# NC eProcurement
Getting Started

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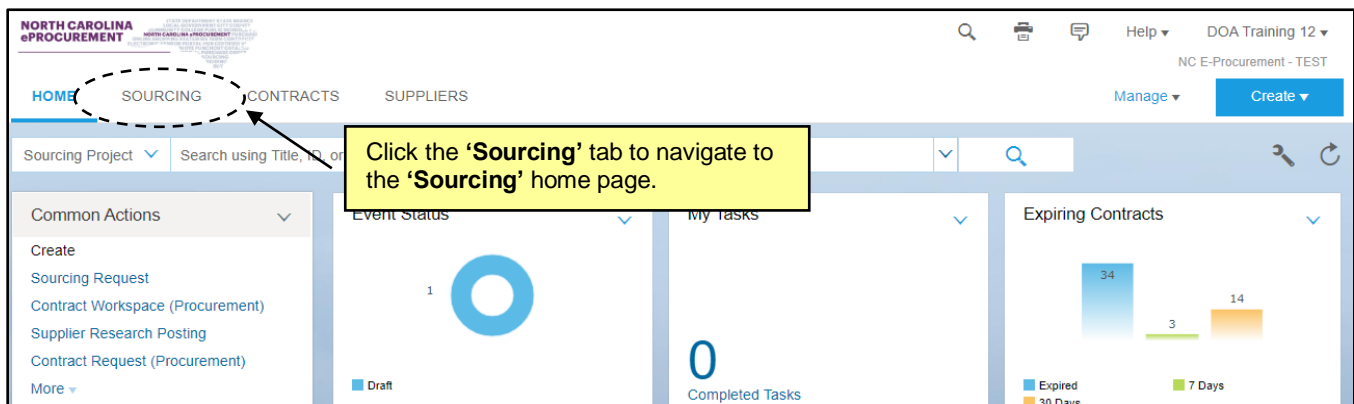
I.   Logging In

To access NC eProcurement Sourcing, users will click the link from the NC eProcurement website, which will direct them to enter NCID credentials.
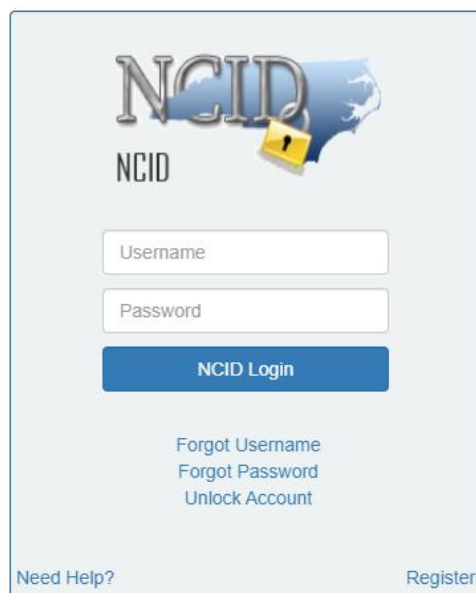
II.   Home Tab

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

1. Click **'Sourcing'** to navigate to the **'Sourcing'** tab.
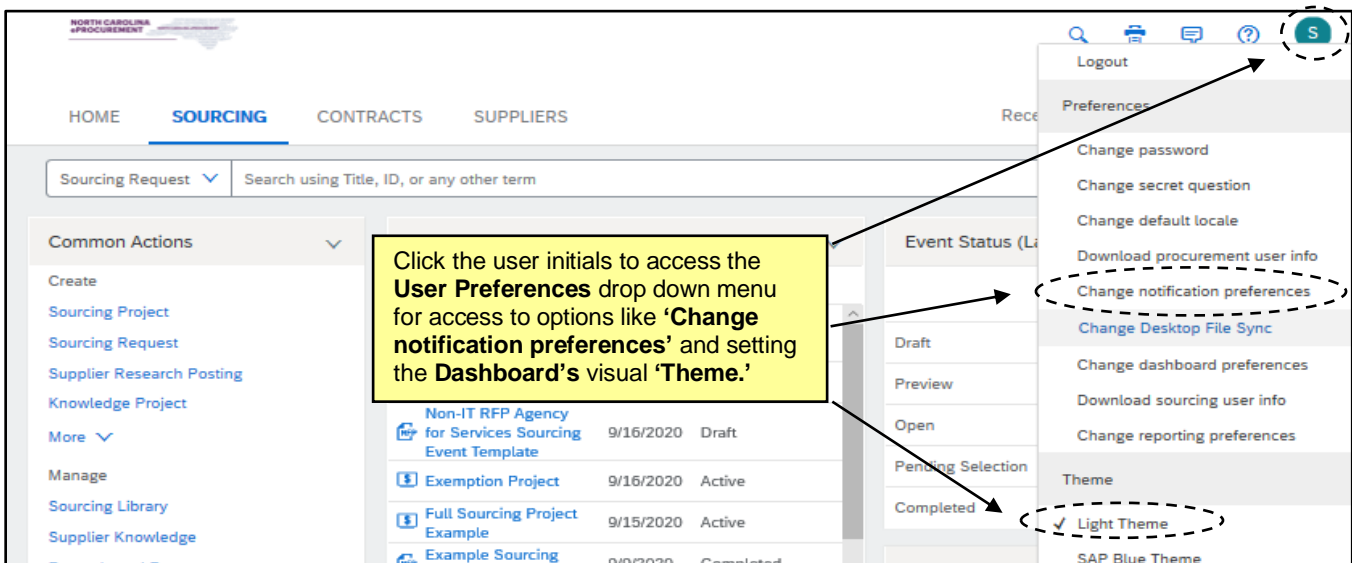
III. Sourcing Tab

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

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

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

   b. **Print:** Click the printer icon to print the current screen.

