Nothing Compares
NORTH CAROLINA

April 2016

NC E-Procurement
ACCBO Spring Conference

Tips & Tricks

NC E-Procurement Overview & Benefits

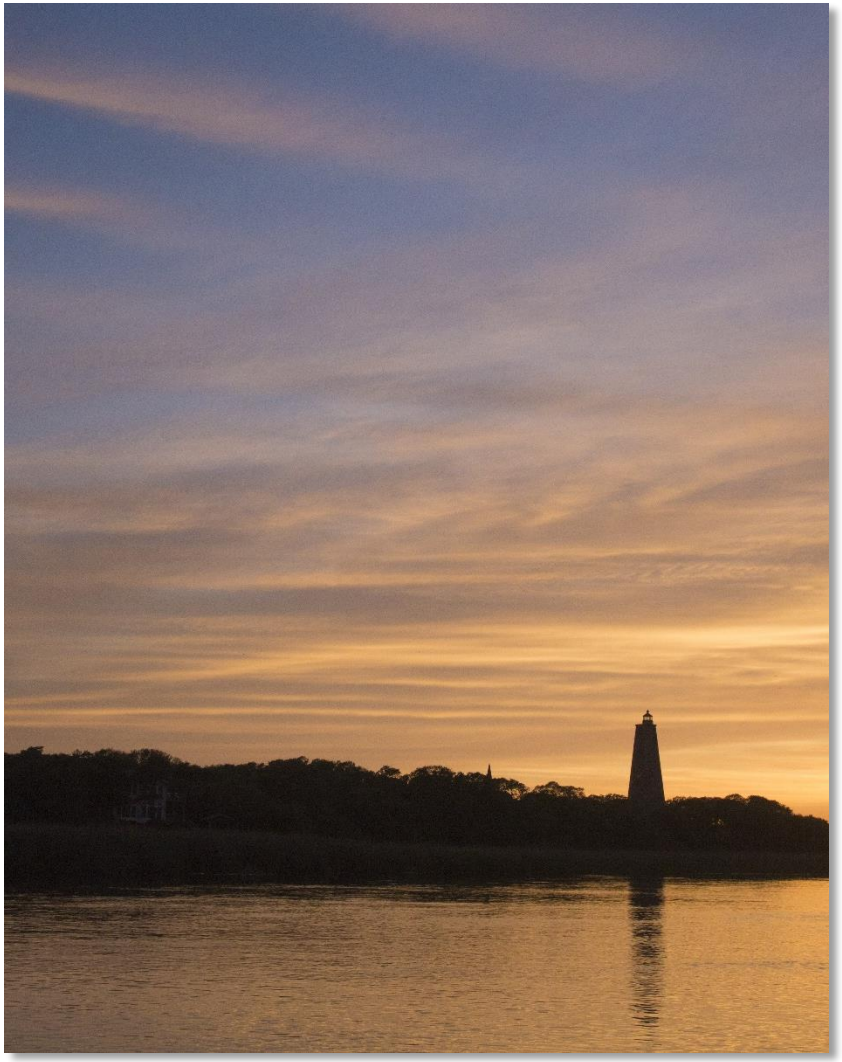
NC E-Procurement provides tools to improve the way the State of North Carolina purchases goods and services.

- Orders and internal approvals are routed electronically and maintained for accountability – encourages paper free purchasing!
- Users have access to a centrally maintained database of vendor information, including Historically Underutilized Business (HUB) certifications.
- Users can view the State term contract pricing within NC EProcurement through the catalogs and punchout catalogs.

- > 11,000 users across 174 entities
- > 5.2 Million purchase orders accounting for > $33.4 Billion in total spend

NC E-Procurement Tips & Tricks

OVERVIEW



How can you help NC E-Procurement help you?

