User Maintenance eForm Process Guide

eForms are electronic forms within NC E-Procurement. They allow Security Administrators to avoid paper processing by directly updating user and address information in NC E-Procurement. eForms are easy-to-use pages accessible from the **'Create'** Shortcut Menu. Only Security Administrators, Community College/School System EP Lite Administrators, and users with the **'UserMaintenance eForm'** role have access to User Maintenance eForms. This process guide focuses on the User Maintenance eForm. This eForm allows users to add, update, and delete user information for their entity group.

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

1. Select **'UserMaintenance'** from either the **'Create'** Shortcut Menu on the Menu Bar or the **'Common Actions'** Portlet on the NC E-Procurement Dashboard.

2. **Title –** Enter a title for the User Maintenance request (e.g. 'New User – Jane Doe').

3. **Select Maintenance Mode –** Select the appropriate type of user maintenance to perform.

    a. **Add:** Security Administrators can add a new user using the **'Add'** mode.
    b. **Update:** Security Administrators can update existing user information using the **'Update'** mode. The **'Update'** mode will also be used to apply changes made in NCID to NC E-Procurement.
    c. **Delete:** Security Administrators can delete existing users that are no longer needed in the system using the '**Delete**' mode.
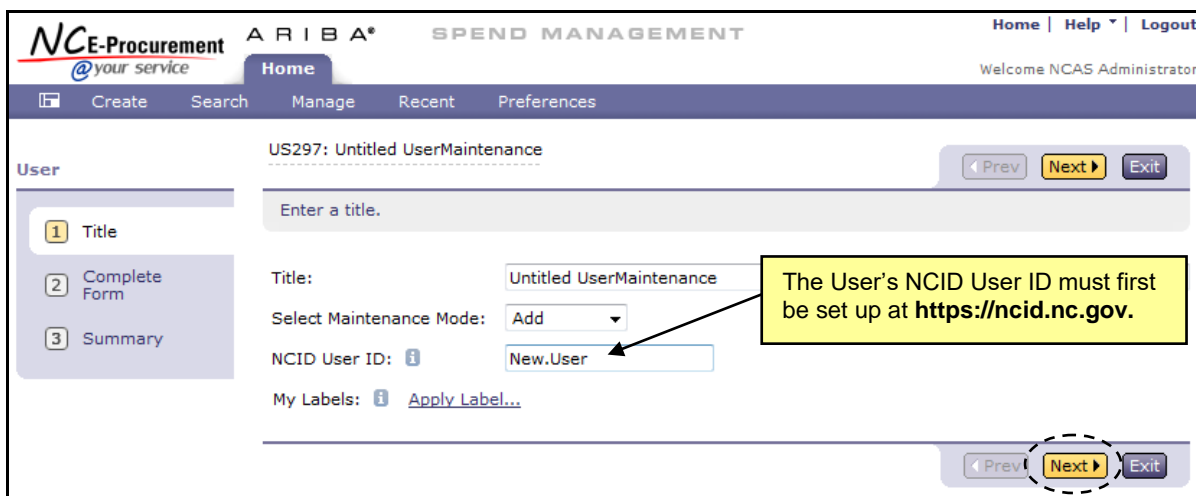
I. User Maintenance – Add Mode

Note: New Users must first have an NCID User ID set up before they may be added to NC E-Procurement. NCID may be accessed by visiting https://ncid.nc.gov.

Note: Users must log into NCID, set security questions, and reset their password within 14 days of the NCID User ID's creation or it will be deleted.

1. Enter the new user's NCID User ID in the **'NCID User ID'** free-text field.

2. Click **'Next.'**

Note: If the new user's NCID User ID is already in the system, an error message will appear. Please contact the NC E-Procurement Help Desk at 888-211-7440, option 1, to determine how to proceed.

3. The **'Complete Form'** page will appear. Enter the required information and click **'Next.'**

4. **Entity –** The **'Entity'** field defaults to the creating user's entity. This field can be modified only if the user has been assigned the 'Cross Entity Purchasing' role.

