **'Management Level'** or **'User Groups,'** click the down arrow in the search box and select the new value. To change the **'Supervisor,' 'Ship To Address,'** or **'Bill To Address,'** click the **'X'** to the right of the current value to remove it, then click the down arrow in the search box to select the new value.



5. To delete a group associated with an existing user, click the checkbox to the left of that group and click the **'Delete row'** button. To add a group to an existing user's profile, click **'Add row'** and select the desired group from the dropdown, then add the appropriate entity in the column to its right.

   Note: The search box above the **'Groups'** table searches for a specific group within the table below.



6. Once all the desired updates have been made, the approval flow can be displayed by clicking the arrow to the left of **'Approval'** at the bottom of the screen. The approval flow will show that the eForm will be routed to the NC eProcurement Help Desk (labeled as **'NC Help Desk'**).

   Note: Users in DHHS entities will see a **'DHHS eForm Approver'** group before the Help Desk approver.

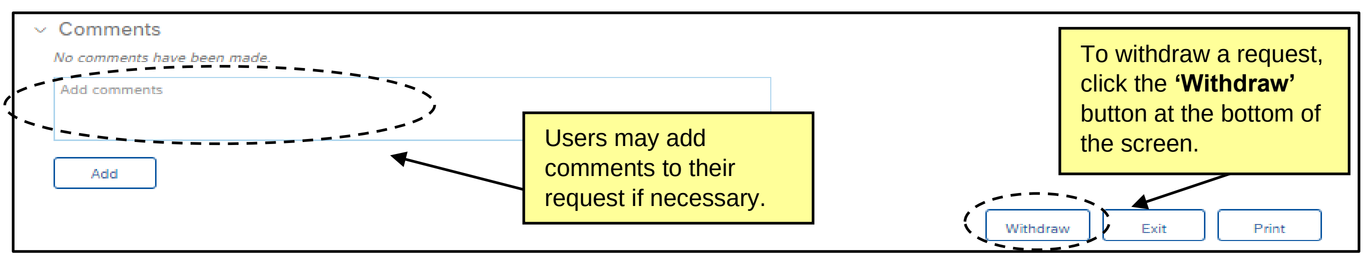
7. Click **'Submit'** to update the existing user's information in the system.

   Note: At any time when creating a User Maintenance eForm, the System Administrator may opt to save the request to submit at a later time by clicking the **'Save'** button at the bottom of the screen.

8. After submitting the eForm, the System Administrator will see a pop-up window verifying that the eForm was successfully submitted and the eForm will be given an ID number.

9. Click **'Proceed'** to view the request or find it in the **'My Documents'** portlet in **'Submitted'** status. At the bottom of the screen, the System Administrator may add comments or withdraw the request. If complete, select the **'Exit'** button.

   The Help Desk will either approve the request, which updates the user to the system immediately, or deny it, at which point the System Administrator can edit and resubmit the request or delete it. Either way, notification will be given via email, and the updated status will display in the **'My Documents'** portlet.



c. Deleting A User

1. To delete an existing user in NC eProcurement, select **'Delete'** on the **'Select Maintenance Mode'** dropdown on the **User Maintenance eForm** page and select the **'Module'** from which to delete the user.

2. Enter the existing user's NCID in the **'NCID User ID'** field and click **'Find.'** It may be necessary to click **'Find'** twice.

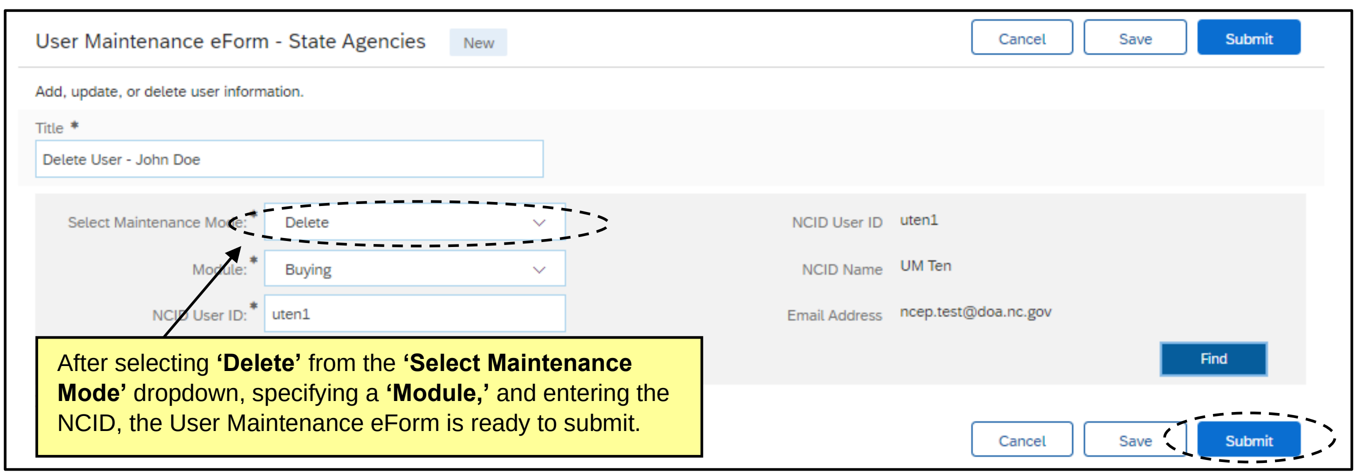
   Notes:
   - If the NCID entered does not exist, the following error message will appear: "An unexpected error has occurred. Please contact the NC eProcurement Help Desk for additional assistance."
   - If the NCID has already been deactivated by NCDIT, the following error message will appear: "The NCID user has been deactivated." In this case, the user should follow through with deleting the profile.

3. Once the existing user's NCID and email address populate, the approval flow can be displayed by clicking the arrow to the left of **'Approval'** at the bottom of the screen. The approval flow will show that the eForm will be routed to the NC eProcurement Help Desk (labeled as **'NC Help Desk'**).

   Note: Users in DHHS entities will see a **'DHHS eForm Approver'** group before the Help Desk approver.

4. Click **'Submit'** to request that the Help Desk delete the existing user's information from the system.

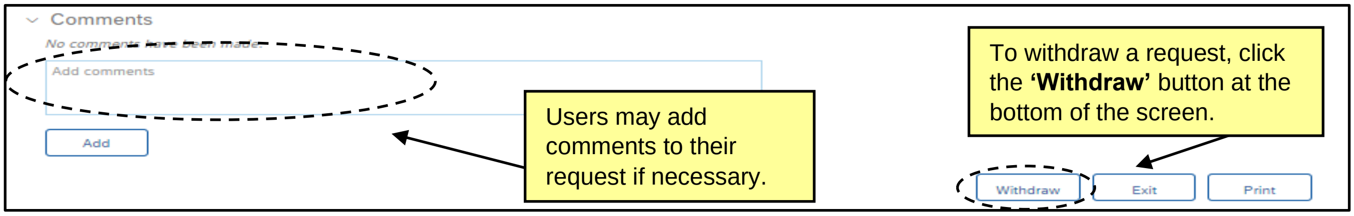
   Note: All transactions created by the user must be in a completed state before the user can be deleted. For NCFS users, all purchase orders must be **'Received,' 'Cancelled,'** or in **'Ordered'** status with a quantity of zero. All transactions with a **'Composing,' 'Denied,' 'Submitted,'** or **'Failed'** status must be resolved before the user can be deleted and should be resolved before the NCID User ID is inactivated within the NCID system. For more information on reassigning transactions from one user to another, see **Section III. Reassigning Transactions**.



5. After submitting the eForm, the System Administrator will see a pop-up window verifying that the eForm was successfully submitted and the eForm will be given an ID number.

6. Click **'Proceed'** to view the request, or find it in the **'My Documents'** portlet in **'Submitted'** status. At the bottom of the screen, the System Administrator may add comments or withdraw the request. If complete, select the **'Exit'** button.