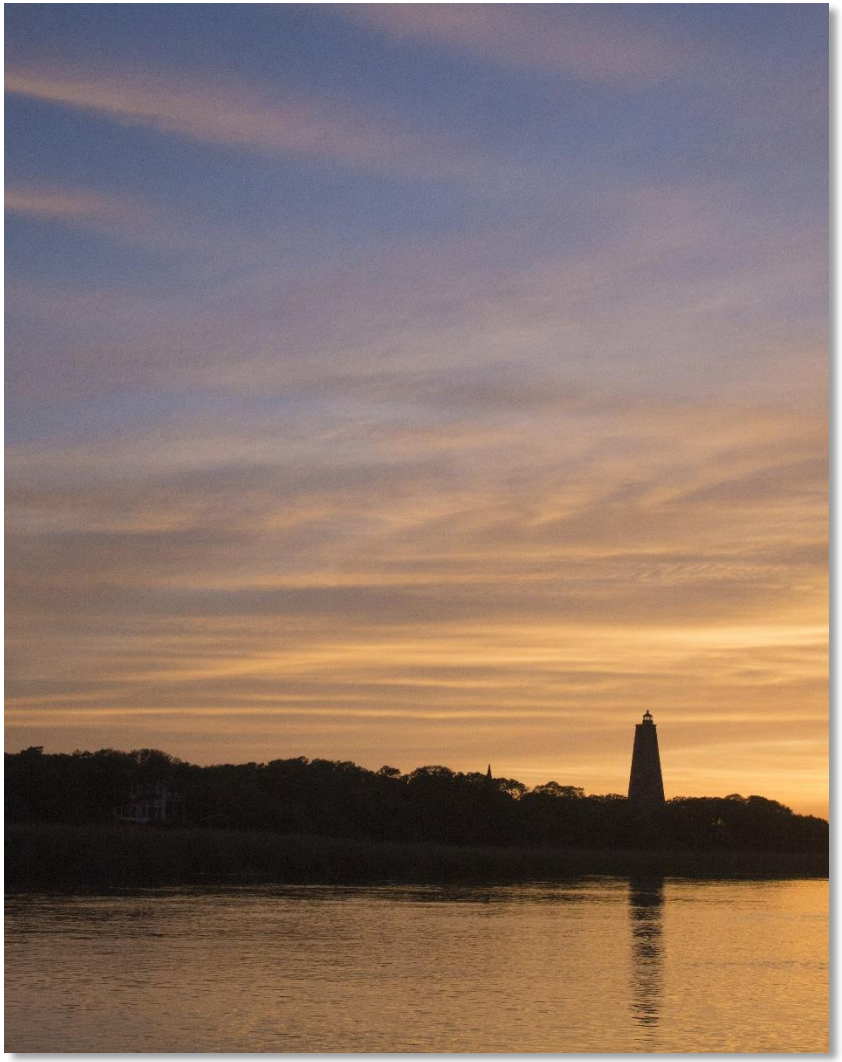
- You can **ORGANIZE** common or repeated actions for quick access
- You can **PERSONALIZE** your interactions with the system
- Additional Tips and Tricks

NC E-Procurement Tips & Tricks

ORGANIZE

How can you ORGANIZE your NC E-Procurement experience in a better way?

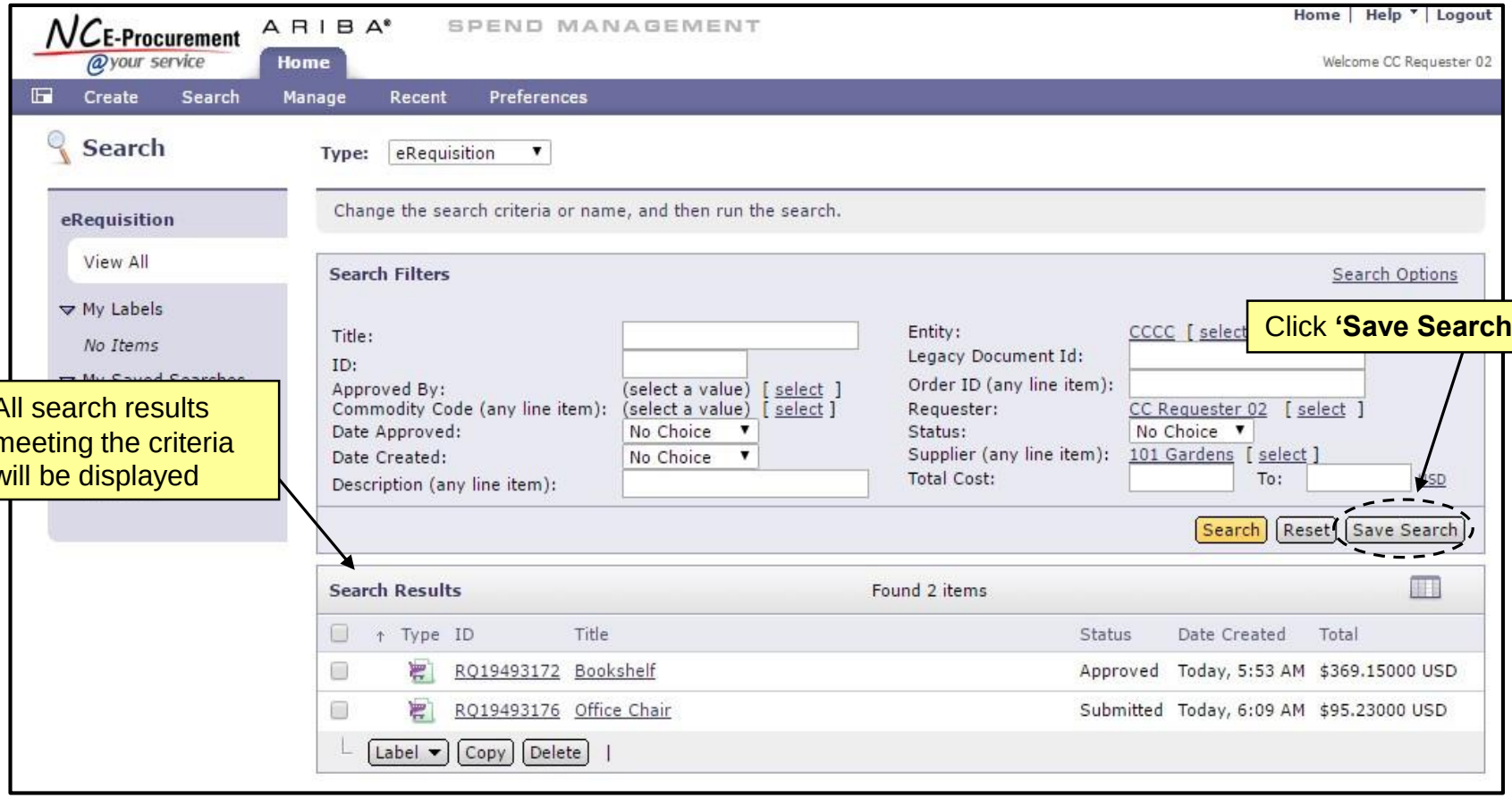
- Saving System Searches
- Saving Catalog Searches
- Personal Labels
- Managing Open Requisitions



