

# System Administrator

## Introduction

System Administrators at each entity can directly update user and address information within NC eProcurement. To do so, System Administrators use electronic forms within the tool called eForms. These eForms are easy-to-use pages accessible from the **Create** shortcut menu. System Administrators are defined by users belonging to the **NC User Maintenance eForm** or **NC Address Maintenance eForm** groups. This process guide will show System Administrators how to conduct User Maintenance, Address Maintenance, and Reassign Transactions between users.



## Learning Objectives

At the end of this job aid, **you will be able to:**



Submit User Maintenance eForms.



Submit Address Maintenance eForms.



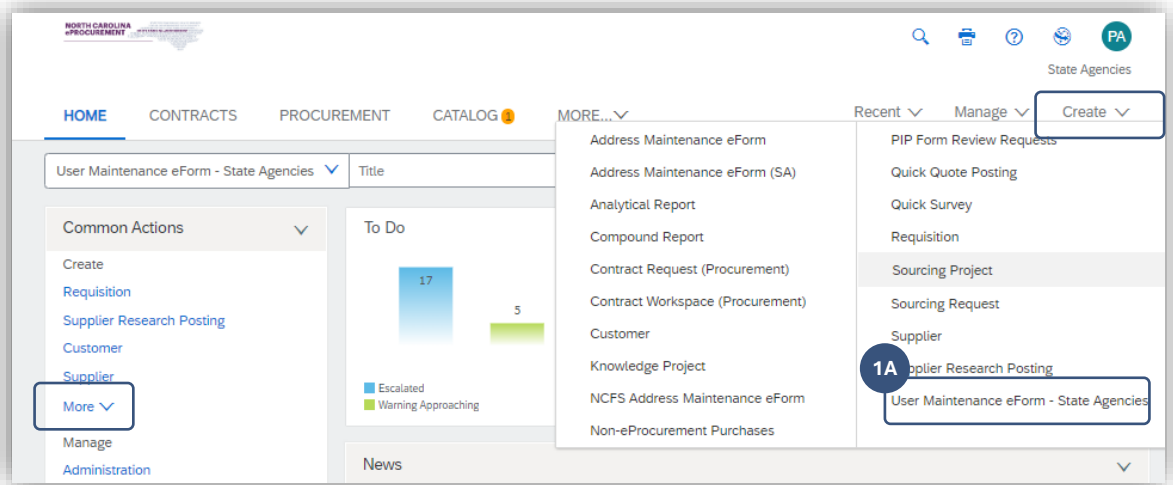
Reassign NC eProcurement transactions.

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## User Maintenance

1 User Maintenance can only be accessed and completed through the Expert View of NC eProcurement. There is no way to access the User Maintenance eForm through the Guided Buying View.

A. To access the User Maintenance eForm, select **User Maintenance eForm – State Agencies** (for NCFS agencies) or **User Maintenance eForm – Public Organizations** (for EPLite entities) from the **Common Actions** portlet or the **Create** menu. This brings up the **User Maintenance eForm** page.



B. Begin by entering a descriptive title for the User Maintenance request (e.g., “Add User – John Doe”).

C. Next, select the action to take by choosing from the **Select Maintenance Mode** dropdown menu. Choices include **Add**, **Update**, or **Delete** a user.

D. Next, select which **Module** the request is for from the dropdown menu. Choices include **Sourcing/Contracts**, **Buying**, or **eProcurement eReporting**.

E. Enter the **NCID User ID** of the user for the action and click the blue **Find** button.



- It may be necessary to click the **Find** button twice.
- Once a User Maintenance request is submitted, the NC eProcurement Help Desk will be notified, and they will review and approve the request before the changes are finalized in the system.
- Users must have an active NCID User ID set up before they can be added, updated, or deleted from NC eProcurement through the User Maintenance eForm.
- An error message of **The NCID user does not exist** indicates the user does not exist in NCID.
- If the NCID is associated to an Individual or Business account, the System Administrator will see an error message stating, **Only a State or Local NCID account may be used with NCEP**. NCID may be accessed by visiting <https://ncid.nc.gov>.

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F. Entering a valid NCID will automatically populate the **NCID Name** and **Email Address** fields

## Adding a User

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A. To add a new user to NC eProcurement, select **Add** on the **Select Maintenance Mode** dropdown on the **User Maintenance eForm** page and select **Buying** from the **Module** dropdown.

B. Enter the NCID of the user for the action and click the blue **Find** button



If the user already exists in NC eProcurement, an error message of “The specified user already exists in the system. Please use the Update operation to complete any modifications” will appear under the **NCID User ID** field.

C. After selecting a valid NCID, populate all relevant fields including the five required fields as noted by an asterisk (\*). All values can be selected via a dropdown menu by clicking the down arrow on the right side of the field.

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- The dropdown arrow can be clicked to open a menu that will display the first 30 entities as well as a message at the bottom of the list that states **Your search results exceed the limit. Change the search criteria to narrow your results.**
- Hovering over a selection from the dropdown will display more information in a box to the right. Clicking on **More info...** at the bottom of that box will display the information in a separate box.
- Selecting **Browse...** at the bottom of the dropdown (or the icon to the right side of the field) will display a larger selection screen with more information.

Populate information.

Entity \* Select

Management Level /All/StateAgencies/01 (01)

Supervisor \* /All/StateAgencies/12 (12)

User Groups /All/StateAgencies/15 (15)

Ship To Address \* /All/StateAgencies/17 (17)

No Rows To Show Entity

13 - Department of Administration

ID 13

Purchasing Unit 13 - Department of Administration

Description Department of Administration

HierarchyPath /All/StateAgencies/ADMIN/13

More info...

Browse...

**D. Entity\*:** This field is for the State Agency, Community College, LEA, or Local Government to which the new user belongs.



A System Administrator may request for a new user to be added to a different entity than their own. This request will result in the NC eProcurement Help Desk manually verifying that the user has Cross-Entity access.

**F. Management Level\*:** The management level field determines the new users PR approval flow.



- A management level of **0** indicates that all Purchase Requisitions for the new user will require supervisor approval. A management level of **9999999** indicates that no supervisor approval is required for Purchase Requisitions.
- When a management level of **9999999** is selected, the user should also be added to the **NC No Supervisor** group.

**G. Supervisor\*:** Select the new users NC eProcurement supervisor. Depending on the users management level, the selected supervisor will have to approve Purchase Requisitions entered by the new user. This field will display options scoped to the Entity.

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A supervisor is only required when the **Module** is **Buying** and the **Management Level** is below 9999999.