    Note: The 'Cross Entity Purchasing' role is available only for certain entities.

5. **Name –** The **'Name'** field will automatically populate based on the user's NCID information. This field cannot be modified.

6. **Email Address –** The **'Email Address'** field will automatically populate based on the User's NCID information. This field cannot be modified.

7. **Management Level** – Use the dropdown box to select the appropriate management level. The designated management level is used to determine the user's eRequisition approval flow. See the 'Approval Flows' process guide for more information.

8. **Supervisor** – Select the user's NC E-Procurement supervisor. Depending on the user's management level, the selected supervisor will have to approve eRequisitions entered by this user.
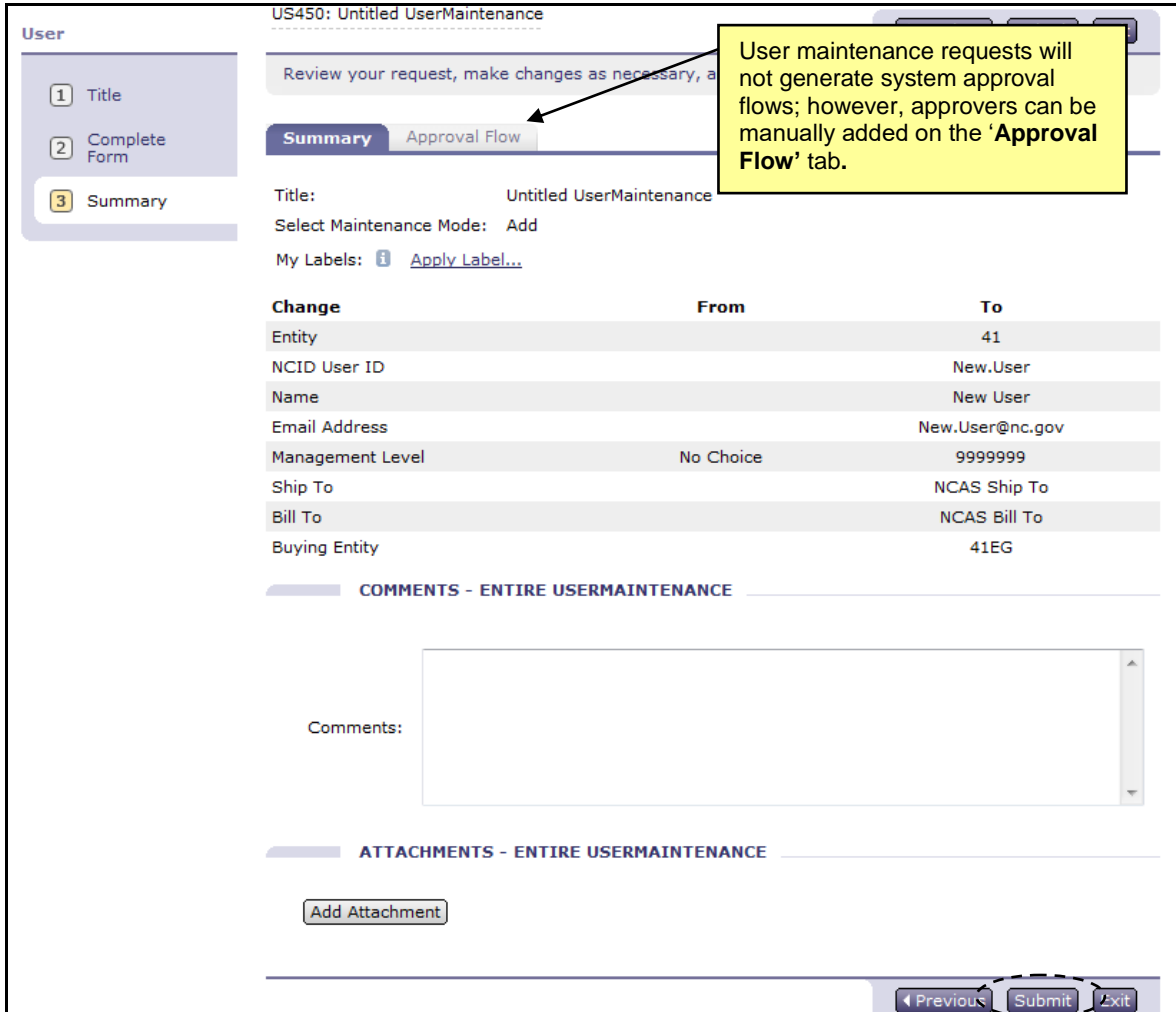
    Note: When a user has an unlimited management level (9999999), a supervisor is not required. The user must also have the **'No Supervisor'** role selected.