Saving System Searches

NC E-Procurement Tips & Tricks

SAVING SYSTEM SEARCHES

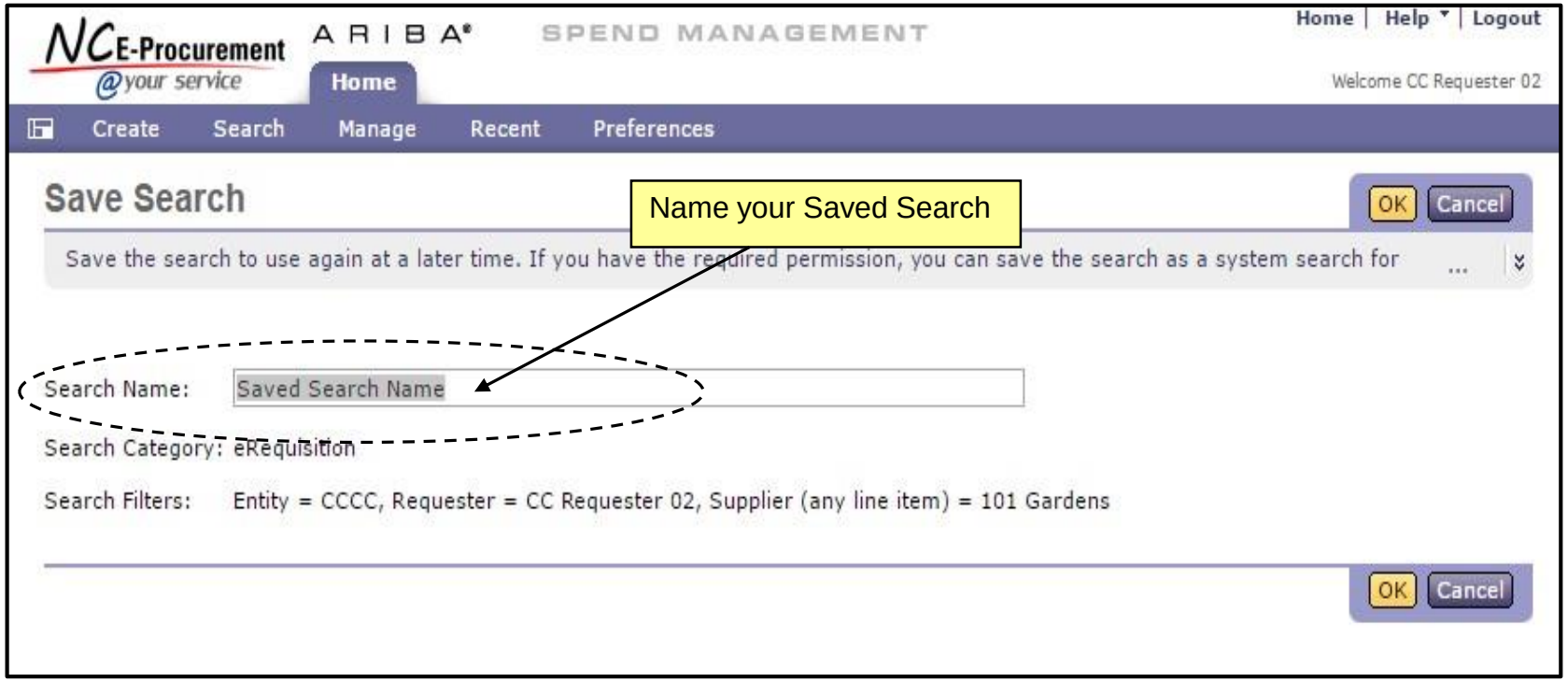


All search results meeting the criteria will be displayed

Click **'Save Search'**

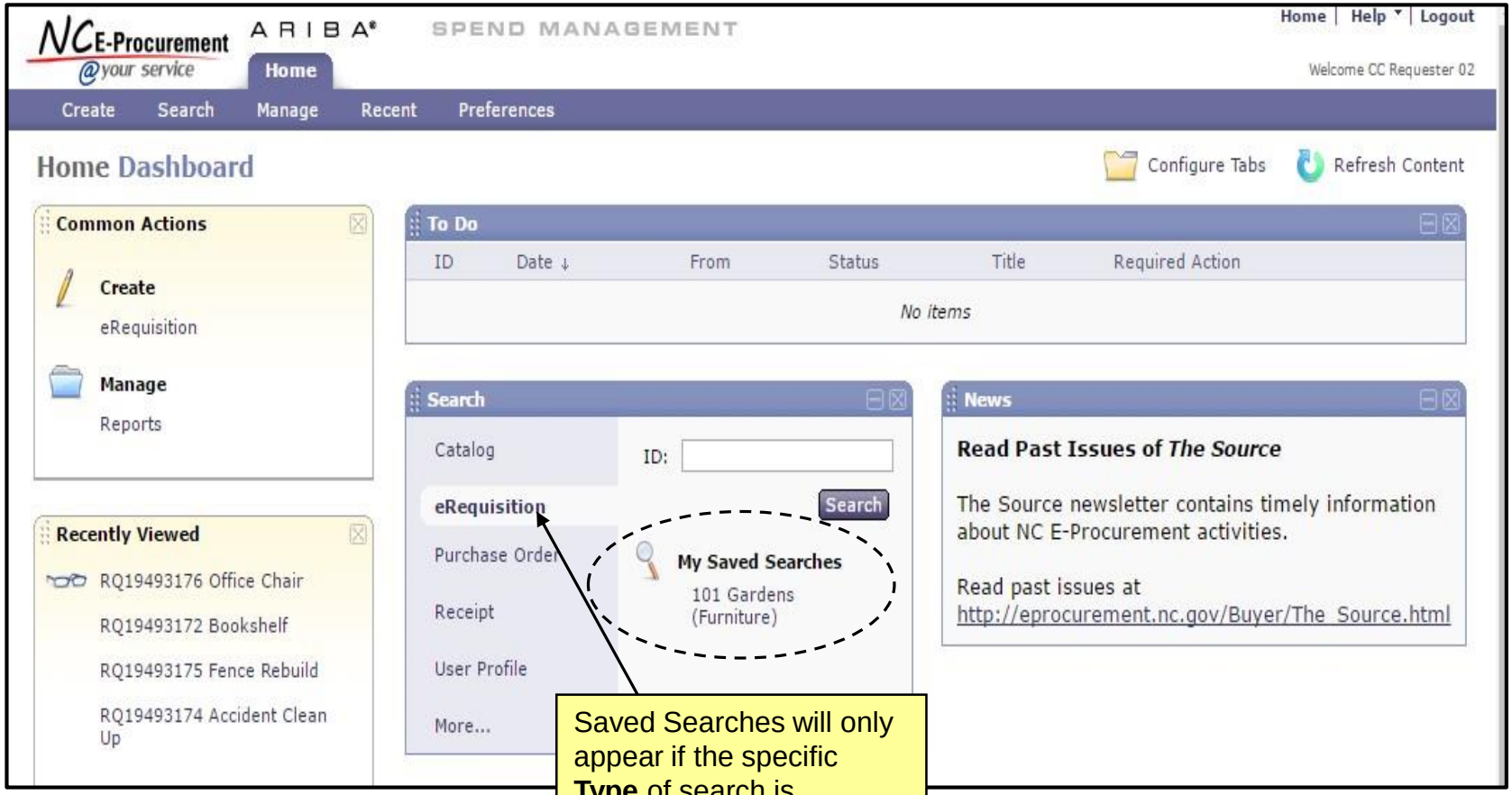