**H. User Groups:** This field is for approval flow purposes and auto populates based on the **Entity**.



When **Entity 13 – Department of Administration**, **Entity 08 – Department of Public Instruction**, or **Entity 2B – Division of Public Health** is selected, this field will display as a dropdown and enables users to specify an additional level of hierarchy within the entity (e.g. A user who works for the Office of State Personnel would belong to Entity 13 – Department of Administration with a User Group of **OSPN**.)

**I. Ship To Address\*:** This field sets the default address to which items purchased through NC eProcurement should be shipped.

**J. Bill To Address\*:** This field sets the default address to which invoices associated with NC eProcurement purchases should be sent.

**K. Groups:** Select the appropriate groups to which the new user should belong. Some groups are universal (i.e., NC NCFS Basic User) while others are entity-specific and are preceded by an entity abbreviation (i.e., ADMN IT Approver). Groups are used to determine the permissions and capabilities a user has to take certain actions in the system. Users can be added to multiple groups. See **Section 10 Group Definitions** for a list of groups and their descriptions.



- After selecting a value in the **Group** column, click into the neighboring **Entity** column and assign the newly-added group to the users entity.
- Click **Add row** to add a new group, then click into the box to display search options.

	Group	Entity
<input type="checkbox"/>	NC NCAS Basic User (NC NCAS...	13 - Department of Administratio...
<input type="checkbox"/>	2	

Click 'Add row' to add a new group. To delete a group, select the checkbox beside that group and click 'Delete row'.

**L.** Once all required fields have been populated, the approval flow can be displayed by clicking the arrow to the left of **Approval** at the bottom of the screen. The approval flow will show that the eForm will be routed to the NC eProcurement Help Desk (labeled as **NC Help Desk**) for review and approval.



Users in DHHS entities will see a **DHHS eForm Approver** group before the Help Desk approver.

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M. Click **Submit** to request the creation of the new user.



At any time when creating a User Maintenance eForm, the System Administrator may opt to save the request to submit at a later time by clicking the **Save** button at the bottom of the screen.

**User Maintenance eForm - State Agencies** New Cancel Save Submit

Title \*  
Add User - John Doe

Select Maintenance Mode: \* Add  
Module: \* Buying  
Reference: User Maintenance Job Aid

NCID User ID: uten1  
NCID Name: UM Ten  
Email Address: ncep.test@doa.nc.gov

**Buying**

Populate information.

Entity \* 13 - Department of Administration ✕  
Management Level \* 0  
Supervisor \* NCAS Supervisor ✕  
User Groups \* ADMN  
Ship To Address \* 13PT ✕  
Bill To Address \* 13PT ✕

**Groups**

	Group	Entity
<input type="checkbox"/>	1 NC NCAS Basic User (NC NCAS...	13 - Department of Administratio...
<input type="checkbox"/>	2 Entity Reporting (Entity Reporting)	13 - Department of Administratio...

Delete row Add row

Click 'Add row' to add a new group. To delete a group, select the checkbox beside that group and click 'Delete row'.

Approval

Changes to the form may affect the approval process. Click the refresh icon to see the most current process.

NC Help Desk

Cancel Save Submit **2M**

N. After submitting the eForm, the System Administrator will see a pop-up window verifying that the eForm was successfully submitted and the eForm will be given an ID number.

O. Click **Proceed** to view the request or find it in the **My Documents** portlet in **Submitted** status. At the bottom of the screen, the System Administrator may add comments or withdraw the request. If complete, select the **Exit** button. The Help Desk will either approve the request, which adds the new user to the system immediately, or deny it, at which point the System Administrator can edit and resubmit the request or delete it. Either way, notification will be given via email, and the updated status will display in the **My Documents** portlet.

**Comments**

No comments have been made.

Add comments

Add Maximum 2048 characters

Withdraw Exit Print **20**

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## Updating a User

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- A. To update an existing user in NC eProcurement, select **Update** in the **Select Maintenance Mode** dropdown on the **User Maintenance eForm** and select the **Module** to be updated.
- B. Enter the existing users NCID in the **NCID User ID** field and click **Find**. It may be necessary to click **Find** twice.



If the NCID entered does not exist, the following error message will appear: “The specified user does not exist in the system. Please use the Add operation to add the user.”

- C. The existing users current information will display, including their **Entity, Management Level, Supervisor, User Groups, Ship To Address, Bill To Address, and Groups**. All fields besides **Entity** are editable.



The above information will display only in the **Buying** module. In **Sourcing/Contracts**, only **Entity** and **Groups** appear, and in **eProcurement eReporting**, only **Entity** appears.

- D. Make any desired changes to the editable fields. To change the **Management Level** or **User Groups**, click the down arrow in the search box and select the new value. To change the **Supervisor, Ship To Address, or Bill To Address**, click the **X** to the right of the current value to remove it, then click the down arrow in the search box to select the new value.

- E. To delete a group associated with an existing user, click the checkbox to the left of that group and click the **Delete row** button. To add a group to an existing users profile, click **Add row** and select the desired group from the dropdown, then add the appropriate entity in the column to its right.



The search box above the **Groups** table searches for a specific group within the table below.

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- F. Once all the desired updates have been made, the approval flow can be displayed by clicking the arrow to the left of **Approval** at the bottom of the screen. The approval flow will show that the eForm will be routed to the NC eProcurement Help Desk (labeled as **NC Help Desk**).



Users in DHHS entities will see a **DHHS eForm Approver** group before the Help Desk approver.

- G. Click **Submit** to update the existing users information in the system.



At any time when creating a User Maintenance eForm, the System Administrator may opt to save the request to submit at a later time by clicking the **Save** button at the bottom of the screen.

- H. After submitting the eForm, the System Administrator will see a pop-up window verifying that the eForm was successfully submitted and the eForm will be given an ID number.

- I. Click **Proceed** to view the request or find it in the **My Documents** portlet in **Submitted** status. At the bottom of the screen, the System Administrator may add comments or withdraw the request. If complete, select the **Exit** button. The Help Desk will either approve the request, which updates the user to the system immediately, or deny it, at which point the System Administrator can edit and resubmit the request or delete it. Either way, notification will be given via email, and the updated status will display in the **My Documents** portlet.

The screenshot shows a 'Comments' section with a text input field and an 'Add' button. Below the input field, it says 'Maximum 2048 characters'. To the right of the input field are three buttons: 'Withdraw', 'Exit', and 'Print'. A blue callout bubble with the number '31' is positioned over the 'Exit' button.

## Deleting a User

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- A. To delete an existing user in NC eProcurement, select **Delete** on the **Select Maintenance Mode** dropdown on the User Maintenance eForm page and select the **Module** from which to delete the user.
- B. Enter the existing users NCID in the **NCID User ID** field and click **Find**. It may be necessary to click **Find** twice.