9. **Ship To** – Select the default Ship To address specific for this user.

10. **Bill To –** Select the default Bill To address specific to this user.

11. **Buying Entity (NCAS Users Only) –** Select the default Buying Entity specific to this user.

Note: The selected Ship To, Bill To, and Buying Entity will be the values that will default on eRequisitions created by the user. Each of these values may be changed for a specific eRequisition.

12. **User Group –** Select the User Group related to the user. Most entities will only have one available choice. If more than one User Group is available, select the one that applies to the user.

13. **Groups** – Click the link labeled **'Select'** to choose the appropriate groups for each user. Groups are entity-specific tags that are used in setting up entity-specific approval flows related to commodity and funds approvals. Groups will automatically be triggered for addition to approval flows in NC E-Procurement based on established commodity approvals and funds thresholds as set by each agency's leadership and NC E-Procurement. Groups are also used to assign Central Receivers to a specific **'Ship To'** central receiving address. Each group must be assigned to at least one user, and it is suggested that at least two users be assigned to each group. Please consult your agency's purchasing leadership for the specific groups assigned to your agency and their definitions.

14. **Roles –** Click the link labeled **'Select'** to choose the appropriate roles for each user. See the 'Role Definitions' section at the end of this process guide for specific role information.

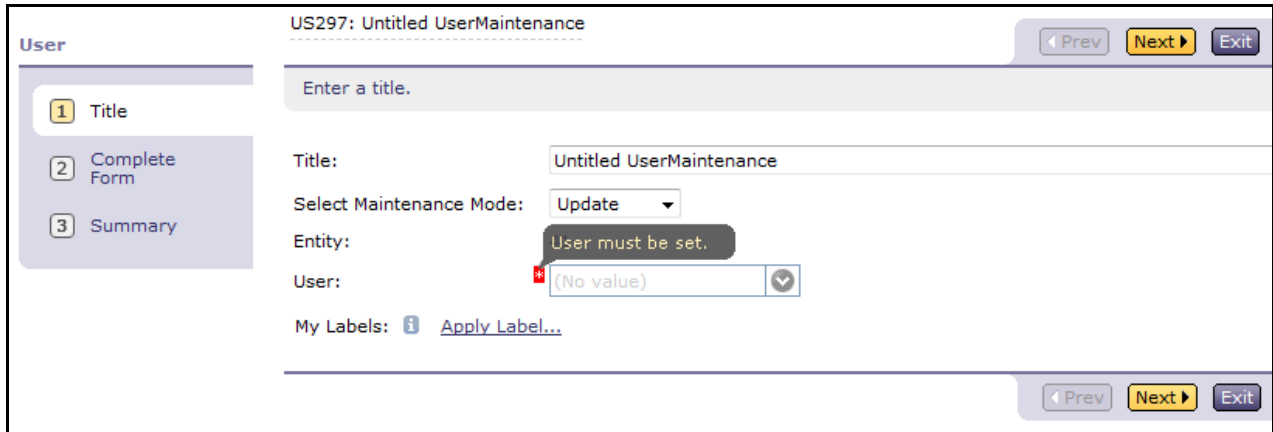15. After completing the required information and clicking **'Next,'** the **'Summary'** page will appear.