NC E-Procurement Tips & Tricks

SAVING SYSTEM SEARCHES



NC E-Procurement Tips & Tricks

SAVING SYSTEM SEARCHES

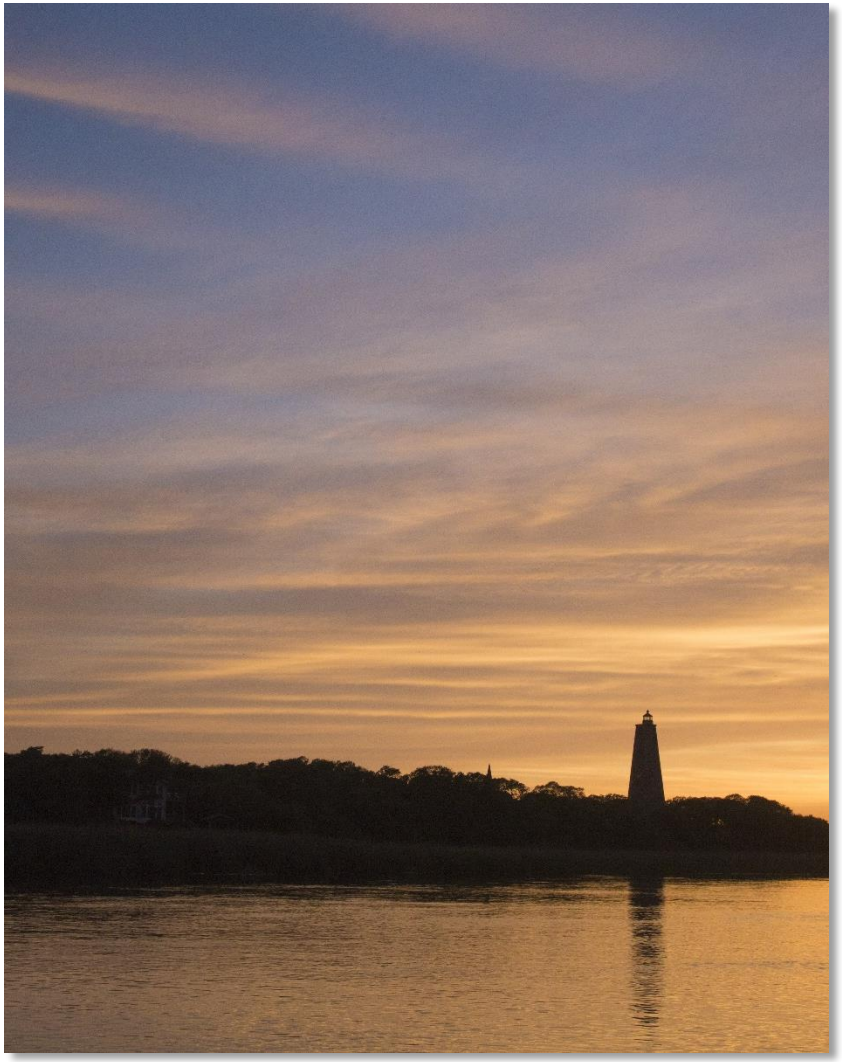


Saved Searches will only appear if the specific **Type** of search is selected