- If the NCID entered does not exist, the following error message will appear: "An unexpected error has occurred. Please contact the NC eProcurement Help Desk for additional assistance."
- If the NCID has already been deactivated by NCDIT, the following error message will appear: "The NCID user has been deactivated." In this case, the user should follow through with deleting the profile.

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- C. Once the existing users NCID and email address populate, the approval flow can be displayed by clicking the arrow to the left of **Approval** at the bottom of the screen. The approval flow will show that the eForm will be routed to the NC eProcurement Help Desk (labeled as **NC Help Desk**).



Users in DHHS entities will see a **DHHS eForm Approver** group before the Help Desk approver.

- D. Click **Submit** to request that the Help Desk delete the existing users information from the system.



All transactions created by the user must be in a completed state before the user can be deleted. For NCFs users, all purchase orders must be **Received**, **Cancelled**, or in **Ordered** status with a quantity of zero. 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 the NCID system. For more information on reassigning transactions from one user to another, see Section 9 Reassigning Transactions.

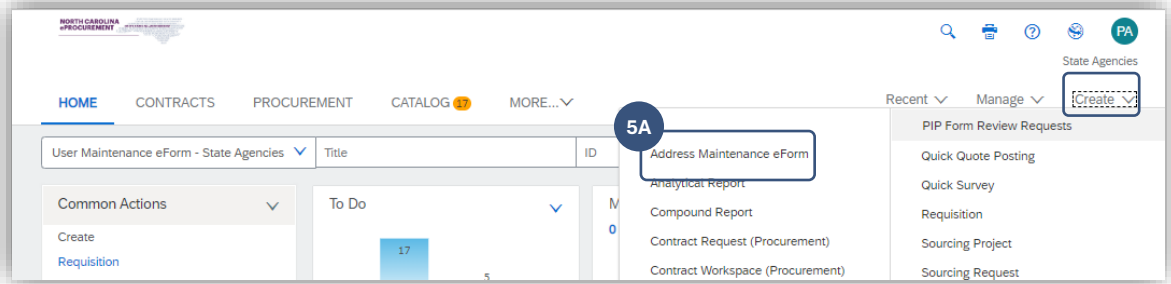
- E. After submitting the eForm, the System Administrator will see a pop-up window verifying that the eForm was successfully submitted and the eForm will be given an ID number.
- F. Click **Proceed** to view the request, or find it in the **My Documents** portlet in **Submitted** status. At the bottom of the screen, the System Administrator may add comments or withdraw the request. If complete, select the **Exit** button. The Help Desk will either approve the request, which removes the user from the system immediately, or deny it, at which point the System Administrator can edit and resubmit the request or delete it. Either way, notification will be given via email, and the updated status will display in the **My Documents** portlet.

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## Address Maintenance

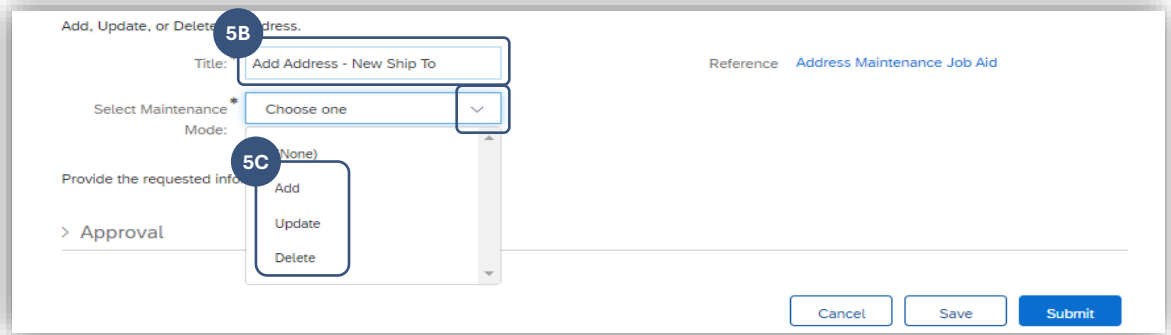
5 Address Maintenance can only be accessed through the Expert View of NC eProcurement. There is no way to access the Address Maintenance eForm through the Guided Buying View.

A. To access the Address Maintenance eForm, select **Address Maintenance eForm** from the **Common Actions** portlet or from the **Create** menu.



B. This brings up the **Address Maintenance eForm** page. Begin by entering a title for the Address Maintenance request (e.g., “Add Address – New Ship To”).

C. Next, select the action to take by choosing from the **Select Maintenance Mode** dropdown menu. The System Administrator can choose to **Add**, **Delete**, or **Update** an address.



## Adding an Address

6 A. To add an address, select **Add** from the **Select Maintenance Mode** dropdown menu on the **Address Maintenance eForm** then provide an **Address Unique Name** and click outside of that field.



- If the **Address Unique Name** already exists in NC eProcurement, an error message of "An unexpected error has occurred. Please contact the NC eProcurement Help Desk for additional assistance" will appear under the **Address Unique Name** field.
- The **Address Unique Name** should NOT contain any spaces.

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B. After entering a valid **Address Unique Name**, additional fields will display below. Populate all relevant fields including the seven required fields as noted by an asterisk (\*). All values can be selected either via a dropdown menu by clicking the down arrow on the right side of the field or by typing into a free text field.

- **Address Name\***: The name of the address will be used in User Profiles and Purchase Requisitions to quickly find the appropriate address (e.g., “Main Office”).
- **Entity\***: The entity to which the address will be added. This field will not default to the System Administrators entity. If an entity is entered in this field that is outside the System Administrators entity, the NC eProcurement Help Desk will manually verify that the System Administrator has cross entity permissions.
- **Line 1\***: The mailing address information for the address being added. Lines 2 and 3 are not required but may be used for additional details.
- **City\***: Enter the city name.
- **State\***: Select **NC** for the two-digit state abbreviation.
- **Postal Code\***: Enter the zip code of the location. Do not hyphenate the full 9-digit code if used.
- **Country**: Defaults to **US**
- **Ship To, Bill To\***: Select from the dropdown menu whether the new address will be a **Ship To** address for goods to be delivered, or a **Bill To** address for invoices.



- Certain local school systems (LEAs) will see an additional field titled, **LEA Address ID** which is a required field for the address mapping process.
- Additional non-required fields are available for System Administrators to add a more detailed address (e.g., Suite 500), an email address, a phone number, a fax number, or a website URL to be associated with the address.

