NC E-Procurement Overview

NC E-Procurement is an online purchasing system that can be accessed by users in North Carolina Agencies, Community Colleges, School Systems, and local governments. NC E-Procurement utilizes Ariba Buyer software for purchasing functions.

NC E-Procurement is a user-friendly, Internet-based purchasing system that offers cost savings and an efficient purchasing process to government users. NC E-Procurement is designed to enable users to complete a variety of E-Procurement functions based on an organization's business and job functions. It provides users with a more efficient purchasing process, more purchasing options, and easier access to catalogs, contracts, and reports.

NC E-Procurement Purchasing Lifecycle for **NCAS Agencies**:

1. In the beginning of the NC E-Procurement purchasing lifecycle, an eRequisition is created by the requester and has a status of **'Composing.'**
2. Once the information for the eRequisition has been entered, it is **'Submitted'** for approval and pre-encumbrance.
3. A designated approver(s) reviews the eRequisition. If approval is granted, the eRequisition is sent to NCAS to encumber the funds. A purchase order is then generated in NC E-Procurement and the status is updated to **'Ordered.'**

Note: If the eRequisition is denied or fails pre-encumbrance within NCAS rather than being approved, the status of the eRequisition is set to **'Denied.'**

4. The purchase order is electronically transmitted to the supplier(s) using the preferred ordering method chosen by the vendor in their Vendor Registration account.
5. If the purchase order needs to be edited after it has been updated to **'Ordered'** status, users may create a change order by clicking the **'Change'** button in the purchase order summary.

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

The Purchasing Lifecycle for **Community Colleges** and **School Systems** that initiate requisitions in NC E-Procurement:

1. In the beginning of the NC E-Procurement purchasing lifecycle, an eRequisition is created by the requester and has a status of **'Composing.'**
2. Once the information for the eRequisition has been entered, it is **'Submitted'** for approval.
3. A designated approver(s) reviews the eRequisition. If approval is granted, the eRequisition status changes to **'Approved'** and the eRequisition is sent to the backend financial system for funds checking and further processing.

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

4. The eRequisition/purchase order must be processed in Colleague, ISIS, SunPac, Lawson, or Oracle depending on the specific backend system used by the EP Lite entity. Once complete, the purchase order is automatically transmitted back into NC E-Procurement and is electronically transmitted to the supplier. The purchase order now has a status of **'Ordered.'**

Note: The eRequisition and purchase order are **not linked** within NC E-Procurement. Each transaction will exist separately from one another. This means that change orders and receiving functions are performed in the EP Lite entity's backend system rather than in NC E-Procurement.

I.   Logging into NC E-Procurement @ Your Service

NC E-Procurement is an Internet-based purchasing system and can be accessed by users anywhere there is Internet access.

The URL address for Ariba is **https://buyer.ncgov.com/Ariba**

1. Enter the NCID User ID and password assigned by the North Carolina Identity Management Service (NCID) and click **'Login.'** For more information about using NCID User IDs to access NC E-Procurement, please see the **'Password Reset'** Process Guide.

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

    Note: When logging into NC E-Procurement, users will automatically be taken to the NC E-Procurement Dashboard. Alternatively, users can select a different page to be displayed using the **'Go to'** drop-down menu (e.g., Approval queue).

II.   NC E-Procurement Home Dashboard

The NC E-Procurement Home Dashboard is displayed, unless a different landing page was selected. This page is the starting point for all actions the user is authorized to access. Dashboard pages are easily customized, and depending on the user's customization, a dashboard page might look like the below example. The **Masthead** is the white horizontal area on top of each page. The **NC E-Procurement Dashboard Tabs** can be customized to provide a visual clue into which functional area you are working in. The **Menu Bar** is the blue horizontal bar under the NC E-Procurement Dashboard Tabs.

> **Note:** At any time, users may revert back to the default system settings by selecting '**Revert Tab Set to Default Settings'** under the '**Configure Tabs'** drop-down menu.
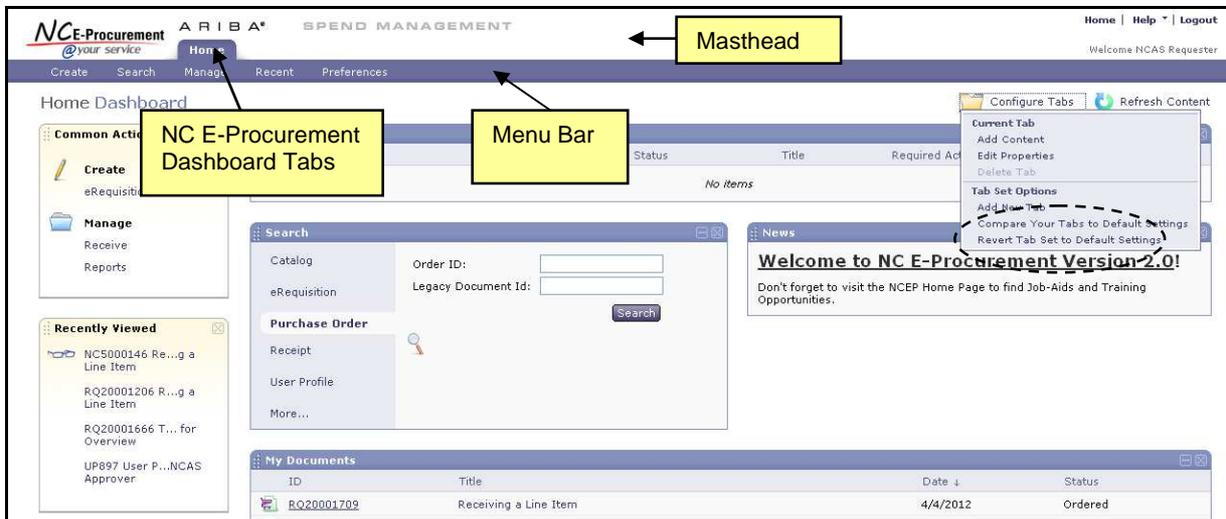
The Masthead contains the following commands: **Home**, **Help**, and **Logout**.

