



## 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.'**

The screenshot displays the NC E-Procurement Ariba dashboard. The top navigation bar includes 'Home', 'Help', and 'Logout'. The main content area is divided into several portlets:

- Menu Mar:** A vertical menu on the left with 'Create', 'Search', and 'Manage' sections. Under 'Create', 'AddressMaintenance' is highlighted with a dashed circle.
- Common Actions:** A portlet with 'Create' and 'Manage' sections. Under 'Create', 'AddressMaintenance' is highlighted with a dashed circle.
- To Do:** A table with columns: ID, Date, From, Status, Title, Required Action. It shows 'No items'.
- Search:** A search box with 'ID:' and a 'Search' button.
- News:** A news portlet with the headline 'Welcome to NC E-Procurement Version 2.0!' and a sub-headline 'Don't forget to visit the NCEP Home Page to find Job-Aids and Training Opportunities.'
- My Documents:** A table with columns: ID, Title, Date, Status. It lists several documents:

ID	Title	Date	Status
US383	Untitled UserMaintenance	3/8/2012	Composing
AD113585	Untitled AddressMaintenance	3/2/2012	Composing
AD113581	Untitled AddressMaintenance	3/1/2012	Composing
US336	Untitled UserMaintenance	3/1/2012	Actioned
US294	Untitled UserMaintenance	2/22/2012	Composing
US293	Untitled UserMaintenance	2/22/2012	Composing



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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.'**

The screenshot displays the 'Address Maintenance eForm' interface. At the top, it shows the 'NC E-Procurement @ your service' logo and 'ARIBA\* SPEND MANAGEMENT'. The user is logged in as 'Welcome NCAS Administrator'. The form is titled 'AD1135101: Untitled AddressMaintenance'. On the left, there is a navigation pane with three steps: 1. Title, 2. Complete Form, and 3. Summary. The main form area has a 'Title' field containing 'Address Maintenance eForm' and a 'Select Maintenance Mode' dropdown menu with options: Update, Add, Delete, and Reactivate. The 'Next' button is highlighted with a dashed circle.



## 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.



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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.’**

Address

AD1135101: Address Maintenance eForm

Provide the requested information.

COMPLETE FORM - ADDRESSMAINTENANCE

Entity: \*41

Name: \*STA

Line 1: \*Ship To Address

Line 2:

Line 3:

City: \*Raleigh

State: \*NC

Postal Code: \*27609

Country: \*United States

Phone: \*888-211-7440

EMail Address:

Fax:

URL:

Ship To, Bill To: ShipTo

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.



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 Security Administration Course  
 Address Maintenance eForm Process Guide

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.'**

**COMMENTS - ENTIRE ADDRESSMAINTENANCE**

Comments:

**ATTACHMENTS - ENTIRE ADDRESSMAINTENANCE**

Add Attachment

Comments and attachments can be added to the entire request from the 'Summary' screen.

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

**AD1135120 - Address Maintenance eForm** Status: Actioned

These are the details of the request you selected. Depending on its status, you can edit, change, copy, cancel, or submit the request for approval. You may also print the details of the request. Review ...

Back Copy

Summary Approval Flow **History**

Date ↓	User	Real User	Action	Summary
Today, 12:32 PM	Ariba System		Actioned	AD1135120 has been actioned.
Today, 12:32 PM	Ariba System		Actioned	AD1135120 has been actioned.
Today, 12:32 PM	NCAS Administrator		Approval not required	AD1135120 required no approval.
Today, 12:32 PM	NCAS Administrator	NCAS Administrator	Submitted	AD1135120 submitted for approval.



## II. Address Maintenance – Update Mode

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

The screenshot shows the NCE-Procurement web application interface. The page title is "AD1135101: Address Maintenance eForm". The "Select Maintenance Mode" dropdown menu is open, showing options: "Select a Value", "Update", "Add", "Delete", and "Recreate". The "Update" option is highlighted. The "Address" field is currently empty.

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...'

The screenshot shows the NCE-Procurement web application interface. The page title is "AD1135101: Address Maintenance eForm". The "Select Maintenance Mode" dropdown menu is set to "Update". The "Address" dropdown menu is open, showing options: "(No value)", "NCAS Ship To", and "Search for more...". The "Search for more..." option is highlighted.



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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.

The screenshot shows the 'Choose Value for Address' dialog box in the NCE-Procurement system. The search field is highlighted with a yellow callout box containing the text: "Type the address name in the search box and click 'Search.'". Below the search field is a table of address entries. The table has columns for Name, Entity, Lines, and City. The first row is "(No value)". The subsequent rows are:

Name	Entity	Lines	City
(No value)			
41PT	41	123 Main St.	Anytown NC United States
Cultural Resources	41	123 Main St.	Anytown NC United States
NCAS Ship To	41	123 Main Street	Anytown NC United States
S01	41	123 Main St.	Anytown NC United States
S01	41	123 Main St.	Anytown NC United States
S01	41	123 Main St.	Anytown NC United States
S01	41	123 Main St.	Anytown NC United States
S01	41	123 Main St.	Anytown NC United States
S01	41	123 Main St.	Anytown NC United States
S01	41	123 Main St.	Anytown NC United States
S01	41	123 Main St.	Anytown NC United States
S01	41	123 Main St.	Anytown NC United States
S01	41	123 Main St.	Anytown NC United States
S01	41	123 Main St.	Anytown NC United States
S01	41	123 Main St.	Anytown NC United States
S01	41	123 Main St.	Anytown NC United States

Each row in the table has a "Select" button to its right. The "Select" button for the row with "S01" and "123 Main St." is circled in red. The interface also includes a "Done" button at the bottom right and navigation buttons ("Prev", "Next", "Exit") on the right side.



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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.