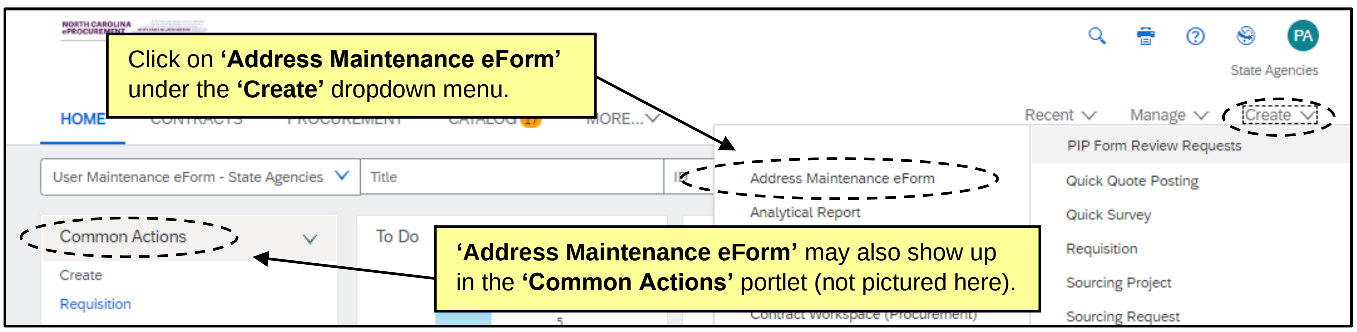
   The Help Desk will either approve the request, which removes the user from the system immediately, or deny it, at which point the System Administrator can edit and resubmit the request or delete it. Either way, notification will be given via email, and the updated status will display in the **'My Documents'** portlet.



II. Address Maintenance

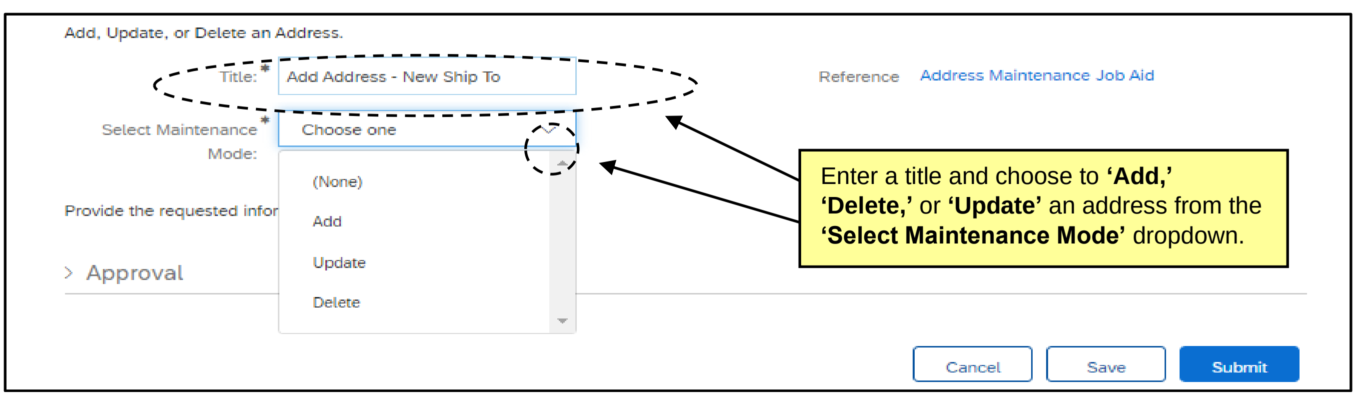
1. Address Maintenance can only be accessed through the Expert View of NC eProcurement. There is no way to access the Address Maintenance eForm through the Guided Buying View.

2. To access the Address Maintenance eForm, select **'Address Maintenance eForm'** from the **'Common Actions'** portlet or from the **'Create'** menu.



3. This brings up the **'Address Maintenance eForm'** page. Begin by entering a title for the Address Maintenance request (e.g., "Add Address – New Ship To").

4. Next, select the action to take by choosing from the **'Select Maintenance Mode'** dropdown menu. The System Administrator can choose to **'Add,' 'Delete,'** or **'Update'** an address.



a. Adding an Address

1. To add an address, select **'Add'** from the **'Select Maintenance Mode'** dropdown menu on the **'Address Maintenance eForm'** then provide an **'Address Unique Name'** and click outside of that field.

   Notes:
   - If the **'Address Unique Name'** already exists in NC eProcurement, an error message of "An unexpected error has occurred. Please contact the NC eProcurement Help Desk for additional assistance" will appear under the **'Address Unique Name'** field.
   - The **'Address Unique Name'** should NOT contain any spaces.

2. After entering a valid **'Address Unique Name,'** additional fields will display below. Populate all relevant fields including the seven required fields as noted by an asterisk (*). All values can be selected either via a dropdown menu by clicking the down arrow on the right side of the field or by typing into a free text field.

   a. **Address Name***: The name of the address will be used in User Profiles and Purchase Requisitions to quickly find the appropriate address (e.g., "Main Office").

   b. **Entity***: The entity to which the address will be added. This field will not default to the System Administrator's entity. If an entity is entered in this field that is outside the System Administrator's entity, the NC eProcurement Help Desk will manually verify that the System Administrator has cross entity permissions.

   c. **Line 1***: The mailing address information for the address being added. Lines 2 and 3 are not required but may be used for additional details.

   d. **City***: Enter the city name.

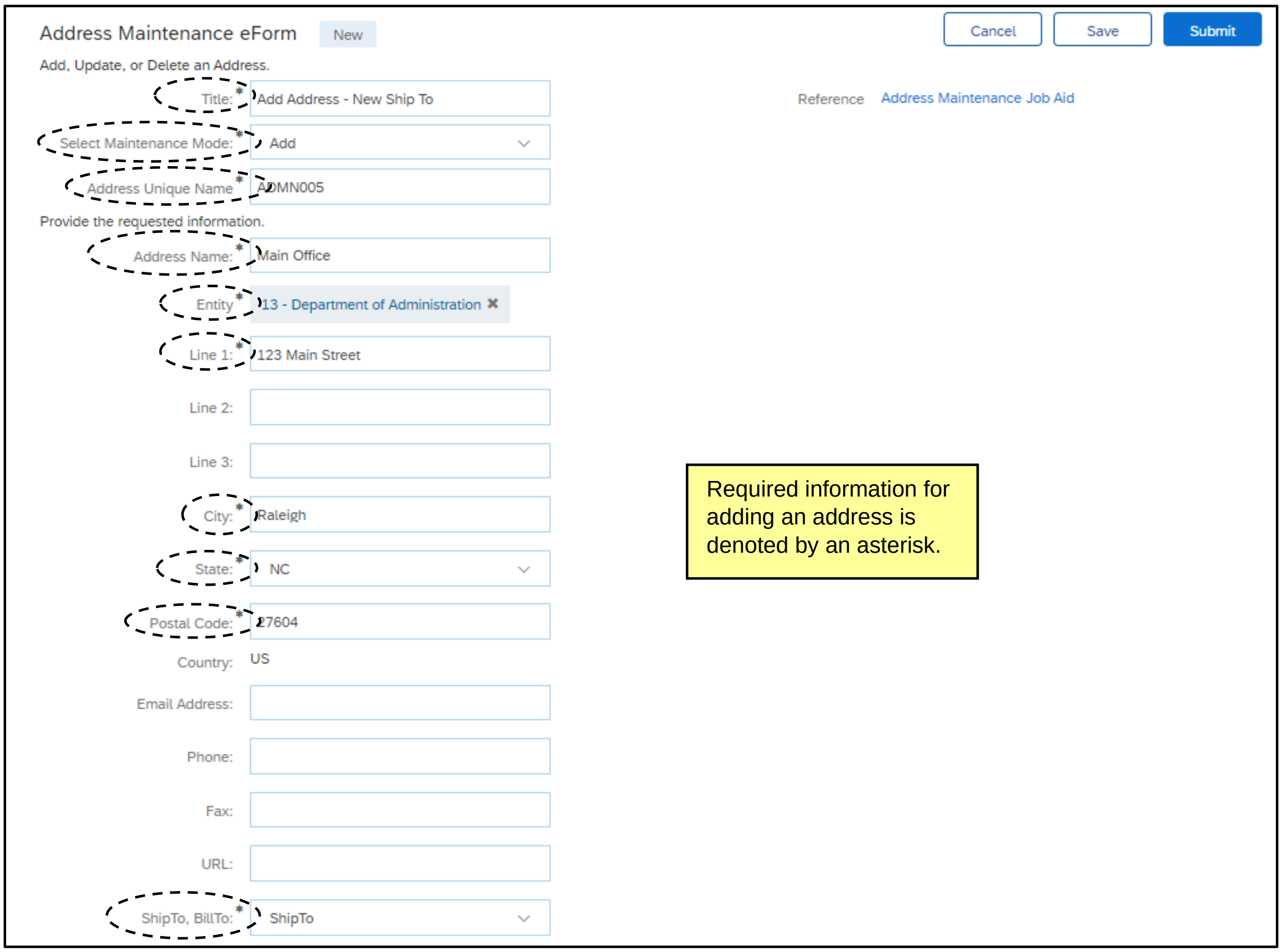
   e. **State***: Select **'NC'** for the two-digit state abbreviation.