16. Review entered information and add any necessary comments and attachments.

17. Click **'Submit.'**

II. User Maintenance – Update Mode

1. After setting the **'Select Maintenance Mode'** drop-down menu to **'Update,'** use the **'User'** drop-down menu to select the name of the user being updated. If the user does not appear in the drop-down menu, select **'Search for more…'** and locate the user through a search in the **'Choose Value for User'** pop-up window that appears.
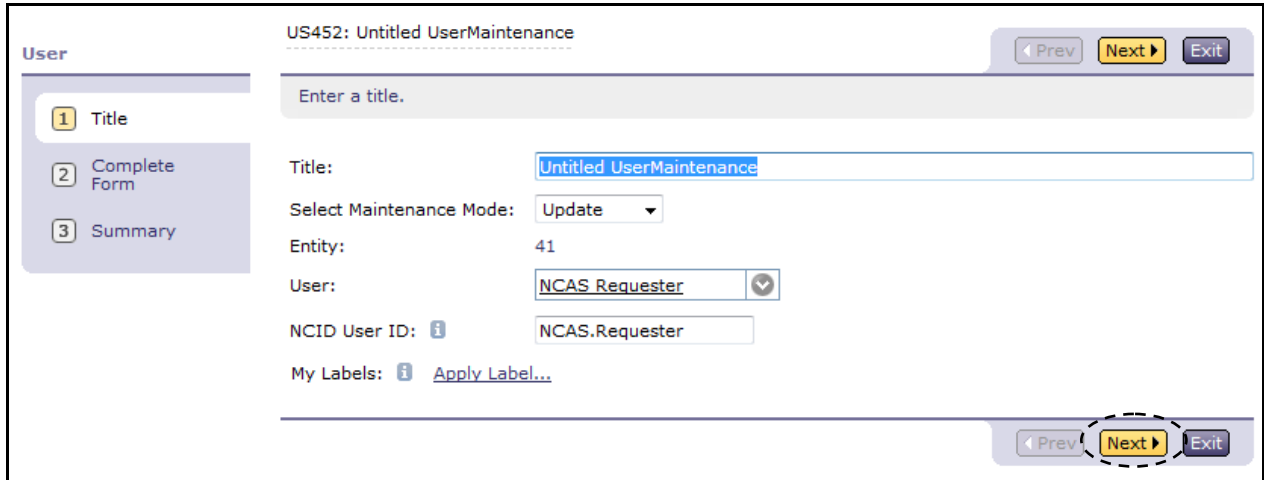