1. **Home:** Return to the NC E-Procurement Dashboard. Users may also click the **'Home'** Dashboard tab itself.
2. **Help:** View NC E-Procurement training documentation on the NC E-Procurement website (http://eprocurement.nc.gov/Training.html).
3. **Logout:** End NC E-Procurement session and exit.
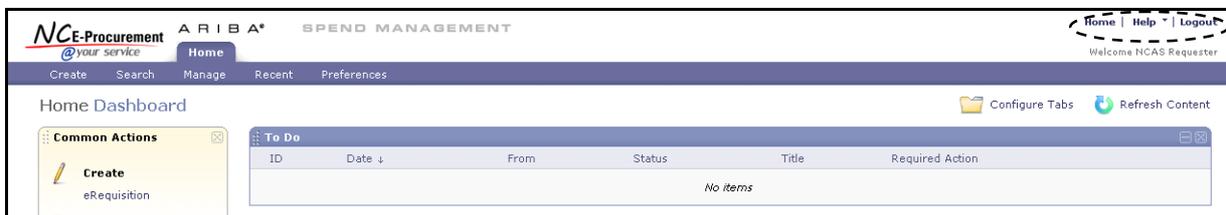
The Menu Bar contains drop-down menus for the user to access information at different phases of the cycle. The following commands are displayed on the Menu Bar: **Create, Search, Manage, Recent,** and **Preferences.**

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

The NC E-Procurement Dashboard contains a number of content items. The content items on the NC E-Procurement Dashboard are customizable depending on a user's preferences, but the following list includes some of the more important features:

1. **Common Actions:** The '**Common Actions**' Portlet displays links to common actions to create and manage documents and provides another option to access a particular function, using the '**Create**' or '**Manage**' links on the Menu Bar.
2. **To Do:** The '**To Do**' Portlet lists the documents that require action. Click the document icon or the document Title to open the documents and act on them. The '**View List…**' link in the lower right corner provides access to all documents by Document Type or Required Action. Click any column header to sort the list by that column's contents (for example, sort by '**Status**'). An arrow in the column header indicates the column by which you are sorting, and whether the sort is ascending or descending.
3. **My Documents:** The '**My Documents**' Portlet displays the most recent documents created. Click the document icon or the document Title to open the document and review and complete the document, if required. The '**View List…**' link in the lower right corner provides access to all documents by Document Type. Click any column header to sort the list by that column's contents (for example, sort by '**Status**'). An arrow in the column header indicates the column by which you are sorting, and whether the sort is ascending or descending.
4. **Recently Viewed:** The '**Recently Viewed**' Portlet displays the five most recent documents accessed either to review or to work on.
5. **Search:** The '**Search**' Portlet allows users to quickly search catalogs or search for documents and access saved searches. The search panel on the left displays common document types, based on the functional area the user is working in; click '**More…**' to display and select other document types to search.
6. **News:** Contains updates sent out by NC E-Procurement.

An arrow in the column header shows the default sort preference that has been chosen by the user.

7. Click **'Configure Tabs'** to customize the NC E-Procurement Dashboard or create new tabs. Select **'Refresh Content'** to force an immediate update of the **'To Do'** and **'My Documents'** Portlets.

III. User Security

Please keep the following points in mind regarding the security of NC E-Procurement:

1. Do not give out password information. The NCID User ID and password serve to identify users. Users are responsible for any action taken in NC E-Procurement on behalf of their user profile.
2. Individual NC E-Procurement sessions terminate after 60 minutes of inactivity. Users will receive an inactivity warning message before the user is logged out of the system. This is for each user's protection. Users must choose to stay logged in or log back into the system if they are automatically logged out.
3. NC E-Procurement is a safe and secure Internet site. It encrypts transactions while they are transmitted through the Internet so that there is no tampering with the data or account information.
4. Using an automatic screen saver with a password lock helps to maintain the security of the workspace.
5. Reports and other printed materials may be confidential. Be sure to maintain the security of any printed documents generated in Ariba.
6. Log out of the system when finished working.
7. NCID will send email reminders to users to change their password every 90 days.
8. Passwords must adhere to NCID requirements. Please visit https://ncid.nc.gov for more information on NCID password requirements.