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Address Maintenance eForm New

Cancel Save Submit

Reference [Address Maintenance Job Aid](#)

Add, Update, or Delete an Address.

Title: \* Add Address - New Ship To

Select Maintenance Mode: \* Add

Address Unique Name: \* ADMN005

Provide **6B** *Required information.*

Address Name: \* Main Office

Entity: \* 13 - Department of Administration ✖

Line 1: \* 123 Main Street

Line 2:

Line 3:

**6B**

City: \* Raleigh

State: \* NC

Postal Code: \* 27604

Country: US

Email Address:

Phone:

Fax:

URL:

ShipTo, BillTo: \* ShipTo

- C. Once all the required fields have been populated, the approval flow can be displayed by clicking the arrow to the left of **Approval** at the bottom of the screen. The approval flow will show that the eForm will be routed to the NC eProcurement Help Desk (labeled as **NC Help Desk**).

- D. Click **Submit** to request the new address be added to the system.



At any time when creating an Address Maintenance eForm, the System Administrator may opt to save the request to submit at a later time by clicking the **Save** button at the bottom of the screen.

- E. After submitting the eForm, the System Administrator will see a pop-up window verifying that the eForm was successfully submitted and the eForm will be given an ID number.

- F. Click **Proceed** to view the request, or find it in the **My Documents** portlet in **Submitted** status. At the bottom of the screen, the System Administrator may add comments or withdraw the request. If complete, select the **Exit** button. The Help Desk will either approve the request, which adds the address to the system immediately, or deny it, at which point the System Administrator can edit and resubmit the request or delete it. Either way, notification will be given via email, and the updated status will display in the **My Documents** portlet.

Comments

No comments have been made.

Add comments

Add

Maximum 2048 characters

**6F**

Withdraw Exit Print

## Deleting an Address

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- A. To delete an address, select **Delete** from the **Select Maintenance Mode** dropdown menu on the **Address Maintenance eForm**, then select the address to be deleted from the dropdown menu in the **Address** field.
- B. After selecting a valid address, the **Address** field will populate with the selected address, which can be removed to reset the search by clicking the **X** within the result. The remaining address information will populate below, although no fields will be editable.

The screenshot shows the 'Address Maintenance eForm' interface. At the top right are buttons for 'Cancel', 'Save', and 'Submit'. Below the title 'Address Maintenance eForm' is a 'New' button. The main heading is 'Add, Update, or Delete an Address.' The form contains several fields: 'Title' with the value 'Delete Address - Main Office', 'Reference' with the value 'Address Maintenance Job Aid', 'Select Maintenance Mode' with a dropdown menu set to 'Delete', 'Address' with a dropdown menu set to 'Main Office' and a small 'X' icon next to it, and 'Address Unique Name' with the value 'ADMN005'. A callout box labeled '7B' points to the 'X' icon in the 'Address' field.

- C. At this point the approval flow can be displayed by clicking the arrow to the left of **Approval** at the bottom of the screen. The approval flow will show that the eForm will be routed to the NC eProcurement Help Desk (labeled as **NC Help Desk**).
- D. Click **Submit** to request the address be deleted from the system.



At any time when creating an Address Maintenance eForm, the System Administrator may opt to save the request to submit at a later time by clicking the **Save** button at the bottom of the screen.

- E. After submitting the eForm, the System Administrator will see a pop-up window verifying that the eForm was successfully submitted and the eForm will be given an ID number.
- F. Click **Proceed** to view the request, or find it in the **My Documents** portlet in **Submitted** status. At the bottom of the screen, the System Administrator may add comments or withdraw the request. If complete, select the **Exit** button. The Help Desk will either approve the request, which adds the address to the system immediately, or deny it, at which point the System Administrator can edit and resubmit the request or delete it. Either way, notification will be given via email, and the updated status will display in the **My Documents** portlet.

The screenshot shows the 'Comments' section of the eForm. It features a text input field with the placeholder text 'Add comments' and a character count of 'Maximum 2048 characters'. Below the input field is an 'Add' button. At the bottom right of the section are three buttons: 'Withdraw', 'Exit', and 'Print'.

## Updating an Address

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- A. To update an address, select **Update** from the **Select Maintenance Mode** dropdown menu on the **Address Maintenance eForm**, then select the address to be updated from the dropdown menu in the **Address** field.
- B. After selecting a valid address, the Address field will populate with the selected address, which can be removed to reset the search by clicking the **X** within the result. The remaining address information will populate below, and six of the required fields, as noted by an asterisk (\*), can be edited. Values in these fields can be selected either via a dropdown menu by clicking the down arrow on the right side of the field or by typing into a free text field.



The following fields will not be editable: **Address Unique Name**, **LEA Address ID** (EPLite Only), **Entity**, and **Country**.

- **Address Name\***: The name of the address will be used in User Profiles and Purchase Requisitions to quickly find the appropriate address (e.g., “Main Office”).
- **Line 1\***: The mailing address information for the address being added. Lines 2 and 3 are not required but may be used for additional details.
- **City\***: Enter the city name.
- **State\***: Select NC for the two-digit state abbreviation.
- **Ship To, Bill To\***: Select from the dropdown menu whether the new address will be a Ship To address for goods to be delivered, or a Bill To address for invoices



Additional non-required fields are available for System Administrators to add a more detailed address (e.g., Suite 500), an email address, a phone number, a fax number, or a website URL to be associated with the address. This information will be on the Purchase Orders to provide additional contact information for Vendors to reach out to.

# System Administrator

Address Maintenance eForm New Cancel Save Submit

Add, Update, or Delete an Address.

Title: \*  Reference [Address Maintenance Job Aid](#)

Select Maintenance Mode: \*

Address:

Provide the requested information.

Address Unique Name: \*

**8B** Address Name: \*

Entity: \*

Line 1: \*

Line 2:

Line 3:

**8B** City: \*

State: \*

Postal Code: \*

Country: US

Email Address:

Phone:

Fax:

URL:

ShipTo, BillTo: \*

> Approval Cancel Save Submit

C. Once all the desired updates have been made, the approval flow can be displayed by clicking the arrow to the left of **Approval** at the bottom of the screen. The approval flow will show that the eForm will be routed to the NC eProcurement Help Desk (labeled as **NC Help Desk**).