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

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

Masthead icons.

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

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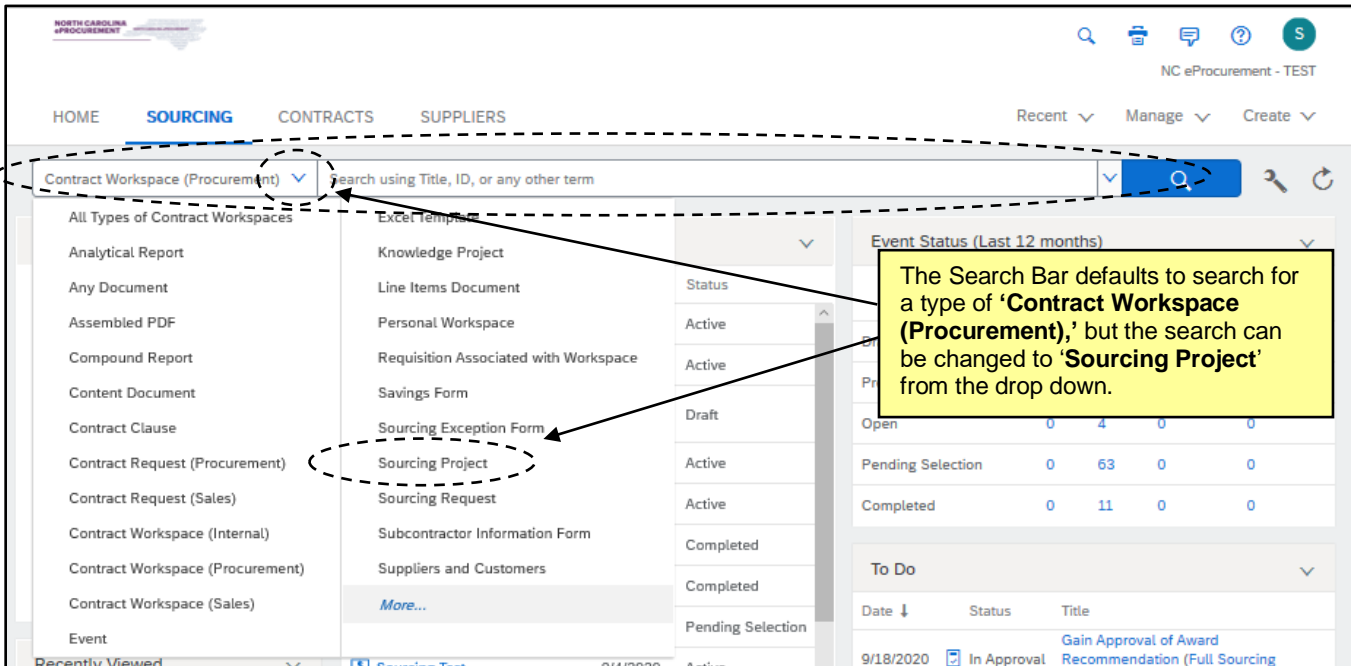

Click the user initials to access the **User Preferences** drop down menu for access to options like **'Change notification preferences'** and setting the **Dashboard's** visual **'Theme.'**

f. **Create:** Click the **'Create'** link for options of items to initiate, including **'Sourcing Project.'**

Click **'Create'** and select **'Sourcing Project'** to begin a Sourcing Project.
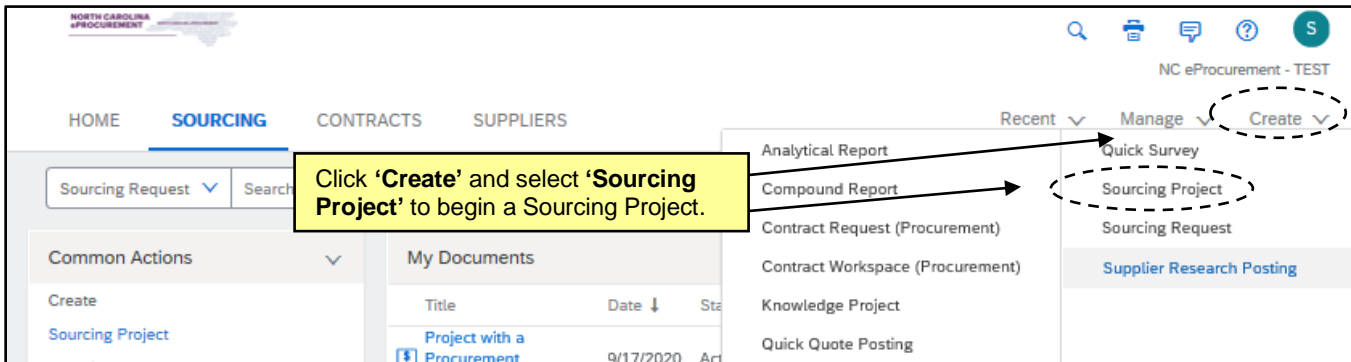
2. **Search Bar:** Use the **Search Bar** to find various items. **'Contract Workspace (Procurement)'** is the default item type, but others can be selected from the **'Project Type'** dropdown, including '**Sourcing Project.'**

