Address Maintenance eForm

eForms are electronic forms within NC E-Procurement. They allow users with the Security Administrator role to avoid paper processing by directly updating address information in the NC E-Procurement system. eForms are easy-to-use pages accessible from the Shortcut Menu on the Ariba Dashboard. Only Security Administrators, Community College and School System EPLite Administrators, and users with the **'Address eForm'** role have access to eForms.

The Address Maintenance eForm allows the user to add, update, and delete Ship To and Bill To information for their entity. NCAS users will only have the ability to add or edit Ship-To Addresses, and should contact the NC E-Procurement Helpdesk to have new 'Bill To' addresses entered or edited in the NC E-Procurement system.

Note: Community Colleges and School Systems must take additional steps within their financial systems once the address has been added in NC E-Procurement. Please refer to the appropriate 'Mapping User/Address Information' process guide for more information.

1. Click the **'AddressMaintenance'** link from the Common Actions Portlet on the Ariba Dashboard or click **'Create'** on the Menu Mar and then select **'AddressMaintenance.'**.

2. **Title –** Enter a title for the Address Maintenance request (e.g. 'New Ship-To Address – Maintenance Building.'

3. **Select Maintenance Mode –** Select the appropriate type of address maintenance to perform.
   a. **Update:** Users can update existing address information using the update function. Community College and School System users can also view the address Unique ID needed to complete the address mapping by using the update function.
   b. **Add:** Community College and School System users can add new Ship To and/or Bill To information using the add function. NCAS users can add new Ship To addresses using this function.
   c. **Delete:** Users can delete existing address information that is no longer needed in the system.
   d. **Reactivate:** Users can reactivate addresses that were previously deleted. Some School System users may need to reactivate an address if they receive an error message when attempting to add a previously existing Address ID.

Note: For assistance adding, editing, and deleting Bill To addresses, NCAS users will need to contact the NC E-Procurement Helpdesk. NCAS users must add new Bill To addresses in NCAS prior to them being added in NC E-Procurement.

4. Click **'Next.'**

I. Address Maintenance – Add Mode

1. **Entity –** The Entity field will default to the Security Administrator's entity. This field cannot be modified unless the user has cross entity permissions.

2. **Name –** Enter the address name as it should appear in NC E-Procurement.

   Note: For NCAS users, the name field is the 3 digit building code. Community College and School System users may enter the full building or school name in this field.

3. **Address Lines 1-3 –** There are three lines to enter the mailing address information. Users may enter the information as desired. Each line can contain up to 50 characters.

4. **City –** Enter the city name.

5. **State –** Enter **"NC"** for the two digit state abbreviation.

6. **Postal Code** – Enter the zip code of the location. Do not hyphenate the full 9-digit code.

7. **Country** – Use the drop-down menu to choose **'United States.'**

8. **Phone –** Enter the phone number in the following format, XXX-XXX-XXXX.

9. **Email Address, Fax, URL** – Enter the appropriate information related to the location, if desired. These are not required fields.

10. **Ship To, Bill To** – Community College and School System users should select the appropriate address type for the entered address information. This designation cannot be changed once this transaction has been submitted. For NCAS users, this field will default to "Ship To" and will be un-editable.

11. Click **'Next.'**

For NCAS users, the field is automatically set to **'ShipTo'** and is un-editable. Community Colleges and School Systems will have the ability to select the appropriate option.

12. Users can add comments in the **'Comments'** field.

13. Users can add attachments using the **'Add Attachments'** button.

14. Review the information entered for the new address and click **'Submit.'**

Note: Once the Address Maintenance is submitted and all required (if any) approvals are complete, the Address Maintenance will be in **'Actioned'** status.

II. Address Maintenance – Update Mode

1. Set the **'Select Maintenance Mode'** field to **'Update.'**

2. In the **'Address'** drop-down menu locate the address to be updated. If the address is not listed in the drop-down menu, select **'Search for more…'**

3. Locate the address to be updated by typing in the address name in the search box. Users can also search by the street address.

4. Click **'Select'** next to the appropriate address.

5. Make the necessary changes to the address. Any fields that are marked with an asterisk (*) are required and will need to be populated prior to clicking **'Next.'**

Note: The **'Entity'** and **'Ship To, Bill To'** fields cannot be changed. All other fields are editable.

The screenshot contains a yellow note that reads: "Community College and School System users have two additional fields listed on this **Complete Form** page. See below explanation for more details."

Note: Community College and School System users will have an additional field listed beneath the **'Entity'** field. For SunPac, Colleague, and ISIS users, this field is the **'Unique Name'** and contains the information needed to complete the address mapping process in Colleague/SunPac/ISIS. In addition, SunPac users will have a second field listed, **'Address ID'**, that is included in their specific address mapping process. If a SunPac user receives an error message when attempting to add or update an Address ID that was previously deleted, the address will need to be reactivated.

6. Click the **'Next'** button.

7. Verify the changes made to the address.

8. Add comments in the **'Comments'** section of the request if desired.

9. Add attachments to the eForm in the **'Attachments'** section of the request if desired.

10. Click **'Submit.'**

11. The Address Maintenance eForm will be in **'Actioned'** status once all required approvals (if any) are complete.

Note: Address changes are effective immediately after the Address Maintenance eForm is submitted and any required approvals are complete.

III. Address Maintenance – Delete Mode

1. Select **'Delete'** from the **'Select Maintenance Mode'** drop-down menu.

2. Using the **'Address'** drop-down menu, locate the address to be deleted. If the address is not listed in the drop-down menu, select **'Search for more…'** Select the address to be deleted from the pop-up window that appears.

3. Review the address information to be deleted.

4. Click **'Next.'**

5. Add any necessary comments using the **'Comments'** field.

6. Add any necessary attachments using the **'Attachments'** link.

7. On the Summary screen, click **'Submit.'**

8. Once the eForm is submitted and all (if any) required approvals are complete, the Address Maintenance eForm will be in **'Actioned'** status and the address will have been deleted from NC E-Procurement.

IV. Address Maintenance – Reactivate Mode

1. Set the **'Select Maintenance Mode'** field to **'Reactivate.'**

2. In the **'Address'** drop-down menu locate the address to be updated. If the address is not listed in the drop-down menu, select **'Search for more…'**

3. Locate the address to be updated by typing in the address name in the search box. Users can also search by the street address

4. Click **'Select'** next to the appropriate address.

5. The address information cannot be edited during reactivation. Address Maintenance – Update Mode can be used once the address is active.

6. Click **'Next.'**

7. Add any necessary comments using the **'Comments'** field.

8. Add any necessary attachments using the **'Attachments'** link.

9. On the Summary screen, click **'Submit.'**

10. Once the eForm is submitted and all (if any) required approvals are complete, the Address Maintenance eForm will be in **'Actioned'** status and the address will have been reactivated in NC E-Procurement. Any changes that need to be made to the address can be made using the Address Update process.