D. Click **Submit** to update the existing addresses information in the system.

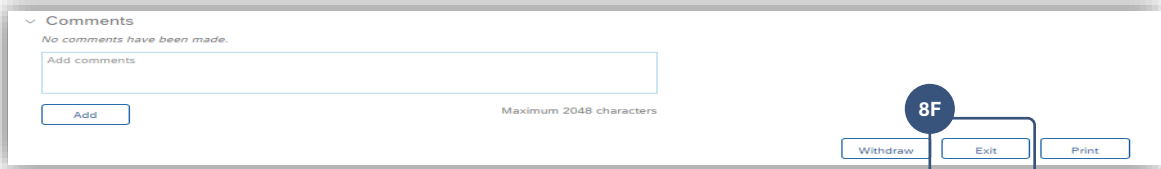


At any time when creating a User Maintenance eForm, the System Administrator may opt to save the request to submit at a later time by clicking the **Save** button at the bottom of the screen.

E. After submitting the eForm, the System Administrator will see a pop-up window verifying that the eForm was successfully submitted and the eForm will be given an ID number.

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- F. Click **Proceed** to view the request, or find it in the **My Documents** portlet in **Submitted** status. At the bottom of the screen, the System Administrator may add comments or withdraw the request. If complete, select the **Exit** button. The Help Desk will either approve the request, which updates the address in the system immediately, or deny it, at which point the System Administrator can edit and resubmit the request or delete it. Either way, notification will be given via email, and the updated status will display in the **My Documents** portlet.



## Reassigning Transactions

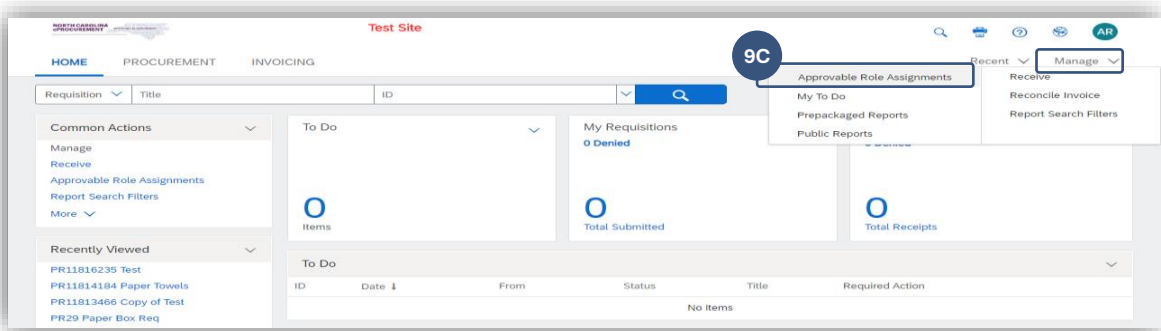
- 9 System Administrators may have the ability to reassign transactions between users. This feature is particularly helpful when users do not close out their open transactions before leaving an entity or changing an entity and the user must be deleted (see **Section 4 Deleting a User**).

- A. There are two groups that a user must have in order to reassign transactions:

- **NC Requisition Reassignment:** Users belonging to this group can reassign Purchase Requisitions between users within their entity.
- **NC Receipt Reassignment (NCFS Only):** Users belonging to this group can reassign Receipts between users within their entity.

- B. To begin reassigning transactions, System Administrators must be in Expert View. There is no option to reassign transactions from the Guided Buying view.

- C. To begin reassigning transactions, select **Approvable Role Assignments** from the **Common Actions** portlet or from the **Manage** menu.



- D. This displays the Approvable Role Assignments page.

- E. If the System Administrator has access to both **NC Requisition Reassignment** and **NC Receipt Reassignment** groups, they must select which Approvable Type will be reassigned.

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The process for reassigning Purchase Requisitions and reassigning Receipts is identical after selecting the Approvable Type from the drop-down.

Search for approvable to reassign from one user to another. You can search based on the currently assigned users or other approvable values. Then select which approvables to reassign. [Less](#)

Note: If you experience delays in retrieving search results, retry with a smaller date range.

Approvable Type: Requisition

F. From this page, System Administrators can search for transactions to reassign using the necessary search filters.

Search for approvables to reassign from one user to another. You can search based on the currently assigned users or other approvable values. Then select which approvables to reassign. [Less](#)

Note: If you experience delays in retrieving search results, retry with a smaller date range.

Approvable Type: Requisition

Search Filters

Current User: ADMIN Requester [select]

Requisition ID:

Date Created: Custom

From: Sat, 6 Jun, 2020

To: Sat, 20 Jun, 2020

Partitioned Commodity Code (any line item): (select a value) [select]

Status: No Choice

Supplier (any line item): (select a value) [select]

Search Reset

G. After filtering as necessary, click the blue **Search** button. This will bring up a list of results below.

H. To add additional columns to the results table, click the blue grid icon at the top right of the search results.



The blue grid icon will also allow the results to be exported into a Microsoft Excel file.

I. Select the requisitions to reassign using the checkboxes to the left of the Purchase Requisition results.



Multiple requisitions can be reassigned at once.

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Search Results Found 5 Items

Type	ID	Title	Status	Date Created	Total	Requester	Bypass Approval Flow	Buying Entity	Pass to Budget Officer	Override Funds Exception
<input type="checkbox"/>	PR11818890	Paper Towels - NCEP Office - Southeastern Paper - 20200616 - SJD	Submitted	16 Jun 2020	\$45.860000 USD	ADMIN Requester	No	13EG	No	No
<input checked="" type="checkbox"/>	PR11818893	Sweatpants - Steve - Water Heater Dist - 20200616 - SJD	Submitted	16 Jun 2020	\$50.000000 USD	ADMIN Requester	No	13EG	No	No
<input type="checkbox"/>	PR11818894	Printer Cartridge - NCEP Office - Kyocera - 20200616 - SJD	Submitted	16 Jun 2020	\$184.180000 USD	ADMIN Requester	No	13EG	No	No
Pest Control										

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Reassign

- J. Clicking the **Reassign** button will display the **Approvable Roles to Reassign** page.
- K. Based on the transactions selected, all approvable roles that can be reassigned will populate on the **Approvable Roles to Reassign** page, including the approver of the transaction(s).
- L. Reassign the necessary roles by selecting the drop down menu under the **New User** column and searching for the new user who will take over that assignment (e.g. the new Requester or new Preparer).



- System Administrators cannot reassign roles outside of their entity. System Administrators will be able to see and select users from outside their entity using the **Current User** filter, but results will not display any approvables to reassign.
- Only reassign the roles necessary. For example, if John Doe has left the entity and his transactions are being reassigned to Jane Smith, the approver may or may not need to be reassigned as well.

# System Administrator

M. Click the **Save** button to reassign the roles.

Reassign Approvable Roles

Reassign the roles in the selected approvables from the current user to a different user. You must ensure that the new user has the required permissions to perform the assigned role and is a member of the appropriate groups. The Ariba solution does not validate the group membership requirements of the new user and does not update details such as Ship to address, Bill to address, and accounting information in the approvable.