NC E-Procurement Tips & Tricks

SAVING SYSTEM SEARCHES

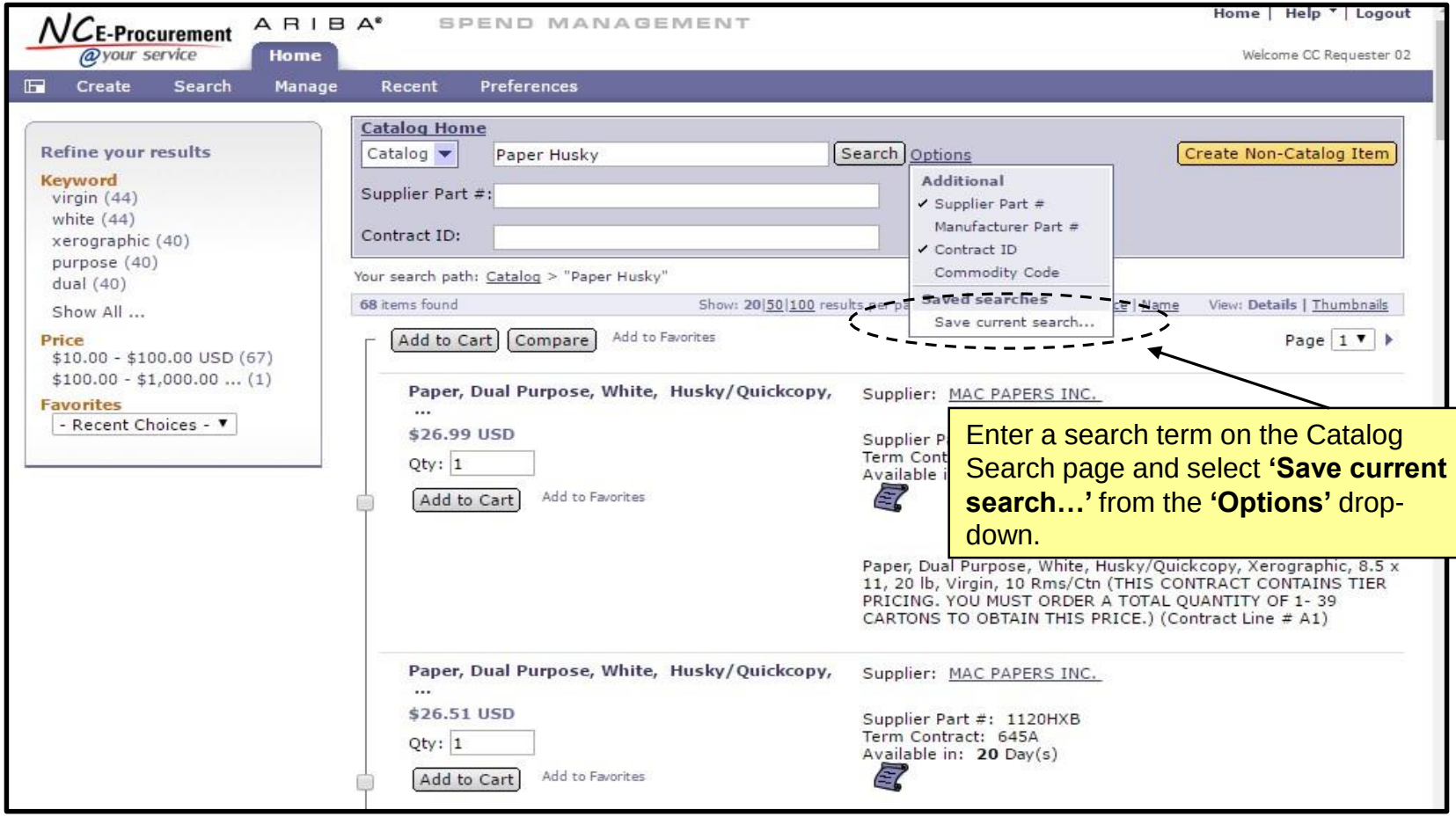
Saved Searches are listed here. Select the desired Saved Search and click **'Search'** to execute the search.



