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.

NCID	
Usemame	
Password	
NCID Login	
Forgot Username Forgot Password Unlock Account	
Need Help?	Register

II. Home Tab

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

1. Click 'Sourcing' to navigate to the 'Sourcing' tab.

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Contract Request (Procurement)	Draft	O Completed Tasks		Expired 30 Days		7 Days

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.

- 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.

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		Masthead icons.		Procurement - TEST
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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.

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Knowledge Project More 🗸		Non-IT RFP Agency for Services Sourcing Event Template	9/16/2020 Draft	Open	Download sourcing user info Change reporting preferences
Manage Sourcing Library		Exemption Project	9/16/2020 Active	Pending Selectio	n Theme
Supplier Knowledge		Example Sourcing	9/9/2020 Completed	To De	SAP Blue Theme

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

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Sourcing Project		Project with a	9/17/2020	Act	Quick Quote Posting			

 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.'

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Any Document	Line Items Document	Status	The Search Bar defaults to search for
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Contract Workspace (Procurement)	Suppliers and Customers		To Do 🗸 🗸
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Event		Pending Selection	Gain Approval of Award
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- 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.

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Recently Viewed	~	Sourcing Test	9/4	/2020	Active	1	9/18/2020	In Approval	Gain Approv Recommend			
Sourcing Project Analysis		Personal Workspace	9/4	/2020	Draft	~			Gain Approv	al of		
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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.

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Supplier Research Posting	'Configure Menu.' To	reset the		Preview	Tab Set Options	
Knowledge Project	'Dashboard' to its origi	nal look, select		Open	Add New Tab	
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