Current User	Role	Approvable Count	New User
ADMIN No Supervisor	Approver	1	(no value)
ADMIN Requester	Preparer	1	ADMIN Supervisor
ADMIN Requester	Requester	1	ADMIN Supervisor

Comment:

9M Save



There is no confirmation message to indicate the reassignment process was successful or unsuccessful. Users will be taken back to the **Approvable Role Assignments** page with their previous search results. To verify that the transaction has been reassigned, view the transaction summary page and verify the reassignment in the **History** tab.

PR11818894 - Printer Cartridge - NCEP Office - Kyocera - 20200616 - SJD Status: Submitted

Print

Summary Orders Receipts **History**

Date	User	Real User	Action	Summary
Sat, 20 Jun, 2020 3:19 PM	ADMIN Requisition Reassign User	ADMIN Requisition Reassign User	Transferred	PR11818894 was transferred from ADMIN Requester to ADMIN Supervisor. Modified field 'Requester' Comments .
Sat, 20 Jun, 2020 3:19 PM	ADMIN Requisition Reassign User	ADMIN Requisition Reassign User	Transferred	PR11818894 was transferred from ADMIN Requester to ADMIN Supervisor. Modified field 'Preparer' Comments .
Tue, 16 Jun, 2020 2:37 PM	ADMIN Supervisor	ADMIN Supervisor	Approved	PR11818894 approved.
Tue, 16 Jun, 2020 2:36 PM	ADMIN Supervisor	ADMIN Supervisor	Approver Chg	Approver ADMIN No Supervisor added after ADMIN Supervisor.
Tue, 16 Jun, 2020 10:41 AM	Budget Integration User	Budget Integration User	Approved	PR11818894 approved. Comments .

# System Administrator

## User Maintenance Group Definitions

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- A. Each user has a unique profile with specific groups that they belong to, which informs what permissions and access that user has within NC eProcurement. The assigned groups are based on upon the individuals job functions and their responsibilities within their entity.
- B. Groups determine a users authority within the system. Each group has a set of permissions associated with it which determine what functionality and information a given user can access within NC eProcurement. Each user must belong to at least one group, however one group often has multiple permissions. Below is a list of available group by entity type and the associated permissions in the group.
- C. Groups are divided by entity and should only be selected based on the entity that the user is a part of. In other words, there is an individual **Purchasing Agent** group for every entity (DOA Purchasing Agent, DIT Purchasing Agent, DPI Purchasing Agent, etc.)



System Administrators will be able to see all available groups. If a System Administrator requests access to a group to which they should not belong (e.g. the purchasing agent group for another State entity), the request will be denied by the NC eProcurement Help Desk. The NC eProcurement Help Desk can provide a list of all current entity users and their Groups if requested.

## Groups for NCFS State Agencies

Group Name	Group Description
NC NCFS Basic User	<ul style="list-style-type: none"> <li>• Create requisitions with catalog and non-catalog items</li> <li>• Only see requisitions related to ones they created</li> <li>• Can run reports, add other charges, and update tax information</li> <li>• Create Receipts for orders they created (Desktop receiving)</li> </ul>
NC Catalog Only	<ul style="list-style-type: none"> <li>• Can create requisitions for catalog items only</li> </ul>
NC No Supervisor	<ul style="list-style-type: none"> <li>• Users who belong in this group are allowed to not have any designated supervisor in their User Profile</li> <li>• Users must have a 9999999 management level</li> </ul>
NC Purchasing Agent User	<ul style="list-style-type: none"> <li>• Review and edit requisitions for Collaborative Requisition</li> <li>• Review and edit the requisition approval workflow when they are added as an approver</li> <li>• Access to the bypass approval checkbox</li> </ul>
NC Change Cancel PO	<ul style="list-style-type: none"> <li>• Change and Cancel orders created by other users</li> </ul> <p>Warning: Users in this group may also see an option to Force Order appear. They should not select the Force Order button or the purchase order will need to be recreated</p>
NC Close PO	<ul style="list-style-type: none"> <li>• Can close purchase orders</li> </ul>
NC Search User	<ul style="list-style-type: none"> <li>• Ability to search all approvables within their entity</li> </ul>
NC Edit Approvable	<ul style="list-style-type: none"> <li>• Ability to edit requisitions during the approval process without requiring re-approval</li> </ul>
NC Tax and Charge Editor	<ul style="list-style-type: none"> <li>• Ability to edit the taxes and charges in a requisition during the approval process</li> </ul>
NC Collaborative Requisition	<ul style="list-style-type: none"> <li>• Ability to create Collaborative Requisitions (Enable Collaboration)</li> </ul>

# System Administrator

Group Name	Group Description
NC Collaboration Team	<ul style="list-style-type: none"> <li>Ability to accept proposals from suppliers</li> <li>Ability to end collaboration</li> </ul>
NC Global Reporting Role	<ul style="list-style-type: none"> <li>Create/edit reporting templates and save them as Public reports for users to run</li> <li>View reporting data from other entities</li> </ul> <p>Warning: Users in this group may also can see and modify other entities requisition. Therefore, it is recommended to limit this role to selected users</p>
Entity Reporting	<ul style="list-style-type: none"> <li>View and generate reports that contain data that is restricted to the entities listed as purchasing units</li> </ul>
NC Reporting Role	<ul style="list-style-type: none"> <li>View and generate reports that contain data that is restricted to what they and their subordinates create</li> </ul>
NC Address Maintenance eForm	<ul style="list-style-type: none"> <li>Access to the Address Maintenance eForm</li> </ul>
NC User Maintenance eForm	<ul style="list-style-type: none"> <li>Access to the User Maintenance eForm</li> </ul>
NC Requisition Reassignment	<ul style="list-style-type: none"> <li>Reassign a requisition from one user to another user of the same type (requester/approver/preparer)</li> </ul>
NC Receipt Reassignment	<ul style="list-style-type: none"> <li>Reassign a receipt from one user to another user of the same type (requester/approver/preparer)</li> </ul>
Central Receiver XXX	<ul style="list-style-type: none"> <li>Receive goods/services on behalf of a Central Receiver “Ship To” address in their agency. The NC eProcurement Help Desk must create new Central Receiver “Ship To” Addresses and groups. Central receivers must 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.</li> </ul>
NC Receipt Editor	<ul style="list-style-type: none"> <li>Edit a receipt that failed import in NCFS</li> </ul>
(Entity-Specific Groups)	<p>Dozens of entity-specific groups exist for use within only that entity. To search for them, type the entity abbreviation (ex: ADMN, COMM, AGRI, CADM, DPS, ...)</p> <ul style="list-style-type: none"> <li>For example, there are unique IT Commodity Approver groups for the Department of Public Safety, the Department of Insurance, the Department of Administration, etc.</li> </ul>



**Cross-Entity permissions:** to allow a user to access information for any entity across an entity group (such as DHHS, Commerce, Agriculture, State IT Procurement, P&C or DOA Purchasing), mention it to the help desk in the eForm using the Comments section.