   f. **Postal Code***: Enter the zip code of the location. Do not hyphenate the full 9-digit code if used.

   g. **Country**: Defaults to **'US'**

h. **Ship To, Bill To***: Select from the dropdown menu whether the new address will be a **'Ship To'** address for goods to be delivered, or a **'Bill To'** address for invoices.

Notes:
- Certain local school systems (LEAs) will see an additional field titled, **'LEA Address ID'** which is a required field for the address mapping process.
- Additional non-required fields are available for System Administrators to add a more detailed address (e.g., Suite 500), an email address, a phone number, a fax number, or a website URL to be associated with the address.



3. Once all the required fields have been populated, the approval flow can be displayed by clicking the arrow to the left of **'Approval'** at the bottom of the screen. The approval flow will show that the eForm will be routed to the NC eProcurement Help Desk (labeled as **'NC Help Desk'**).

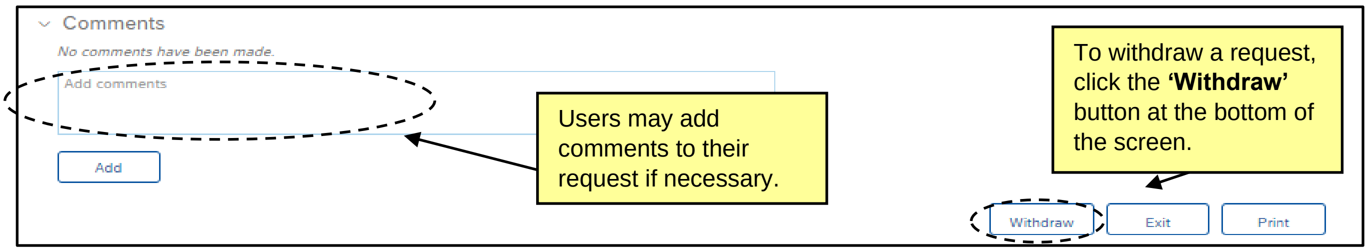
4. Click **'Submit'** to request the new address be added to the system.

   Note: At any time when creating an Address Maintenance eForm, the System Administrator may opt to save the request to submit at a later time by clicking the **'Save'** button at the bottom of the screen.

5. After submitting the eForm, the System Administrator will see a pop-up window verifying that the eForm was successfully submitted and the eForm will be given an ID number.

6. Click **'Proceed'** to view the request, or find it in the **'My Documents'** portlet in **'Submitted'** status. At the bottom of the screen, the System Administrator may add comments or withdraw the request. If complete, select the **'Exit'** button.

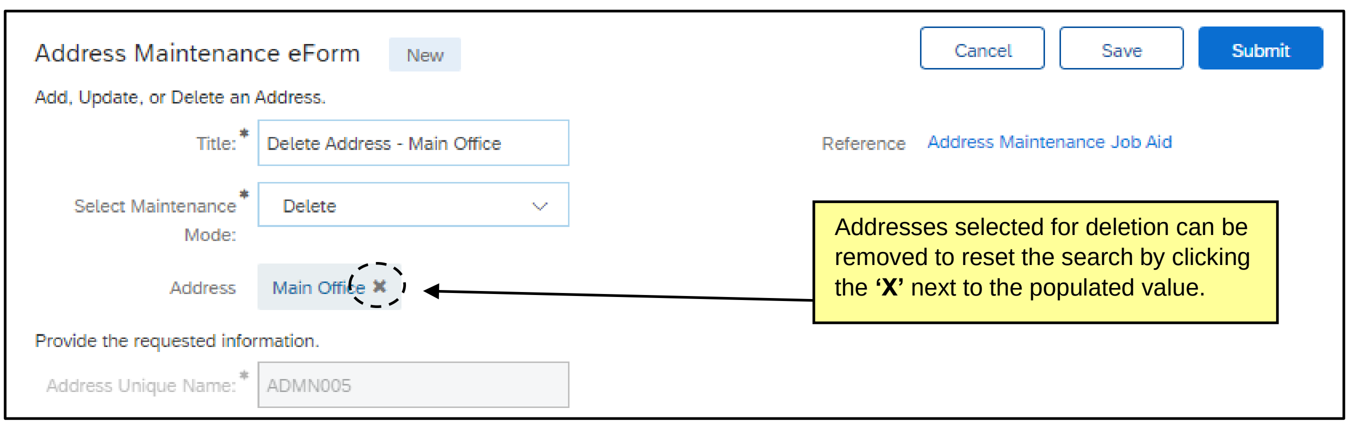
   The Help Desk will either approve the request, which adds the address to the system immediately, or deny it, at which point the System Administrator can edit and resubmit the request or delete it. Either way, notification will be given via email, and the updated status will display in the **'My Documents'** portlet.



b. Deleting an Address

1. To delete an address, select **'Delete'** from the **'Select Maintenance Mode'** dropdown menu on the **'Address Maintenance eForm,'** then select the address to be deleted from the dropdown menu in the **'Address'** field.

2. After selecting a valid address, the **'Address'** field will populate with the selected address, which can be removed to reset the search by clicking the **'X'** within the result. The remaining address information will populate below, although no fields will be editable.



3. At this point the approval flow can be displayed by clicking the arrow to the left of **'Approval'** at the bottom of the screen. The approval flow will show that the eForm will be routed to the NC eProcurement Help Desk (labeled as **'NC Help Desk'**).

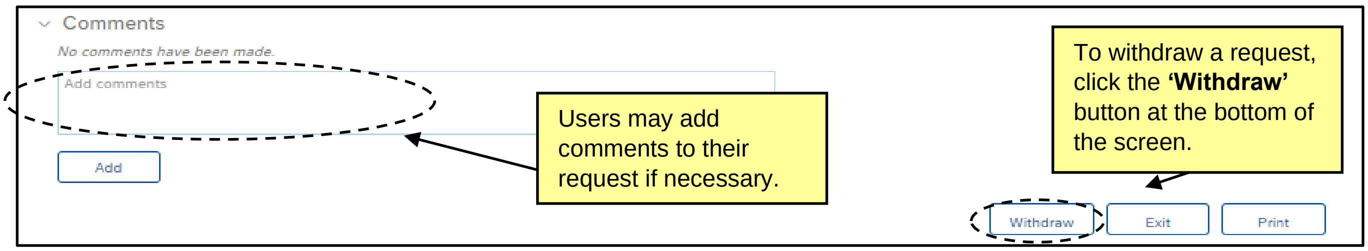
4. Click **'Submit'** to request the address be deleted from the system.