2. Locate the user in the list or use the search field.

3. Click **'Select'** beside the appropriate user.

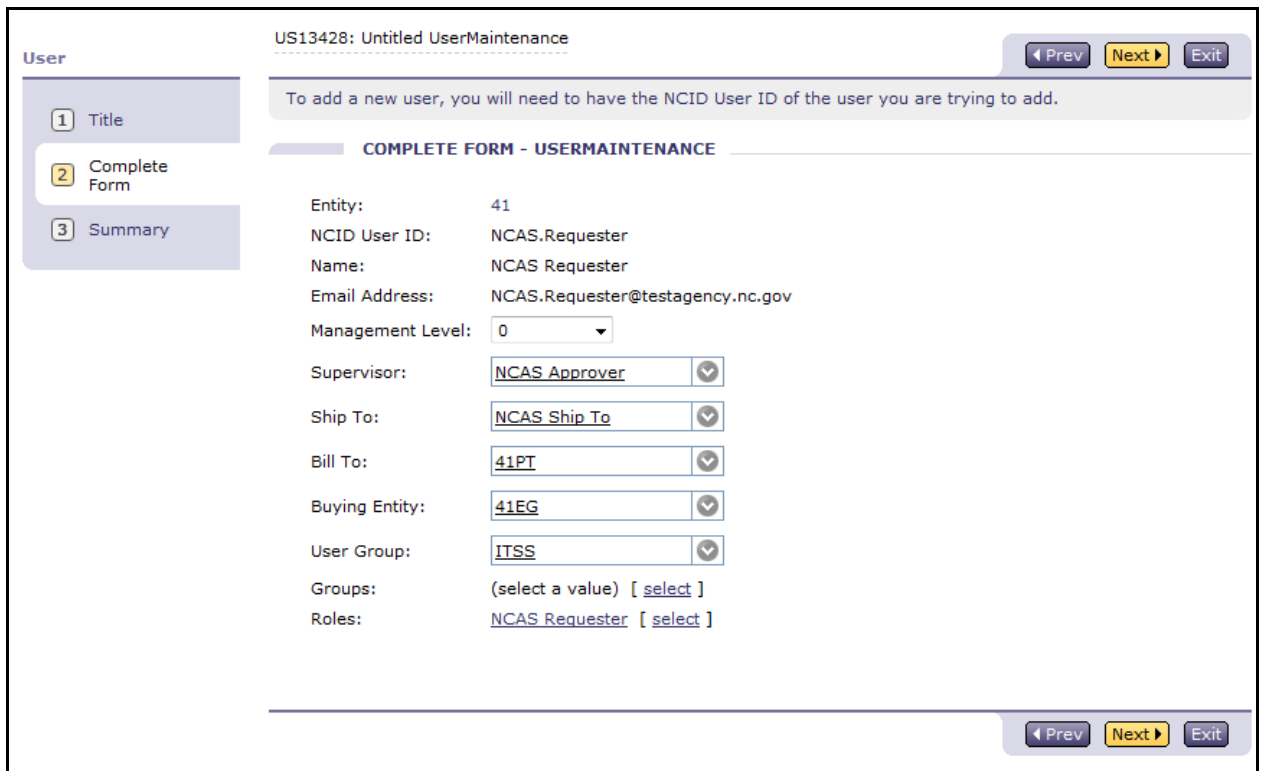4. Once the user is selected, click **'Next.'**

5. Make the necessary changes to the user fields.

Note: The **'Entity'** field **cannot** be modified by the Security Administrator in eForm. If a user's Entity needs to be changed, the user will first need to be deleted by the old entity's Security Administrator. Since the user's NCID User ID will still be in the system, they cannot be added back via eForm. Instead, an 'Edit User' form may be downloaded from the NC E-Procurement web site and submitted to the NC E-Procurement Help Desk to manually add a new user profile under the user's new Entity. The forms may be found at http://eprocurement.nc.gov/Buyer/User_Maintenance.html.

Note: The **'NCID User ID,' 'Name,'** and **'Email Address'** fields **cannot** be modified **in NC E-Procurement**. They have to be modified by the user's Delegated Administrator (DA) in NCID. However, modifications in NCID do not automatically transfer to NC E-Procurement. Once the DA has modified the User's NCID profile, a User Maintenance eForm will then have to be submitted for the user in order to apply the changes to NC E-Procurement.

Note: Though the **'NCID User ID'** can be edited from the **'Title'** page, the eForm cannot be submitted if it has been changed.

6. Click **'Next.'**

7. Review the updated information and click **'Submit.'**

Note: User updates are effective immediately after the request is submitted and all required approvals, if any, are complete.

III. User Maintenance – Delete Mode

1. After setting the **'Select Maintenance Mode'** drop down menu to **'Delete,'** use the '**User'** drop-down menu to locate the user to be deleted. If the User is not listed in the drop-down menu, select **'Search for more…'** and locate the user through a search.

2. Click **'Next.'**

3. Review the User information to be deleted.

4. Click **'Next.'**

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

Note: A User cannot be deleted from NC E-Procurement if the User is the only user within their entity assigned to a specific group or role. The group or role must be reassigned to another user. For example, if Joe Smith is the only one within his agency with the Purchasing Agent role, this role must be assigned to another user before Joe can be deleted.

Note: All transactions created by the user must be in a completed state before the user can be deleted. For NCAS users, all purchase orders must be **'Ordered'** with a quantity of zero, **'Received,'** or **'Canceled.'** For Community College and School System Users, all eRequisitions must be **'Approved'** or **'Ordered.'** 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 NCID.