# System Administrator

## List of groups recommended for:

Profile	Groups recommended
Requester	<p>NC NCFS Basic User</p> <p>NC Reporting Role (substitute with Entity Reporting if they should have access to view RQs from other users within the Entity)</p> <p><u>Optional:</u></p> <p>NC Collaborative Requisition</p>
Purchasing Agent	<p>NC Purchasing Agent User</p> <p>NC Tax and Charge Editor</p> <p>NC Edit Approvable</p> <p>Entity Reporting</p> <p><u>Optional:</u></p> <p>NC Change Cancel PO</p> <p>NC Collaborative Requisition</p> <p>NC Collaboration Team</p> <p>NC No Supervisor</p> <p>NC Receipt Reassignment</p> <p>NC Requisition Reassignment</p> <p>+ Any needed entity approval groups*</p>
Approver	<p>NC Edit Approvable (do not include if user should be “Read Only”)</p> <p>NC Reporting Role (substitute with Entity Reporting if they should have access to view RQs from other users within the Entity)</p> <p>NC Tax and Charge Editor</p> <p>+ Any needed entity approval groups*</p> <p><u>Option:</u></p> <p>NC Collaborative Requisition</p>
System Administrator	<p>NC Address Maintenance eForm</p> <p>Entity Reporting</p> <p>NC Receipt Reassignment</p> <p>NC Requisition Reassignment</p> <p>NC User Maintenance eForm</p>



If the user covers multiple entities, please be sure to specify in the eForms each entity they will cover for each group (including approval groups).

# System Administrator

## Groups for EPLite entities (Community Colleges, School Systems-LEA)

Group Name	Group Description
NC EPLite Basic User	<ul style="list-style-type: none"> <li>• Create requisitions with catalog and non-catalog items</li> <li>• Only see requisitions related to ones they created</li> <li>• Can run reports, add other charges, and update tax information</li> <li>• For Community College and local school systems (LEAs)</li> </ul>
NC Catalog Only	<ul style="list-style-type: none"> <li>• Can create requisitions for catalog items only</li> </ul>
NC No Supervisor	<ul style="list-style-type: none"> <li>• Users who belong in this group are allowed to have no designated supervisor in their User Profile</li> <li>• Users must have a 9999999 management level</li> </ul>
NC Purchasing Agent User	<ul style="list-style-type: none"> <li>• Review and edit requisitions for Collaborative Requisition</li> <li>• Review and edit the requisition approval workflow when they are added as an approver</li> <li>• Responsible for change/cancel Purchase Order</li> <li>• Access to the bypass approval checkbox</li> </ul>
NC Search User	<ul style="list-style-type: none"> <li>• Ability to search all approvables within their entity</li> </ul>
NC Edit Approvable	<ul style="list-style-type: none"> <li>• Ability to edit requisitions during the approval process without requiring re-approval</li> </ul>
NC EPLite Account Code	<ul style="list-style-type: none"> <li>• Ability to view Account Code field without Basic User role</li> </ul>
NC Tax and Charge Editor	<ul style="list-style-type: none"> <li>• Ability to edit the taxes and charges in a requisition during the approval process</li> </ul>
NC Collaborative Requisition	<ul style="list-style-type: none"> <li>• Ability to create Collaborative Requisitions (Enable Collaboration)</li> </ul>
NC Collaboration Team	<ul style="list-style-type: none"> <li>• Ability to accept proposals from suppliers</li> <li>• Ability to end collaboration</li> </ul>
NC Global Reporting Role	<ul style="list-style-type: none"> <li>• Create/edit reporting templates and save them as Public reports for users to run</li> <li>• View reporting data from other entities</li> </ul> <p>Warning: Users in this group may also can see and modify other entities requisition. Therefore, it is recommended to limit this role to selected users</p>
Entity Reporting	<ul style="list-style-type: none"> <li>• View and generate reports that contain data that is restricted to the entities listed as purchasing units</li> </ul>
NC Reporting Role	<ul style="list-style-type: none"> <li>• Ability to view and generate reports that contain data that is restricted to what they and their subordinates create</li> </ul>
NC Administrator	<ul style="list-style-type: none"> <li>• Has permission to view all requisitions and purchase orders created within their entity</li> <li>• Receives all email notifications resulting from NC eProcurement transactions (successful purchase order confirmations as well as failure to import messages)</li> </ul>
NC Address Maintenance eForm	<ul style="list-style-type: none"> <li>• Access to the Address Maintenance eForm</li> </ul>
NC User Maintenance eForm	<ul style="list-style-type: none"> <li>• Access to the User Maintenance eForm</li> </ul>
NC Requisition Reassignment	<ul style="list-style-type: none"> <li>• Ability to reassign a requisition from one user to another user of the same type (requester/approver/preparer)</li> </ul>

# System Administrator

## Groups for EPLite entities (Community Colleges, School Systems-LEA)

Group Name	Group Description
(Entity-Specific Groups)	<ul style="list-style-type: none"> <li>Dozens of entity-specific groups exist for use within only that entity.</li> <li>To assign the “Gatekeeper” role, default approver for requisitions, type the entity abbreviation followed with Purchasing Approver. For example, WAKETECH Purchasing Approver.</li> </ul>

### List of groups recommended for:

Profile	Groups recommended
<b>Requester</b>	NC EPLite Basic User  NC Reporting Role (substitute with Entity Reporting if they should have access to view PRs from other users within the Entity)  <u>Optional:</u> NC Collaborative Requisition
<b>Purchasing Agent</b>	NC Purchasing Agent User  NC Edit Approvable  Entity Reporting  NC Search User  <u>Optional:</u>  NC Collaborative Requisition  NC Collaboration Team  NC Administrator  NC No Supervisor  NC Requisition Reassignment  NC Accounting User  + Any needed entity approval groups*
<b>Approver</b>	NC Edit Approvable (do not include if user should be “Read Only”)  NC Reporting Role (substitute with Entity Reporting if they should have access to view PRs from other users within the Entity)  NC EPLite Account Code  + Any needed entity approval groups*  <u>Optional:</u>  NC Search User  NC Collaborative Requisition

# System Administrator

Profile	Groups recommended
System Administrator	NC Address Maintenance eForm Entity Reporting NC Requisition Reassignment NC User Maintenance eForm Optional: NC No Supervisor



If the user covers multiple entities, please be sure to specify in the eForms each entity they will cover for each group (including approval groups).