   Note: At any time when creating an Address Maintenance eForm, the System Administrator may opt to save the request to submit at a later time by clicking the **'Save'** button at the bottom of the screen.

5. After submitting the eForm, the System Administrator will see a pop-up window verifying that the eForm was successfully submitted and the eForm will be given an ID number.

6. Click **‘Proceed’** to view the request, or find it in the **‘My Documents’** portlet in **‘Submitted’** status. At the bottom of the screen, the System Administrator may add comments or withdraw the request. If complete, select the **‘Exit’** button.

   The Help Desk will either approve the request, which removes the address from the system immediately, or deny it, at which point the System Administrator can edit and resubmit the request or delete it. Either way, notification will be given via email, and the status will update in the **‘My Documents’** portlet.



c. Updating an Address

1. To update an address, select **‘Update’** from the **‘Select Maintenance Mode’** dropdown menu on the **‘Address Maintenance eForm,’** then select the address to be updated from the dropdown menu in the **‘Address’** field.

2. After selecting a valid address, the **‘Address’** field will populate with the selected address, which can be removed to reset the search by clicking the **‘X’** within the result. The remaining address information will populate below, and six of the required fields, as noted by an asterisk (*), can be edited. Values in these fields can be selected either via a dropdown menu by clicking the down arrow on the right side of the field or by typing into a free text field.

   Note: The following fields will not be editable: **‘Address Unique Name,’ ‘LEA Address ID’** (EPLite Only), **‘Entity,’** and **‘Country.’**

   a. **Address Name***: The name of the address will be used in User Profiles and Purchase Requisitions to quickly find the appropriate address (e.g., “Main Office”).

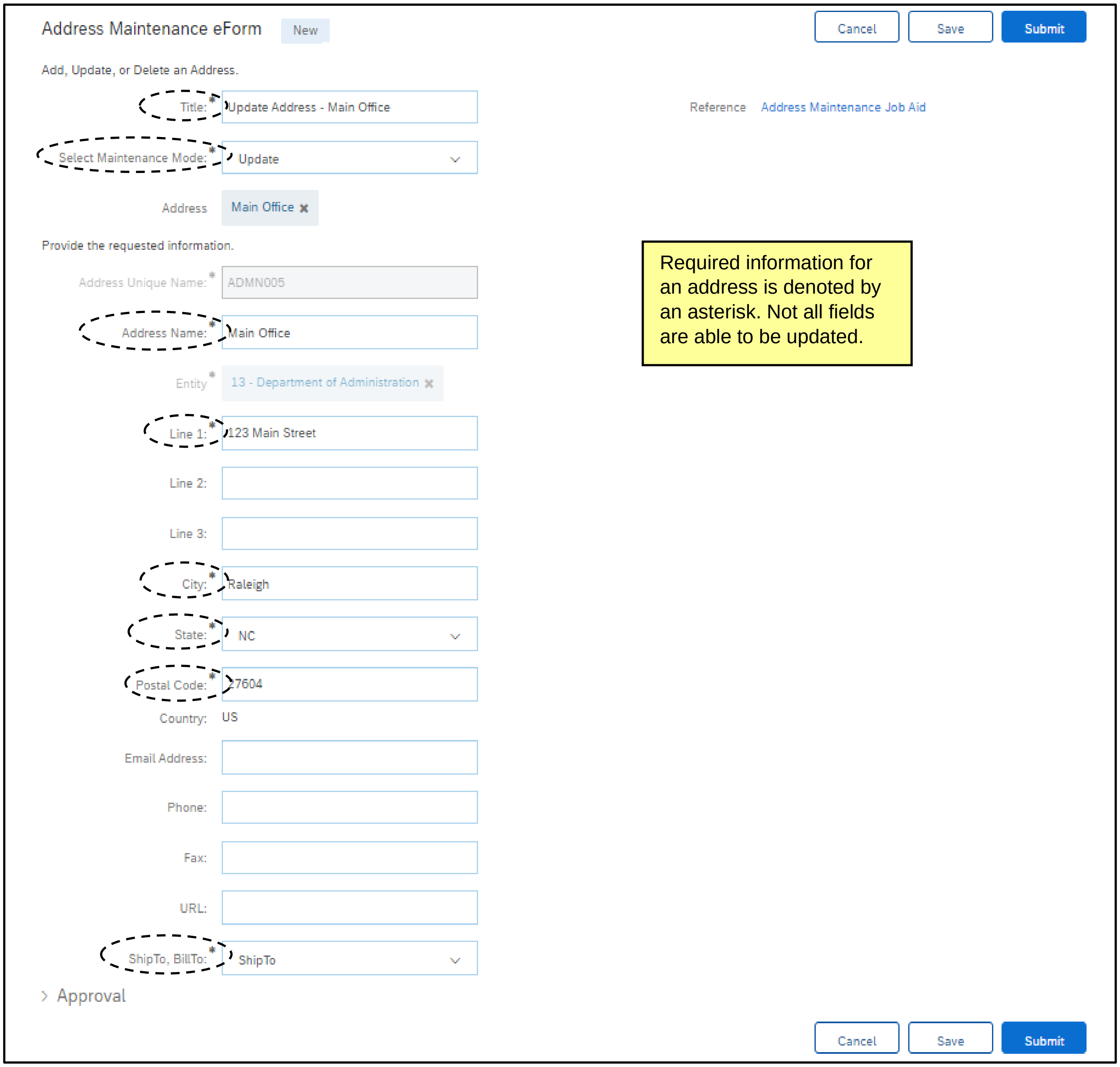
   b. **Line 1***: The mailing address information for the address being added. Lines 2 and 3 are not required but may be used for additional details.

   c. **City***: Enter the city name.

   d. **State***: Select **‘NC’** for the two-digit state abbreviation.

   e. **Ship To, Bill To***: Select from the dropdown menu whether the new address will be a **‘Ship To’** address for goods to be delivered, or a **‘Bill To’** address for invoices

      Note: Additional non-required fields are available for System Administrators to add a more detailed address (e.g., Suite 500), an email address, a phone number, a fax number, or a website URL to be associated with the address. This information will be on the Purchase Orders to provide additional contact information for Vendors to reach out to.



3. Once all the desired updates have been made, the approval flow can be displayed by clicking the arrow to the left of **'Approval'** at the bottom of the screen. The approval flow will show that the eForm will be routed to the NC eProcurement Help Desk (labeled as **'NC Help Desk'**).

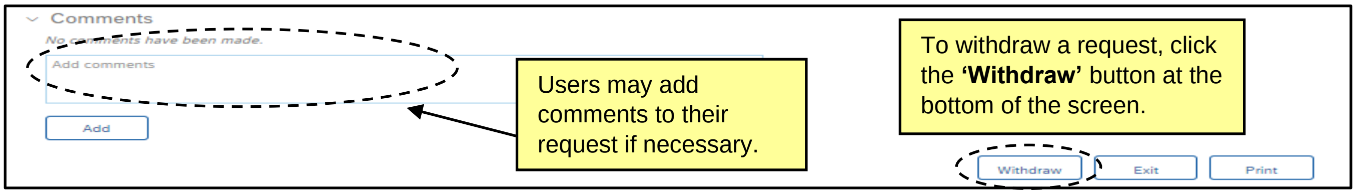
4. Click **'Submit'** to update the existing addresses' information in the system.

   Note: At any time when creating a User Maintenance eForm, the System Administrator may opt to save the request to submit at a later time by clicking the **'Save'** button at the bottom of the screen.

5. After submitting the eForm, the System Administrator will see a pop-up window verifying that the eForm was successfully submitted and the eForm will be given an ID number.

6. Click **‘Proceed’** to view the request, or find it in the **‘My Documents’** portlet in **‘Submitted’** status. At the bottom of the screen, the System Administrator may add comments or withdraw the request. If complete, select the **‘Exit’** button.