Saving Catalog Searches

NC E-Procurement Tips & Tricks

SAVING CATALOG SEARCHES



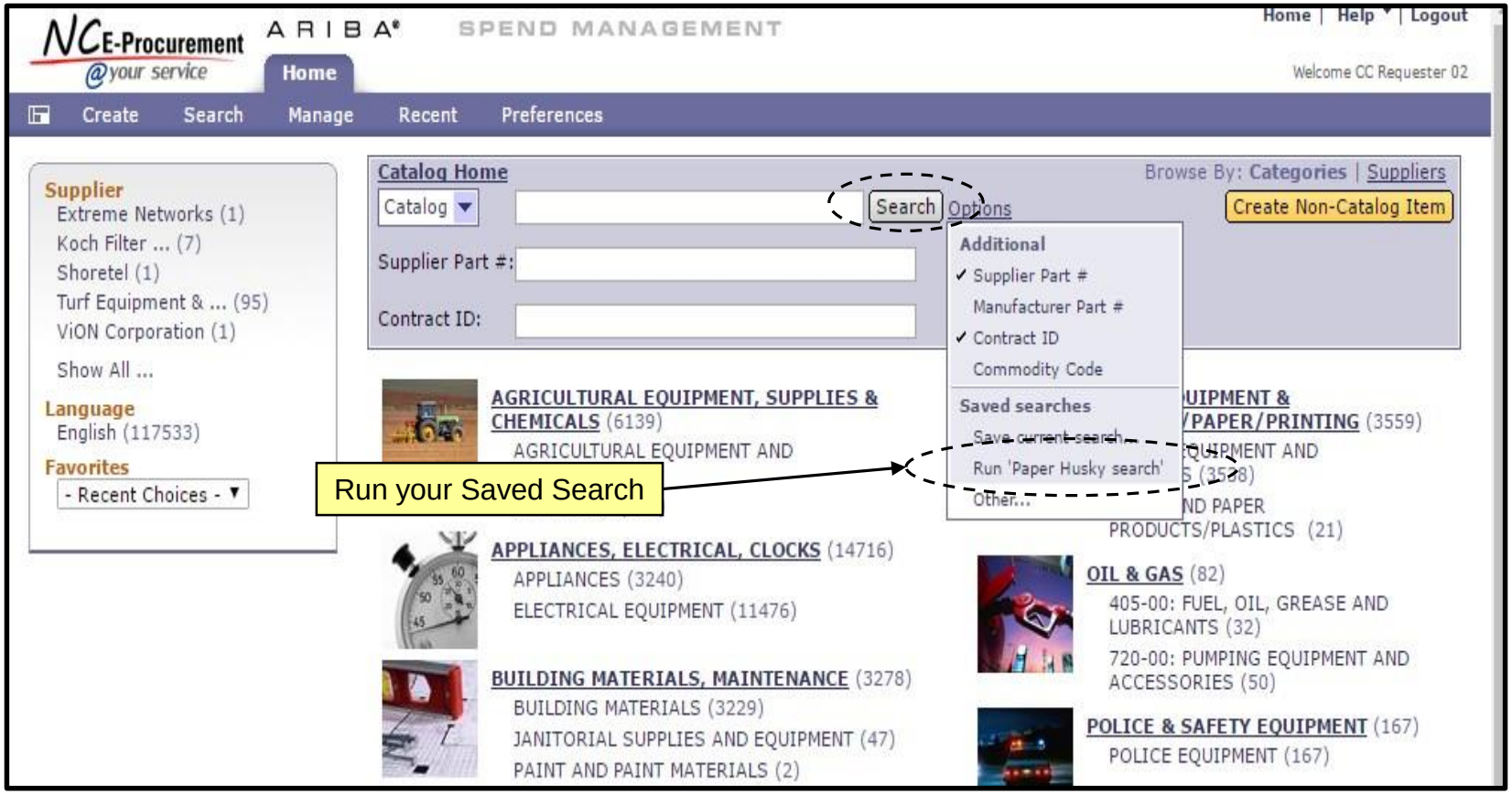
Enter a search term on the Catalog Search page and select **'Save current search…'** from the **'Options'** drop-down.