## Groups for Non-Integrated entities (including DOT, DES, DWS or Office of the Governor, Charter Schools, Local governments)

Group Name	Group Description
NC Non Integrated Basic User	<ul style="list-style-type: none"> <li>Create requisitions with catalog and non-catalog items</li> <li>Only see requisitions related to ones they created</li> <li>Can run reports, add other charges, and update tax information</li> <li>For non-integrated entities (local governments/municipalities)</li> </ul>
NC Catalog Only	<ul style="list-style-type: none"> <li>Can create requisitions for catalog items only</li> </ul>
NC No Supervisor	<ul style="list-style-type: none"> <li>Users who belong in this group are allowed to have no designated supervisor in their User Profile</li> <li>Users must have a 9999999 management level</li> </ul>
NC Purchasing Agent User	<ul style="list-style-type: none"> <li>Review and edit requisitions for Collaborative Requisition</li> <li>Review and edit the requisition approval workflow when they are added as an approver</li> <li>Responsible for change/cancel Purchase Order</li> <li>Access to the bypass approval checkbox</li> </ul>
NC Change Cancel PO	<ul style="list-style-type: none"> <li>Change and Cancel orders created by other users</li> <li>Warning: Users in this group may also see an option to Force Order appear. They should not select the Force Order button or the purchase order will need to be recreated</li> </ul>
NC Search User	<ul style="list-style-type: none"> <li>Ability to search all approvables within their entity</li> </ul>
NC Edit Approvable	<ul style="list-style-type: none"> <li>Ability to edit requisitions during the approval process without requiring re-approval</li> </ul>
NC Collaborative Requisition	<ul style="list-style-type: none"> <li>Ability to create Collaborative Requisitions (Enable Collaboration)</li> </ul>
NC Collaboration Team	<ul style="list-style-type: none"> <li>Ability to accept proposals from suppliers</li> <li>Ability to end collaboration</li> </ul>
NC Global Reporting Role	<ul style="list-style-type: none"> <li>Create/edit reporting templates and save them as Public reports for users to run</li> <li>View reporting data from other entities</li> </ul>

# System Administrator

Group Name	Group Description
NC Administrator	<ul style="list-style-type: none"> <li>Has permission to view all requisitions and purchase orders created within their entity</li> <li>Receives all email notifications resulting from NC eProcurement transactions (successful purchase order confirmations as well as failure to import messages)</li> </ul>
NC Close PO	<ul style="list-style-type: none"> <li>Ability to close purchase orders</li> <li>For Division of Employment Security and Division of Workforce Solution only</li> </ul>
NC DOT Basic User	<ul style="list-style-type: none"> <li>Ability to create requisitions</li> <li>For NC Department of Transportation only</li> </ul>
NC Non Integrated Users	<ul style="list-style-type: none"> <li>Ability to see the Legacy Document ID Field</li> </ul>
NC Address Maintenance eForm	<ul style="list-style-type: none"> <li>Access to the Address Maintenance eForm</li> </ul>
NC User Maintenance eForm	<ul style="list-style-type: none"> <li>Access to the User Maintenance eForm</li> </ul>
NC Accounting Users	<ul style="list-style-type: none"> <li>Ability to see the Account Code field</li> </ul>
NC Special Non Integrated Users	<ul style="list-style-type: none"> <li>Ability for users to see the Bid Number and OpenBudget (OpenBook) fields in EPLite Realm</li> </ul>
NC OpenBook Non Integrated Users	<ul style="list-style-type: none"> <li>Ability for users to see the OpenBudget (OpenBook) fields in EPLite Realm</li> </ul>
NC Requisition Reassignment	<ul style="list-style-type: none"> <li>Ability to reassign a requisition from one user to another user of the same type (requester/approver/preparer)</li> </ul>
NC Receipt Reassignment	<ul style="list-style-type: none"> <li>Ability to reassign a receipt from one user to another user of the same type (requester/approver/preparer)</li> </ul>
NC Global Reporting Role	<ul style="list-style-type: none"> <li>Create/edit reporting templates and save them as Public reports for users to run</li> <li>View reporting data from other entities</li> </ul> <p>Warning: Users in this group may also can see and modify other entities requisition. Therefore, it is recommended to limit this role to selected users</p>
Entity Reporting	<ul style="list-style-type: none"> <li>View and generate reports that contain data that is restricted to the entities listed as purchasing units</li> </ul>
NC Reporting Role	<ul style="list-style-type: none"> <li>Ability to view and generate reports that contain data that is restricted to what they and their subordinates create</li> </ul>
(Entity-Specific Groups)	<ul style="list-style-type: none"> <li>Dozens of entity-specific groups exist for use within only that entity. For example, there are unique Purchasing Approver groups for Bladen Community College, Central Piedmont Community College, Haywood County Schools, etc.</li> </ul>

# System Administrator

## List of groups recommended for:

Profile	Groups recommended
Requester	<p>NC Non Integrated Basic User</p> <p>NC Reporting Role (substitute with Entity Reporting if they should have access to view PRs from other users within the Entity)</p> <p><u>Optional:</u></p> <p>NC Collaborative Requisition</p>
Purchasing Agent	<p>NC Purchasing Agent User</p> <p>NC Edit Approvable</p> <p>Entity Reporting</p> <p>NC Search User</p> <p><u>Optional:</u></p> <p>NC Collaborative Requisition</p> <p>NC Collaboration Team</p> <p>NC Administrator</p> <p>NC No Supervisor</p> <p>NC Requisition Reassignment</p> <p>NC Special Non Integrated Users</p> <p>NC Close PO (for entities DES and DWS only)</p> <p>+ Any needed entity approval groups*</p>
Approver	<p>NC Edit Approvable (do not include if user should be “Read Only”)</p> <p>NC Reporting Role (substitute with Entity Reporting if they should have access to view PRs from other users within the Entity)</p> <p>+ Any needed entity approval groups*</p> <p><u>Optional:</u></p> <p>NC Collaborative Requisition</p> <p>NC Search User</p> <p>NC Close PO (for entities DES and DWS only)</p>

# System Administrator

Profile	Groups recommended
System Administrator	NC Address Maintenance eForm Entity Reporting NC Requisition Reassignment NC User Maintenance eForm <u>Optional:</u> NC No Supervisor