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-touse 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.

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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.
- 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 <u>https://ncid.nc.gov</u>.



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

User Maintenance eForm - State Agencies	New	Cancel Save	Submit
Add, update, or delete user information.			
Title *			
Add User - John Doe			
Select Maintenance * Add Mode:	V NCID User ID		
Module: * Buying	V NCID Name	UM Ten	
Filling in the 'NCID User ID' and clicking 'Submit' will auto-populate 'NCID Name' and 'Email Address	e the	ncep.test@doa.nc.gov	Find

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.

User Maintenance eForm - S	State Agencies New		Cancel Save Submit
Title *			
Add User - John Doe			
Select Maintenance Mode: * Ad	dd	~	NCID User ID uten1
Module: * Bu	uying	~	Users can be added to multiple groups as
Reference User	Maintenance Job Aid		necessary.
Buying			Groups
Populate information.			Group
Entity [*] 13 - D	Department of Administration 🗙		NC NCAS Basic User (NC NCAS 13 - Department of Administratio Entity Reporting (Entity Reporting) 13 - Department of Administratio
Management Level * 0		~	Z Entry Reporting (Entry Reporting) 13 - Department of Administratio
Supervisor* NCAS	S Supervisor 🗙		Ly Delete row Add row
User Groups * ADN	MN	\sim	Click 'Add row' to add a new group. To delete a group, select the checkbox beside that group and click 'Delete row'.
Ship To Address * 13PT	T x	lay the appro	oval flow by clicking
Bill To Address 13PT	the a	arrow next to	'Approval.'
 Approval C 			Click 'Submit' to send the request
Changes to the form may affect the app	proval process. Click the refresh io	con to see the most	
	NC Help Desk	;	the Help Desk for approval.
			Cancel Save Submit

- 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."

 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.

Buying		Groups		Q	<u>↑</u> <u>↓</u>
Populate information.		'Entity	' is not an edit	able field. http://www.science.com	
Entity*	13 - Department of Administration X	1 NC NCAS Bas	ic User (NC NCAS	13 - Department of Admi	nistratio
Management Level*	0 (~)	2 Entity Reportin	ng (Entity Reporting)	13 - Department of Admi	nistratio
Supervisor *	NCAS Supervisor X	Delete row	Click the do	own arrow to	
User Groups*	ADMN ~	Click 'Add row' to add a new group and click 'Delete row'.		new field values.	le that
Ship To Address *	13PT ×	Click the 'X' to remove	the		
Bill To Address *	13PT ×	current data before cha	anging it.		

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.

Buying	The top search box will find specific groups already on the user's profile.	G	Groups		⊻ ل[۵
Populate inf			-	Group	Entity
	elete a group, check the box next		1	NC NCAS Basic User (NC NCAS	13 - Department of Administratio
	at group and click 'Delete row.'	(✓ 2	Entity Reporting (Entity Reporting)	13 - Department of Administratio
Т	anagement Level O o add a group, click ' Add row' then search r and add a new group in the new row.	ch	3 (Delete row Add row] >

 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.

 Comments No comments have been made. 			To withdraw a request,
Add comments Add	Users may add comments to their request if necessary.	Withdra	click the ' Withdraw ' button at the bottom of the screen.

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**.

User Maintenance eForm - State Agencies New	Cancel Save Submit
Add, update, or delete user information.	
Title *	
Delete User - John Doe	
Select Maintenance Mode: Delete V	NCID User ID uten1
Morale:* Buying ~	NCID Name UM Ten
NCUZ User ID: * uten1	Email Address ncep.test@doa.nc.gov
After selecting 'Delete' from the 'Select Maintenance	Find
Mode' dropdown, specifying a ' Module ,' and entering the NCID, the User Maintenance eForm is ready to submit.	Cancel Save Submit

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.

Add, Update, or Delete an	Address.		
Title:*	Add Address - New Ship To		Reference Address Maintenance Job Aid
Select Maintenance * Mode:	Choose one		
	(None)		Enter a title and choose to 'Add,'
Provide the requested infor	Add		'Delete,' or 'Update' an address from the 'Select Maintenance Mode' dropdown.
> Approval	Update	L	
	Delete	-	
			Cancel Save Submit

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.