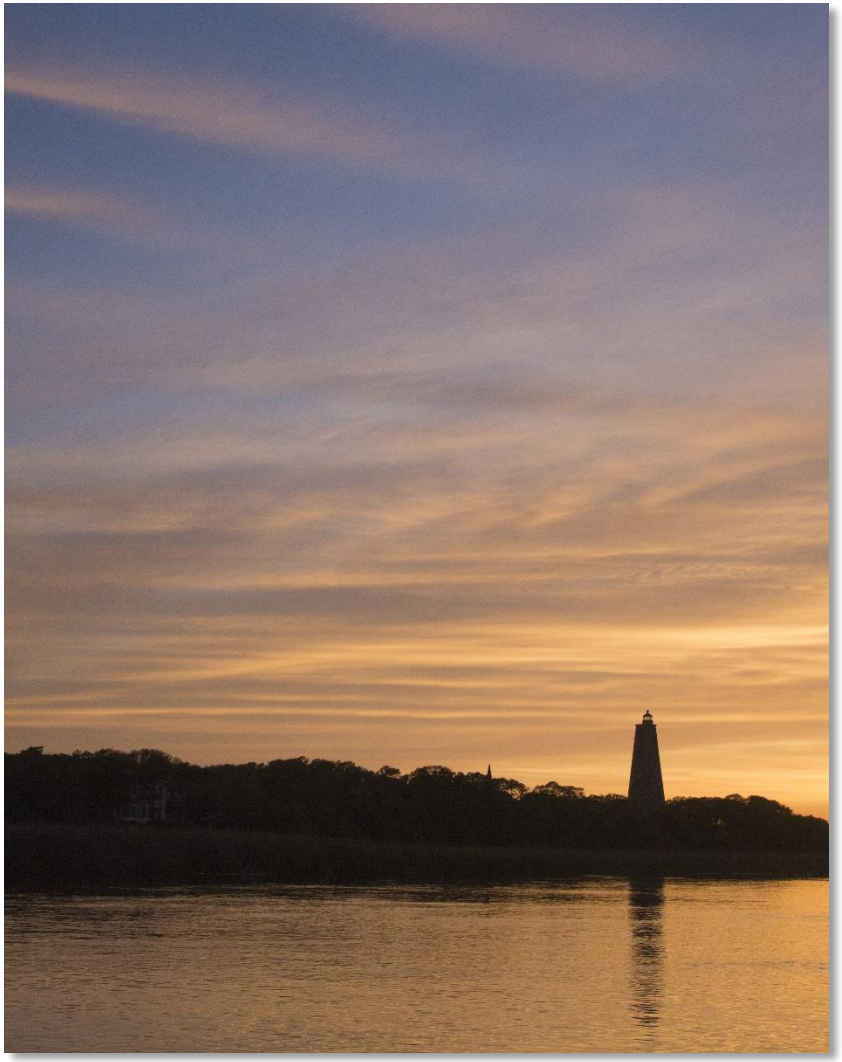
NC E-Procurement Tips & Tricks

SAVING CATALOG SEARCHES

NC E-Procurement Tips & Tricks

SAVING CATALOG SEARCHES





Personal Labels

Searches vs. Labels

A user should use **system searches** instead of labels in scenarios where there is a shared characteristic across all of the approvables in the group. For example, if the user would like to quickly locate all of the requisitions for one supplier, they should use System Searches instead of labels.

A user should apply a **label** to an item when it is something that they need to be able to access quickly but that may not share a common search field with the other items that are in the same label.

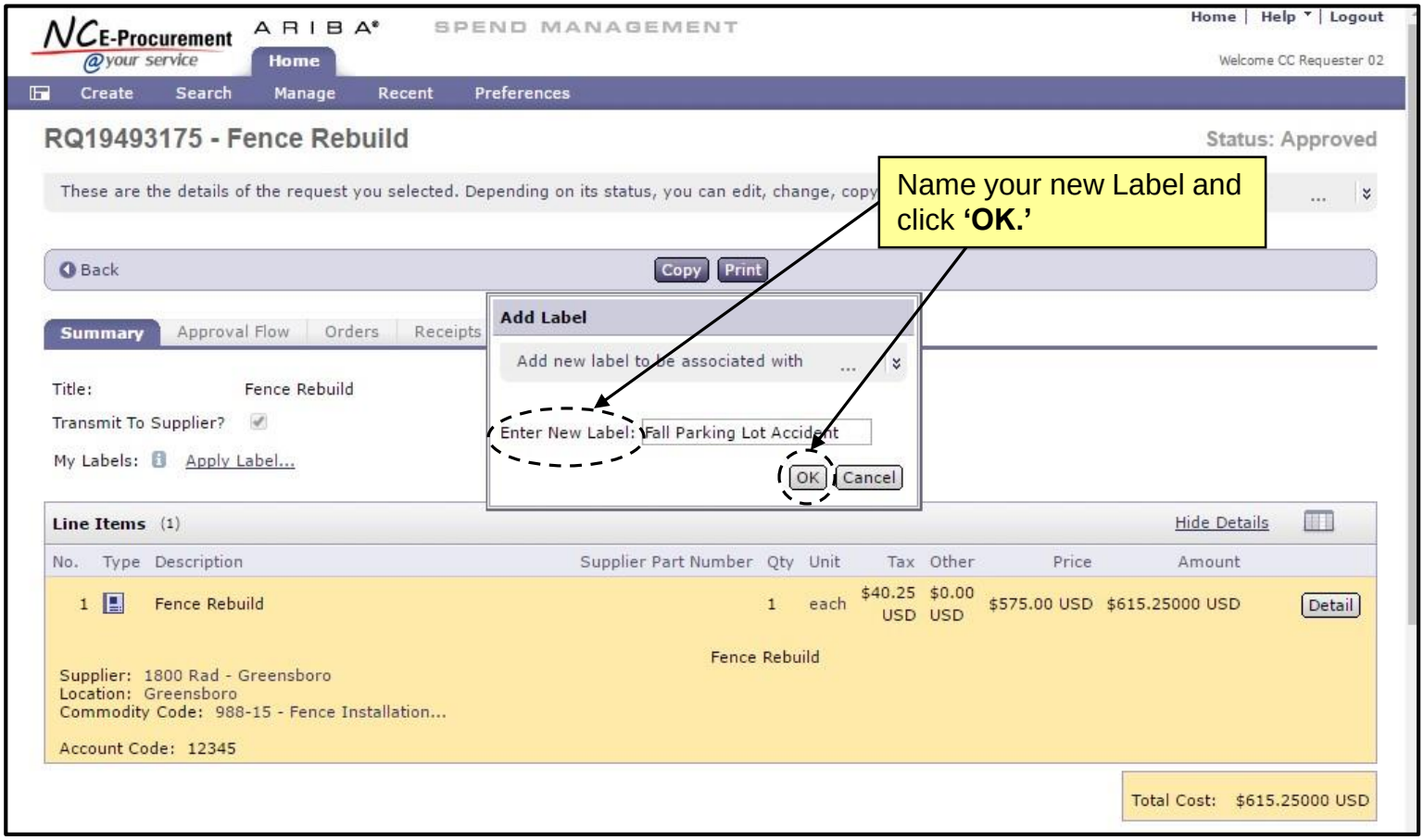
Labels are a good way to group together approvables that are all related to the same event, such as requisitions relating to a specific one-time event on campus, like an accident.