   The Help Desk will either approve the request, which updates the address in the system immediately, or deny it, at which point the System Administrator can edit and resubmit the request or delete it. Either way, notification will be given via email, and the updated status will display in the **‘My Documents’** portlet.



III. Reassigning Transactions

1. System Administrators may have the ability to reassign transactions between users. This feature is particularly helpful when users do not close out their open transactions before leaving an entity or changing an entity and the user must be deleted (see **Section I.c. Deleting a User**).

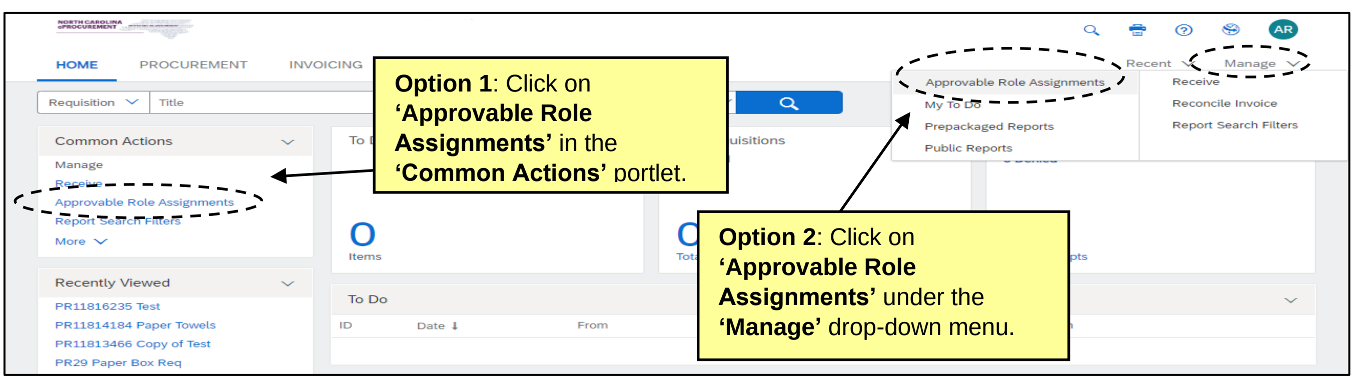
2. There are two groups that a user must have in order to reassign transactions:

   a. **NC Requisition Reassignment**: Users belonging to this group can reassign Purchase Requisitions between users within their entity.

   b. **NC Receipt Reassignment (NCFS Only)**: Users belonging to this group can reassign Receipts between users within their entity.

3. To begin reassigning transactions, System Administrators must be in Expert View. There is no option to reassign transactions from the Guided Buying view.

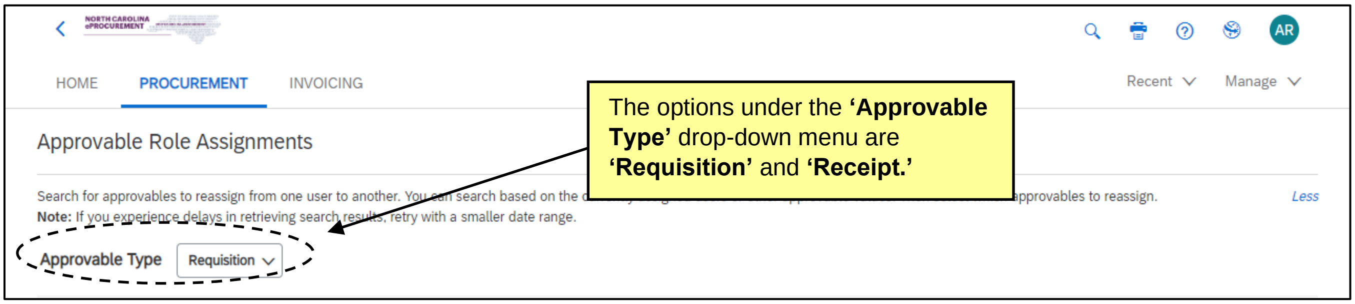
4. To begin reassigning transactions, select **‘Approvable Role Assignments’** from the **‘Common Actions’** portlet or from the **‘Manage’** menu.



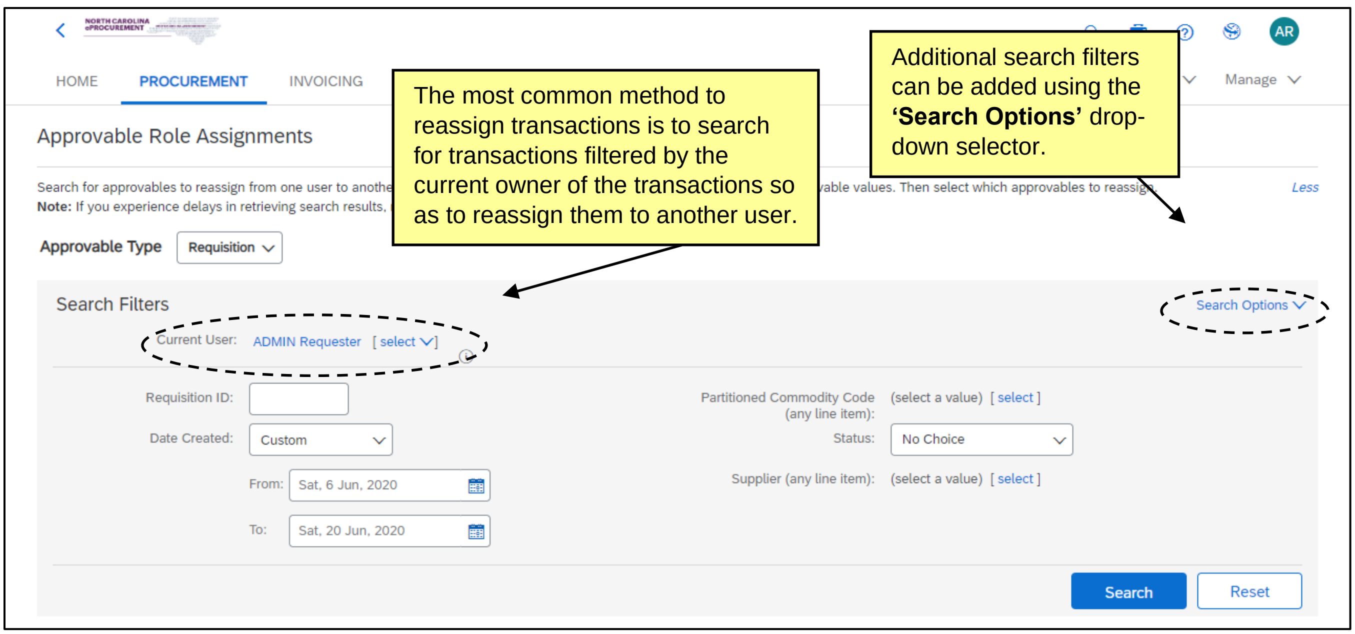
5. This displays the Approvable Role Assignments page.

6. If the System Administrator has access to both **'NC Requisition Reassignment'** and **'NC Receipt Reassignment'** groups, they must select which Approvable Type will be reassigned.

   Note: The process for reassigning Purchase Requisitions and reassigning Receipts is identical after selecting the Approvable Type from the drop-down.