Address Maintenance eForm New	Cancel Save	Submit
Add, Update, or Delete an Address.		
Title: * Add Address - New Ship To	Reference Address Maintenance Job Aid	
Select Maintenance Mode: * Add ~]	
Address Unique Name ADMN005		
Provide the requested information.		
Address Name: * Main Office]	
Entity* 13 - Department of Administration ×		
Line 1: * 123 Main Street]	
Line 2:]	
Line 3:	Bequired information for	
City: * Raleigh	Required information for adding an address is	
State: NC V	denoted by an asterisk.	
Postal Code: * 27604]	
Country: US		
Email Address:]	
Phone:		
Fax:]	
URL:]	
ShipTo, BillTo: * ShipTo ~]	

- 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.
- 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.

Address Maintenan	ce eForm New	Cancel Save Submit
Add, Update, or Delete an	Address.	
Title:*	Delete Address - Main Office	Reference Address Maintenance Job Aid
Select Maintenance* Mode:	Delete ~	Addresses selected for deletion can be removed to reset the search by clicking
Address	Main Office ×	the 'X' next to the populated value.
Provide the requested info	rmation.	
Address Unique Name:*	ADMN005	

- 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

- 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.

Address Maintenance eForm New	Ca	incel	Save	Submit
Add, Update, or Delete an Address.				
Title: Update Address - Main Office	Reference Address Mainten	ance Job	Aid	
Select Maintenance Mode: * Update ~				
Address Main Office 🗙				
Provide the requested information.			1	
Address Unique Name: * ADMN005	Required information t an address is denoted an asterisk. Not all fiel	l by		
Address Name: Main Office	are able to be updated			
Entity * 13 - Department of Administration 🗴			•	
Line 1: * 123 Main Street				
Line 2:				
Line 3:				
City: * Raleigh				
State: NC 🗸				
Postal Code: * 27604				
Country: US				
Email Address:				
Phone:				
Fax:				
URL:				
ShipTo, BillTo: * ShipTo 🗸				
> Approval				
	Ca	incel	Save	Submit

- 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.

 Comments No comments have been made. 	iments ments have been made.		
Add comments	Users may add comments to their	the ' Withdraw ' button at the bottom of the screen.	
	request if necessary.	Withdraw	Print

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.

HOME PROCUREMENT	INVOICING		Q 🖶 🕜 🛞 🔊
Requisition V Title Common Actions Manage Bagelue Approvable Role Assignments Report Search Filters More V		Option 1: Click on 'Approvable Role Assignments' in the 'Common Actions' port	Option 2: Click on
Recently Viewed PR11816235 Test PR11814184 Paper Towels PR11813466 Copy of Test PR29 Paper Box Req	V To D D	Date 4 From	*Approvable Role Pts Assignments' under the 'Manage' drop-down 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.

NOPPICARDINA MORECULARANT		Q		0	۲	AR
HOME PROCUREMENT INVOICING	The options under the 'Approvable	1	Rece	nt 🗸	Mana	age 🗸
Approvable Role Assignments (Requisition' and 'Receipt.'						
Search for approvables to reassign from one user to another. You can search based on the one of the search results. Fetry with a smaller date range.		approvables to r	eassign.			Less

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

Contraction PROCUREMENT INVOICING HOME PROCUREMENT INVOICING Approvable Role Assignments Search for approvables to reassign from one user to anothe Note: If you experience delays in retrieving search results, in Approvable Type Requisition ~	The most common method to reassign transactions is to search for transactions filtered by the current owner of the transactions so as to reassign them to another user.	Additional search filters can be added using the 'Search Options' drop- down selector. values. Then select which approvables to reassing Less
Search Filters Current User: ADMIN Requester [se Requisition ID: Date Created: Custom From: Sat, 6 Jun, 202 To: Sat, 20 Jun, 20	Partitioned Commodity Co (any line iter State Supplier (any line iter	m): tus: No Choice
		Search Reset

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

NORTH CAROLINA oPROCUREMENT					Q		0	۲	AR
PR11818894 -	Printer Cartridge -	NCEP Office - Kyo	cera - 20200616 -	SJD			Statu	s: Sul	omitteo
Print Summary History	Orders Receipts	History	there wi	The history of the transaction, Il be a verification that the ament was successful.					
Date	User	Real User	Action	Summary					
Sat, 20 Jun, 2020 3:19 PM	ADMIN Requisition Reassign User	ADMIN Requisition Reassign User	Transferred	PR11818894 was transferred from ADMIN Reques field 'Requester' Comments .	ter to ADMIN	Supervis	sor. Modi	fied	
	Reassign User		Transferred Transferred			· ·			
3:19 PM Sat, 2 0 Jun. 2020	Reassign User ADMIN Requisition	Reassign User ADMIN Requisition		field 'Requester' Comments . PR11818894 was transferred from ADMIN Reques		· ·			
3:19 PM Sat, 2 0 Jun, 2020 3:19 PM Tue, 16 Jun, 2020	Reassign User ADMIN Requisition Reassign User	Reassign User ADMIN Requisition Reassign User	Transferred	field 'Requester' Comments . PR11818894 was transferred from ADMIN Reques field 'Preparer' Comments .	ster to ADMIN	· ·			· · · · · · · · · · · · · · · · · · ·

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.
- 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.
- 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.