**COMPLETE FORM - ADDRESSMAINTENANCE**

Entity: \*41

Name: \*NCAS Ship To

Line 1: \*123 Main Street

Line 2:

Line 3:

City: \*Anytown

State: \*NC

Postal Code: \*12345

Country: \*United States

Phone: \*888-211-7440

EMail Address:

Fax:

URL:

Ship To, Bill To: ShipTo

Community College and School System users have two additional fields listed on this **Complete Form** page. See below explanation for more details.



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**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.

Address AD1135104: Untitled AddressMaintenance

Provide the requested information.

1 Title  
2 Complete Form  
3 Summary

Entity: \* LDUR  
Address ID: 801  
Unique Name: 801LDUR  
Name: \* Central Regional Acct.  
Line 1: \* 123 Main St.  
Line 2:  
Line 3:  
City: \* Anytown  
State: \* NC  
Postal Code: \* 27609  
Country: \* United States  
Phone: \* 1-336-229-2017  
E-Mail Address:  
Fax:  
URL:  
Ship To, Bill To: ShipTo

'Address ID' for SunPac School Systems.

Next

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.

**NCE-Procurement** ARIBA<sup>®</sup> SPEND MANAGEMENT  
Home | Help | Logout  
Welcome NCAS Administrator

Create Search Manage Recent Preferences

Address AD1135121: Address Maintenance eForm

Review your request, make changes as necessary, and then submit it for approval.

Summary Approval Flow

Title: Address Maintenance eForm  
Select Maintenance Mode: Update  
Address: NCAS Ship To  
My Labels: [Apply Label...](#)

Change	From	To
PostalCode	12345	12346

COMMENTS - ENTIRE ADDRESSMAINTENANCE

Comments:

ATTACHMENTS - ENTIRE ADDRESSMAINTENANCE

[Add Attachment](#)

Previous Submit Exit

Previous Submit Exit

User can add approvers to this request by clicking the **Approval Flow** tab. Address changes do not require approval unless requested by the user.

Comments and attachments can be added to the entire request from the '**Summary**' screen.





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3. Review the address information to be deleted.
4. Click **'Next.'**

AD1135122: Address Maintenance eForm

Provide the requested information.

**COMPLETE FORM - ADDRESSMAINTENANCE**

Entity: \* 41  
Name: \* NCAS Ship To  
Line 1: \* 123 Main Street  
Line 2:  
Line 3:  
City: \* Anytown  
State: \* NC  
Postal Code: \* 12345  
Country: \* United States  
Phone: \* 888-211-7440  
EMail Address:  
Fax:  
URL:  
Ship To, Bill To: ShipTo



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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.'**

AD1135122: Address Maintenance eForm

Review your request, make changes as necessary, and then submit it for approval.

**Summary** | Approval Flow

Title: Address Maintenance eForm  
Select Maintenance Mode: Delete  
Address: NCAS Ship To  
My Labels: [Apply Label...](#)

Change	From	To
Entity	41	
UniqueName	A0j0fy2.ct	
Name	NCAS Ship To	
Line1	123 Main Street	
City	Anytown	
State	NC	
PostalCode	12345	
Country	US	
Phone	888-211-7440	

COMMENTS - ENTIRE ADDRESSMAINTENANCE

Comments:

ATTACHMENTS - ENTIRE ADDRESSMAINTENANCE

[Add Attachment](#)

Comments and attachments can be added to the entire request from the **'Summary'** screen.

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.'

The screenshot shows the 'Address Maintenance eForm' interface. The 'Select Maintenance Mode' dropdown menu is open, displaying the following options: 'Select a Value', 'Update', 'Add', 'Delete', and 'Reactivate'. The 'Reactivate' option is highlighted with a dashed circle. The form also includes fields for 'Title' (Address Maintenance eForm), 'Address', and 'My Labels' (Apply Label). Navigation buttons 'Prev', 'Next', and 'Exit' are visible at the top right and bottom right.

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...'

The screenshot shows the 'Address Maintenance eForm' interface. The 'Select Maintenance Mode' dropdown menu is set to 'Reactivate'. The 'Address' dropdown menu is open, displaying the following options: '(No value)', 'NCAS Ship To', and 'Search for more...'. The 'Search for more...' option is highlighted with a dashed circle. The form also includes fields for 'Title' (Address Maintenance eForm), 'Address', and 'My Labels' (Apply Label). Navigation buttons 'Prev', 'Next', and 'Exit' are visible at the top right and bottom right.





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

6. Click 'Next.'

AD1135122: Address Maintenance eForm

Provide the requested information.

**COMPLETE FORM - ADDRESSMAINTENANCE**

Entity: \*41  
Name: \*NCAS Ship To  
Line 1: \*123 Main Street  
Line 2:  
Line 3:  
City: \*Anytown  
State: \*NC  
Postal Code: \*12345  
Country: \*United States  
Phone: \*888-211-7440  
EMail Address:  
Fax:  
URL:  
Ship To, Bill To: ShipTo



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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.'**

AD1135122: Address Maintenance eForm

Review your request, make changes as necessary, and then submit it for approval.

**Summary** Approval Flow

Title: Address Maintenance eForm  
Select Maintenance Mode: **Reactivate**  
Address: NCAS Ship To  
My Labels: [Apply Label...](#)

Change	From	To
Entity	41	
UniqueName	A0j0fy2.ct	
Name	NCAS Ship To	
Line1	123 Main Street	
City	Anytown	
State	NC	
PostalCode	12345	
Country	US	
Phone	888-211-7440	

COMMENTS - ENTIRE ADDRESSMAINTENANCE

Comments:

ATTACHMENTS - ENTIRE ADDRESSMAINTENANCE

[Add Attachment](#)

Comments and attachments can be added to the entire request from the **'Summary'** screen.

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.