7. From this page, System Administrators can search for transactions to reassign using the necessary search filters.



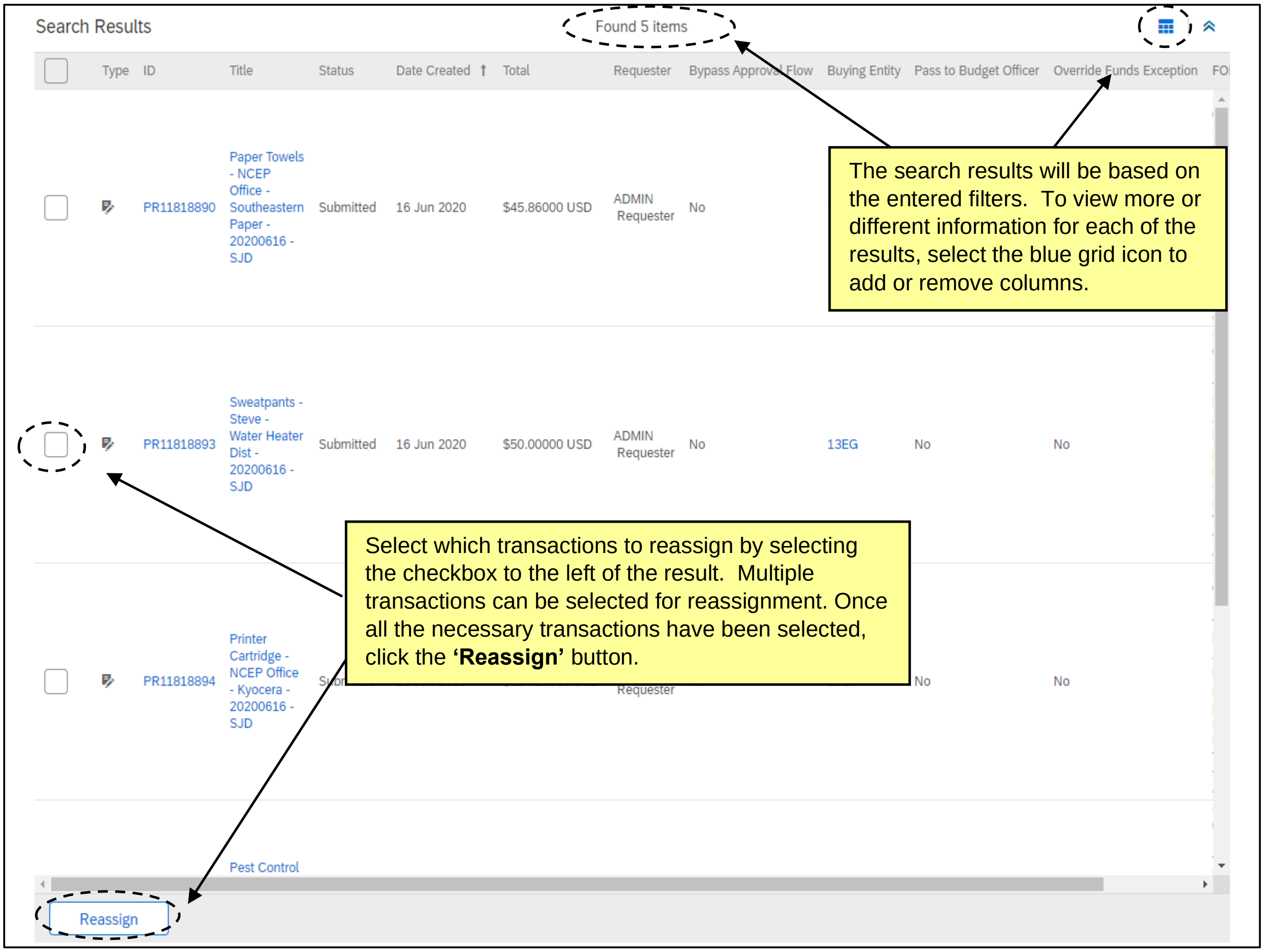
8. After filtering as necessary, click the blue **'Search'** button. This will bring up a list of results below.

9. To add additional columns to the results table, click the blue grid icon at the top right of the search results.

   Note: The blue grid icon will also allow the results to be exported into a Microsoft Excel file.

10. Select the requisitions to reassign using the checkboxes to the left of the Purchase Requisition results.

    Note: Multiple requisitions can be reassigned at once.



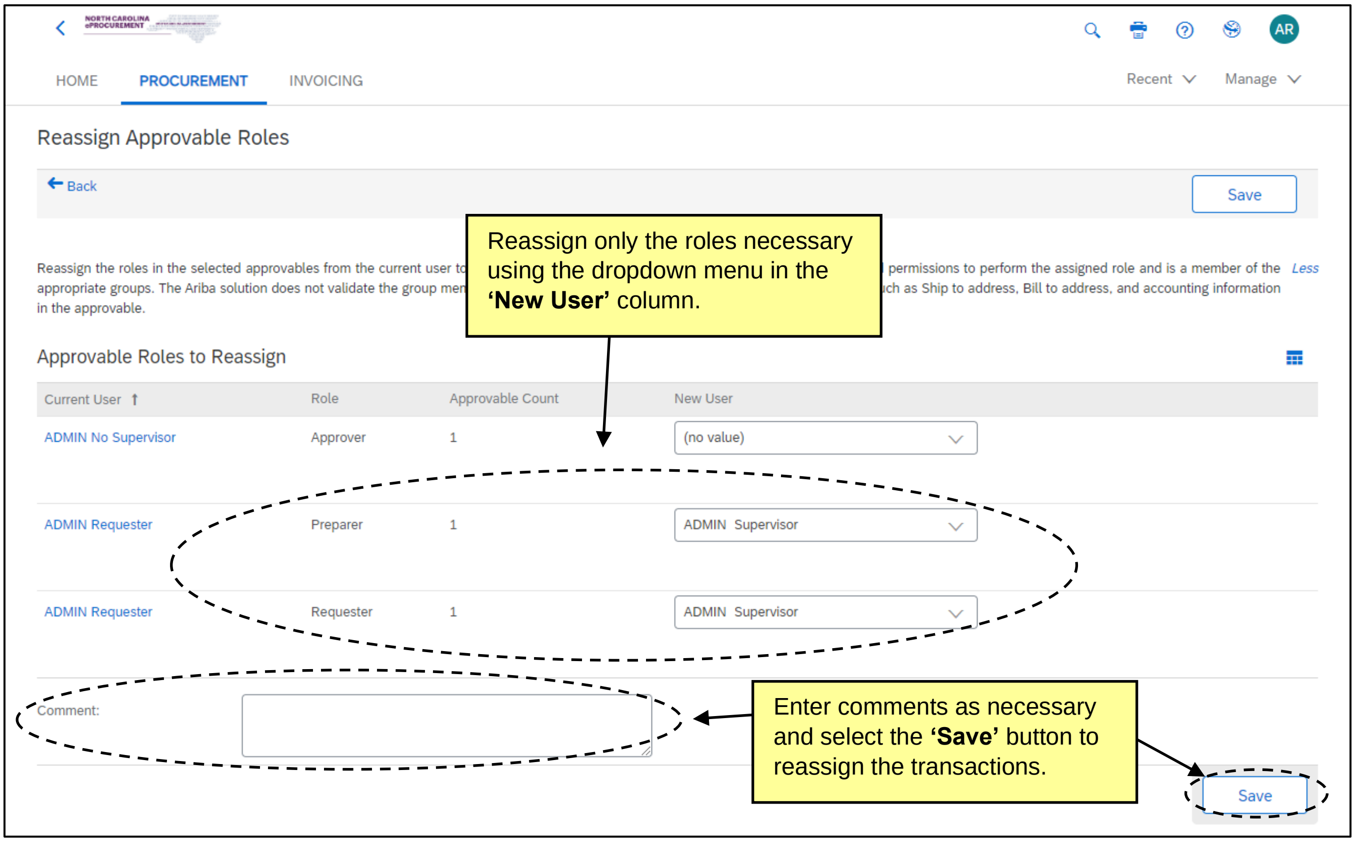
11. Clicking the **'Reassign'** button will display the **'Approvable Roles to Reassign'** page.

12. Based on the transactions selected, all approvable roles that can be reassigned will populate on the **'Approvable Roles to Reassign'** page, including the approver of the transaction(s).