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	 Review and edit requisitions for Collaborative Requisition
Agent User	 Review and edit the requisition approval workflow when they are added as an
	approver
	 Access to the bypass approval checkbox
NC Change Cancel	 Change and Cancel orders created by other users
PO	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	 Ability to edit the taxes and charges in a requisition during the approval process
Editor	
NC Collaborative	 Ability to create Collaborative Requisitions (Enable Collaboration)
Requisition	

a. Groups for NCFS State Agencies

Group Name	Group Description
NC Collaboration	 Ability to accept proposals from suppliers
Team	Ability to end collaboration
NC Global	 Create/edit reporting templates and save them as Public reports for users to run
Reporting Role	 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	Access to the Address Maintenance eForm
Maintenance eForm	
NC User	 Access to the User Maintenance eForm
Maintenance eForm	
NC Requisition	 Reassign a requisition from one user to another user of the same type
Reassignment	(requester/approver/preparer)
NC Receipt	 Reassign a receipt from one user to another user of the same type
Reassignment	(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	Dozens of entity-specific groups exist for use within only that entity. To search for them,
Groups)	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)
	Optional:
Purchasing Agent	NC Collaborative Requisition 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	NC Address Maintenance eForm
Administrator	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	 Review and edit requisitions for Collaborative Requisition
User	 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	 Ability to view 'Account Code' field without 'Basic User' role
Code	
NC Tax and Charge	 Ability to edit the taxes and charges in a requisition during the approval process
Editor	
NC Collaborative	 Ability to create Collaborative Requisitions (Enable Collaboration)
Requisition	
NC Collaboration	Ability to accept proposals from suppliers
Team	Ability to end collaboration
NC Global Reporting	 Create/edit reporting templates and save them as Public reports for users to run
Role	View reporting data from other entities
	Warning: Users in this group may also can see and modify other entities' requisition.
Futite Dougating	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
NC Paparting Polo	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	Access to the Address Maintenance eForm
Maintenance eForm	
NC User	 Access to the User Maintenance eForm
Maintenance eForm	
NC Requisition	• Ability to reassign a requisition from one user to another user of the same type
Reassignment	(requester/approver/preparer)

Group Name	Group Description
(Entity-Specific	• Dozens of entity-specific groups exist for use within only that entity.
Groups)	• 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
Ананоман	+ 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*
	Any needed entity approval groups
	Optional:
	NC Search User
	NC Collaborative Requisition
System	NC Address Maintenance eForm
Administrator	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	 Create requisitions with catalog and non-catalog items
Basic User	 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	 Review and edit requisitions for Collaborative Requisition
User	 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	 Ability to create Collaborative Requisitions (Enable Collaboration)
Requisition	
NC Collaboration	 Ability to accept proposals from suppliers
Team	Ability to end collaboration
NC Global Reporting	 Create/edit reporting templates and save them as Public reports for users to run
Role	 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	 Ability to see the Legacy Document ID Field
Users	
NC Address	 Access to the Address Maintenance eForm
Maintenance eForm	
NC User Maintenance	 Access to the User Maintenance eForm
eForm	
NC Accounting Users	Ability to see the Account Code field

Group Name	Group Description
NC Special Non	• Ability for users to see the Bid Number and OpenBudget (OpenBook) fields in EPLite
Integrated Users	Realm
NC OpenBook Non	 Ability for users to see the OpenBudget (OpenBook) fields in EPLite Realm
Integrated Users	
NC Requisition	 Ability to reassign a requisition from one user to another user of the same type
Reassignment	(requester/approver/preparer)
NC Receipt	 Ability to reassign a receipt from one user to another user of the same type
Reassignment	(requester/approver/preparer)
NC Global Reporting	 Create/edit reporting templates and save them as Public reports for users to run
Role	 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	• Dozens of entity-specific groups exist for use within only that entity. For example,
Groups)	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)
	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 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	NC Address Maintenance eForm
Administrator	Entity Reporting
	NC Requisition Reassignment
	NC User Maintenance eForm
	Optional:
	NC No Supervisor