IV. Role Definitions

Each user has a unique profile with specific roles and permissions associated with it to access NC E-Procurement. The assigned roles are based upon the individual's job functions and responsibilities.

Roles determine a user's authority in the system. Each role has a set of permissions associated with it which determine what functionality and information a given user can access within NC E-Procurement. Each user must have at least one role; however, one role often has several permissions. Below is a list of available roles by entity type and the associated permissions the roles contains.

NCAS Agency Roles:

Address eForm Role: This role gives a user permission to make electronic requests to update address information (additions, removals and updates).

Central Receiver: This role allows a user to receive goods/services in NC E-Procurement on behalf of a Central Receiver Ship To address in their agency. The NC E-Procurement Help Desk must create new Central Receiver Ship To Addresses and Roles to use the Central Receiver role. Central receivers must also 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.

Cross Entity Purchasing: Users with this role are able to access information for any entity within their entity group when performing certain tasks, such as creating an eForm. The 'Cross Entity Purchasing' role is available only for certain entities.

Extended Reporting Role: Users with this role will have access to the 'Order Details Extended' and 'Requisition Detail Extended' reports.

Global Reporting Role: Users with this role will be able to execute searches and reports for all users regardless of entity.

NCAS Editor: An approver with this role will have the permission to edit an eRequisition for which they are in the approval flow.

NCAS Purchasing: Users with this role are Purchasing Agents and have the permission to source purchases on behalf of the agency for which they work. Purchasing Agents also have the ability to edit catalog item information as well as bypass the approval flow on change orders.

NCAS Reporting Role: Users with this role will be able to execute most reports included in NC E-Procurement as well as view all items created within their entity.

NCAS Requester: This role gives an individual the permission to select catalog and non-catalog items for their eRequisition.

NCAS Requester – Catalog Only: This role gives an individual the permission to only select Statewide Term Contract catalog items on an eRequisition. Users with this role do not have permission to add non-catalog items.

No Supervisor: Users who have this role are allowed to have an NC E-Procurement User profile without a designated supervisor. Users with this role must have a '9999999' management level.

Security Administrator: This user will have the ability to add, delete, and update users and addresses for their agency.

User Maintenance eForm: This role gives a user permission to make electronic requests to update only user information (additions, deletions and updates).

Community College/School System Roles:

Address eForm Role: This role gives a user permission to make electronic requests to update address information (additions, removals and updates).

EPLite Administrator: The EP Lite Administrator has the permission to view all purchase orders created by their entity in their **'My Documents'** Portlet. In addition, this individual receives all email notifications resulting from NC E-Procurement transactions (e.g., Successful Purchase Order Confirmations as well as Failure to Import messages). The EP Lite Administrator can also add/update/delete user and address information, as well as create and edit all eRequisition types.

EPLite Editor: An approver with this role will have the permission to edit an eRequisition in which they are in the approval flow.

EPLite Purchasing: Users with this role are Purchasing Agents have the permission to source purchases on behalf of the agency for which they work. Purchasing Agents also have the ability to edit catalog item information.

EPLite Reporting Role: Users with this role will be able to execute most reports included in NC E-Procurement as well as view all items created within their entity.

EPLite Requester: This role gives an individual the permission to select catalog and non-catalog items for their eRequisition.

EPLite Requester – Catalog Only: This role gives an individual the permission to only select Statewide Term Contract catalog items on an eRequisition. Users with this role do not have permission to add non-catalog items.

Extended Reporting Role: Users with this role will have access to the 'Order Details Extended' and 'Requisition Detail Extended' reports.

Global Reporting Role: Users with this role will be able to execute searches and reports for all users regardless of entity.

No Supervisor: Users who have this role are allowed to have an NC E-Procurement user profile without a designated supervisor. Users with this role must have a '9999999' management level.

Security Administrator: This user will have the ability to add, delete, and update users and addresses for their agency.

User Maintenance eForm: This role gives a user permission to make electronic requests to update only user information (additions, deletions and updates).