The Search Bar defaults to search for a type of **'Contract Workspace (Procurement),'** but the search can be changed to '**Sourcing Project**' from the drop down.

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

   a. **To Do**: The **'To Do'** portlet lists items that require actions by the user. Clicking **'View All'** will display all items, not just the few most recent that display in the portlet. Once **'Tasks'** in the **'To Do'** portlet are completed, they will disappear.

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

c. **Common Actions**: The **'Common Actions'** portlet contains options for items to **'Create'** or **'Manage'** – the same items that are available by clicking those links on the **Masthead**. Clicking **'Sourcing Project'** beneath **'Create'** is the easiest way to initiate a Sourcing Project and clicking on '**Prepackaged Reports'** in the **'Manage'** drop-down is an easy way to access available reports.

d. **Recently Viewed:** The **'Recently Viewed'** portlet displays the five most-recent documents accessed by the user.
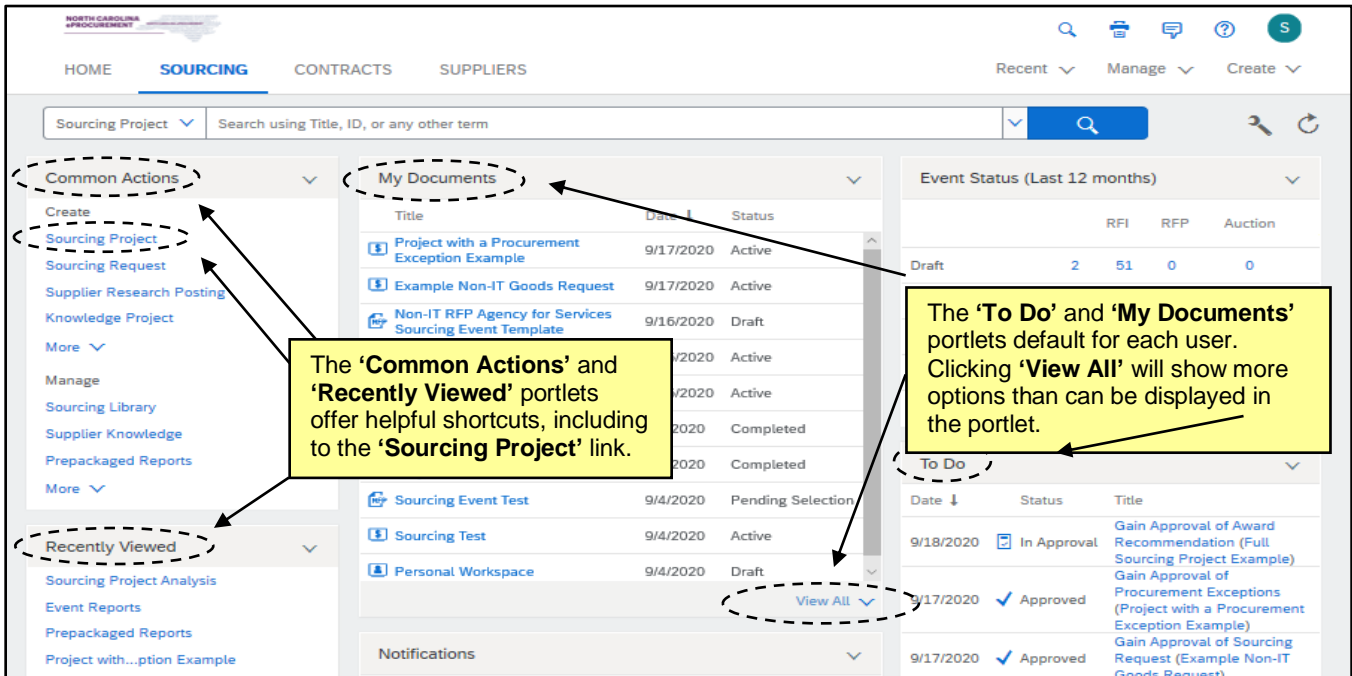
e. **Configure Menu:** The **Dashboard** can be further personalized by clicking on the wrench icon to display the **'Configure Menu.'** A list of options will appear, including those to **'Add Content'** or **'Edit Properties'** on the current tab or to add a completely new tab. It is suggested that users add **'Sourcing Request'** to their **Dashboard** under **'Edit Properties,'** as this content will not display by default.

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