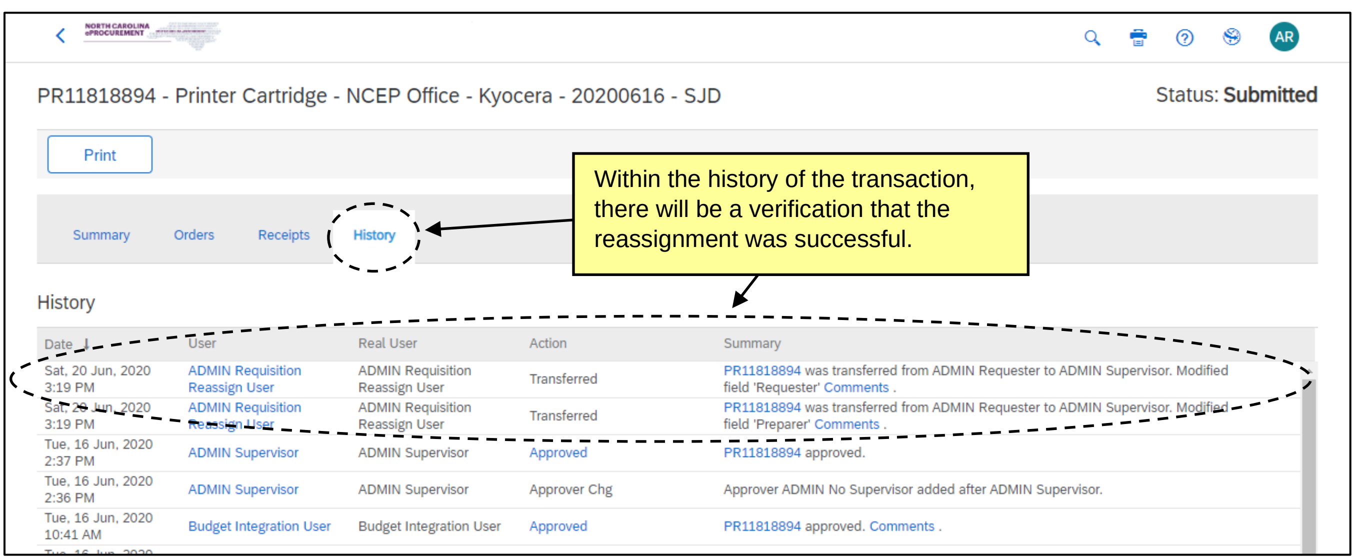
13. Reassign the necessary roles by selecting the drop down menu under the **'New User'** column and searching for the new user who will take over that assignment (e.g. the new Requester or new Preparer).

    Notes:
    - System Administrators cannot reassign roles outside of their entity. System Administrators will be able to see and select users from outside their entity using the **'Current User'** filter, but results will not display any approvables to reassign.
    - Only reassign the roles necessary. For example, if John Doe has left the entity and his transactions are being reassigned to Jane Smith, the approver may or may not need to be reassigned as well.

14. Click the **'Save'** button to reassign the roles.



Note: There is no confirmation message to indicate the reassignment process was successful or unsuccessful. Users will be taken back to the **'Approvable Role Assignments'** page with their previous search results. To verify that the transaction has been reassigned, view the transaction summary page and verify the reassignment in the **'History'** tab.



IV. User Maintenance Group Definitions

1. Each user has a unique profile with specific groups that they belong to, which informs what permissions and access that user has within NC eProcurement. The assigned groups are based on upon the individual's job functions and their responsibilities within their entity.

2. Groups determine a user's authority within the system. Each group has a set of permissions associated with it which determine what functionality and information a given user can access within NC eProcurement. Each user must belong to at least one group, however one group often has multiple permissions. Below is a list of available group by entity type and the associated permissions in the group.

3. Groups are divided by entity and should only be selected based on the entity that the user is a part of. In other words, there is an individual **'Purchasing Agent'** group for every entity (DOA Purchasing Agent, DIT Purchasing Agent, DPI Purchasing Agent, etc.).

   Notes:
   - System Administrators will be able to see all available groups. If a System Administrator requests access to a group to which they should not belong (e.g. the purchasing agent group for another State entity), the request will be denied by the NC eProcurement Help Desk.
   - the NC eProcurement Help Desk can provide a list of all current entity users and their Groups if requested.

a. Groups for NCFS State Agencies

Group Name	Group Description
NC NCFS Basic User	• Create requisitions with catalog and non-catalog items • Only see requisitions related to ones they created • Can run reports, add other charges, and update tax information • Create Receipts for orders they created (Desktop receiving)
NC Catalog Only	• Can create requisitions for catalog items only
NC No Supervisor	• Users who belong in this group are allowed to not have any designated supervisor in their User Profile • Users must have a '9999999' management level
NC Purchasing Agent User	• Review and edit requisitions for Collaborative Requisition • Review and edit the requisition approval workflow when they are added as an approver • Access to the bypass approval checkbox
NC Change Cancel PO	• Change and Cancel orders created by other users *Warning: Users in this group may also see an option to 'Force Order' appear. They should not select the 'Force Order' button or the purchase order will need to be recreated*
NC Close PO	• Can close purchase orders
NC Search User	• Ability to search all approvables within their entity
NC Edit Approvable	• Ability to edit requisitions during the approval process without requiring re-approval
NC Tax and Charge Editor	• Ability to edit the taxes and charges in a requisition during the approval process
NC Collaborative Requisition	• Ability to create Collaborative Requisitions (Enable Collaboration)

Group Name	Group Description
NC Collaboration Team	• Ability to accept proposals from suppliers • Ability to end collaboration
NC Global Reporting Role	• Create/edit reporting templates and save them as Public reports for users to run • View reporting data from other entities *Warning: Users in this group may also can see and modify other entities' requisition. Therefore, it is recommended to limit this role to selected users*
Entity Reporting	• View and generate reports that contain data that is restricted to the entities listed as purchasing units
NC Reporting Role	• View and generate reports that contain data that is restricted to what they and their subordinates create
NC Address Maintenance eForm	• Access to the Address Maintenance eForm
NC User Maintenance eForm	• Access to the User Maintenance eForm
NC Requisition Reassignment	• Reassign a requisition from one user to another user of the same type (requester/approver/preparer)
NC Receipt Reassignment	• Reassign a receipt from one user to another user of the same type (requester/approver/preparer)
Central Receiver XXX	• Receive goods/services on behalf of a Central Receiver "Ship To" address in their agency. The NC eProcurement Help Desk must create new Central Receiver "Ship To" Addresses and groups. Central receivers must be assigned the appropriate Group that is mapped to the Central Receiver "Ship To" Address in order to be able to receive on behalf of that address.
NC Receipt Editor	• Edit a receipt that failed import in NCFS
(Entity-Specific Groups)	Dozens of entity-specific groups exist for use within only that entity. To search for them, type the entity abbreviation (ex: ADMN, COMM, AGRI, CADM, DPS, …) • For example, there are unique **'IT Commodity Approver'** groups for the Department of Public Safety, the Department of Insurance, the Department of Administration, etc.

Cross-Entity permissions: to allow a user to access information for any entity across an entity group (such as DHHS, Commerce, Agriculture, State IT Procurement, P&C or DOA Purchasing), mention it to the help desk in the eForm using the Comments section.

List of groups recommended for:

Profile	Groups recommended
Requester	NC NCFS Basic User NC Reporting Role (substitute with Entity Reporting if they should have access to view RQs from other users within the Entity) <u>Optional:</u> NC Collaborative Requisition
Purchasing Agent	NC Purchasing Agent User NC Tax and Charge Editor NC Edit Approvable Entity Reporting Optional: NC Change Cancel PO NC Collaborative Requisition NC Collaboration Team NC No Supervisor NC Receipt Reassignment NC Requisition Reassignment + Any needed entity approval groups*
Approver	NC Edit Approvable (do not include if user should be "Read Only") NC Reporting Role (substitute with Entity Reporting if they should have access to view RQs from other users within the Entity) NC Tax and Charge Editor + Any needed entity approval groups* Option: NC Collaborative Requisition
System Administrator	NC Address Maintenance eForm Entity Reporting NC Receipt Reassignment NC Requisition Reassignment NC User Maintenance eForm

* If the user covers multiple entities, please be sure to specify in the eForms each entity they will cover for each group (including approval groups).

b. Groups for EPLite entities (Community Colleges, School Systems-LEA)

Group Name	Group Description
NC EPLite Basic User	• Create requisitions with catalog and non-catalog items • Only see requisitions related to ones they created • Can run reports, add other charges, and update tax information • For Community College and local school systems (LEAs)
NC Catalog Only	• Can create requisitions for catalog items only
NC No Supervisor	• Users who belong in this group are allowed to have no designated supervisor in their User Profile • Users must have a '9999999' management level
NC Purchasing Agent User	• Review and edit requisitions for Collaborative Requisition • Review and edit the requisition approval workflow when they are added as an approver • Responsible for change/cancel Purchase Order • Access to the bypass approval checkbox
NC Search User	• Ability to search all approvables within their entity
NC Edit Approvable	• Ability to edit requisitions during the approval process without requiring re-approval
NC EPLite Account Code	• Ability to view 'Account Code' field without 'Basic User' role
NC Tax and Charge Editor	• Ability to edit the taxes and charges in a requisition during the approval process
NC Collaborative Requisition	• Ability to create Collaborative Requisitions (Enable Collaboration)
NC Collaboration Team	• Ability to accept proposals from suppliers • Ability to end collaboration
NC Global Reporting Role	• Create/edit reporting templates and save them as Public reports for users to run • View reporting data from other entities *Warning: Users in this group may also can see and modify other entities' requisition. Therefore, it is recommended to limit this role to selected users*
Entity Reporting	• View and generate reports that contain data that is restricted to the entities listed as purchasing units
NC Reporting Role	• Ability to view and generate reports that contain data that is restricted to what they and their subordinates create
NC Administrator	• Has permission to view all requisitions and purchase orders created within their entity • Receives all email notifications resulting from NC eProcurement transactions (successful purchase order confirmations as well as failure to import messages)
NC Address Maintenance eForm	• Access to the Address Maintenance eForm
NC User Maintenance eForm	• Access to the User Maintenance eForm
NC Requisition Reassignment	• Ability to reassign a requisition from one user to another user of the same type (requester/approver/preparer)

Group Name	Group Description
(Entity-Specific Groups)	• Dozens of entity-specific groups exist for use within only that entity. • To assign the “Gatekeeper” role, default approver for requisitions, type the entity abbreviation followed with Purchasing Approver. For example, WAKETECH Purchasing Approver.

List of groups recommended for:

Profile	Groups recommended
Requester	NC EPLite Basic User NC Reporting Role (substitute with Entity Reporting if they should have access to view PRs from other users within the Entity) Optional: NC Collaborative Requisition
Purchasing Agent	NC Purchasing Agent User NC Edit Approvable Entity Reporting NC Search User Optional: NC Collaborative Requisition NC Collaboration Team NC Administrator NC No Supervisor NC Requisition Reassignment NC Accounting User + Any needed entity approval groups*
Approver	NC Edit Approvable (do not include if user should be “Read Only”) NC Reporting Role (substitute with Entity Reporting if they should have access to view PRs from other users within the Entity) NC EPLite Account Code + Any needed entity approval groups* Optional: NC Search User NC Collaborative Requisition
System Administrator	NC Address Maintenance eForm Entity Reporting NC Requisition Reassignment NC User Maintenance eForm Optional: NC No Supervisor

* If the user covers multiple entities, please be sure to specify in the eForms each entity they will cover for each group (including approval groups).

c. Groups for Non-Integrated entities (including DOT, DES, DWS or Office of the Governor, Charter Schools, Local governments)

Group Name	Group Description
NC Non Integrated Basic User	• Create requisitions with catalog and non-catalog items • Only see requisitions related to ones they created • Can run reports, add other charges, and update tax information • For non-integrated entities (local governments/municipalities)
NC Catalog Only	• Can create requisitions for catalog items only
NC No Supervisor	• Users who belong in this group are allowed to have no designated supervisor in their User Profile • Users must have a '9999999' management level
NC Purchasing Agent User	• Review and edit requisitions for Collaborative Requisition • Review and edit the requisition approval workflow when they are added as an approver • Responsible for change/cancel Purchase Order • Access to the bypass approval checkbox
NC Change Cancel PO	• Change and Cancel orders created by other users • *Warning: Users in this group may also see an option to 'Force Order' appear. They should not select the 'Force Order' button or the purchase order will need to be recreated*
NC Search User	• Ability to search all approvables within their entity
NC Edit Approvable	• Ability to edit requisitions during the approval process without requiring re-approval
NC Collaborative Requisition	• Ability to create Collaborative Requisitions (Enable Collaboration)
NC Collaboration Team	• Ability to accept proposals from suppliers • Ability to end collaboration
NC Global Reporting Role	• Create/edit reporting templates and save them as Public reports for users to run • View reporting data from other entities
NC Administrator	• Has permission to view all requisitions and purchase orders created within their entity • Receives all email notifications resulting from NC eProcurement transactions (successful purchase order confirmations as well as failure to import messages)
NC Close PO	• Ability to close purchase orders • **For Division of Employment Security and Division of Workforce Solution only**
NC DOT Basic User	• Ability to create requisitions • **For NC Department of Transportation only**
NC Non Integrated Users	• Ability to see the Legacy Document ID Field
NC Address Maintenance eForm	• Access to the Address Maintenance eForm
NC User Maintenance eForm	• Access to the User Maintenance eForm
NC Accounting Users	• Ability to see the Account Code field

Group Name	Group Description
NC Special Non Integrated Users	• Ability for users to see the Bid Number and OpenBudget (OpenBook) fields in EPLite Realm
NC OpenBook Non Integrated Users	• Ability for users to see the OpenBudget (OpenBook) fields in EPLite Realm
NC Requisition Reassignment	• Ability to reassign a requisition from one user to another user of the same type (requester/approver/preparer)
NC Receipt Reassignment	• Ability to reassign a receipt from one user to another user of the same type (requester/approver/preparer)
NC Global Reporting Role	• Create/edit reporting templates and save them as Public reports for users to run • View reporting data from other entities *Warning: Users in this group may also can see and modify other entities' requisition. Therefore, it is recommended to limit this role to selected users*
Entity Reporting	• View and generate reports that contain data that is restricted to the entities listed as purchasing units
NC Reporting Role	• Ability to view and generate reports that contain data that is restricted to what they and their subordinates create
(Entity-Specific Groups)	• Dozens of entity-specific groups exist for use within only that entity. For example, there are unique **'Purchasing Approver'** groups for Bladen Community College, Central Piedmont Community College, Haywood County Schools, etc.

List of groups recommended for:

Profile	Groups recommended
Requester	NC Non Integrated Basic User NC Reporting Role (substitute with Entity Reporting if they should have access to view PRs from other users within the Entity) <u>Optional:</u> NC Collaborative Requisition
Purchasing Agent	NC Purchasing Agent User NC Edit Approvable Entity Reporting NC Search User Optional: NC Collaborative Requisition NC Collaboration Team NC Administrator NC No Supervisor NC Requisition Reassignment NC Special Non Integrated Users NC Close PO (for entities DES and DWS only) + Any needed entity approval groups*

Approver	NC Edit Approvable (do not include if user should be "Read Only") NC Reporting Role (substitute with Entity Reporting if they should have access to view PRs from other users within the Entity) + Any needed entity approval groups* Optional: NC Collaborative Requisition NC Search User NC Close PO (for entities DES and DWS only)
System Administrator	NC Address Maintenance eForm Entity Reporting NC Requisition Reassignment NC User Maintenance eForm Optional: NC No Supervisor