NC E-Procurement Tips & Tricks

PERSONAL LABELS

NC E-Procurement Tips & Tricks

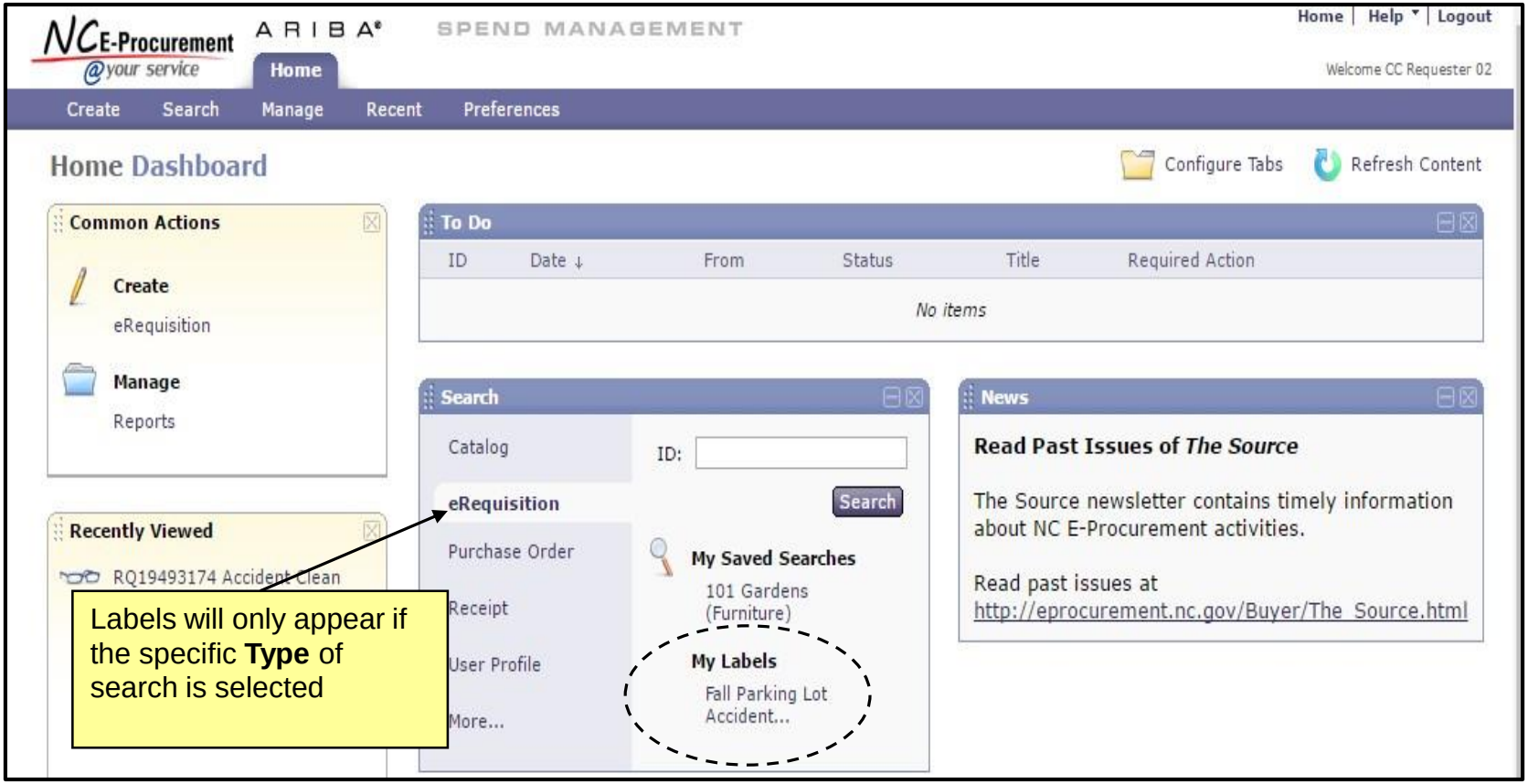
PERSONAL LABELS



Name your new Label and click **'OK.'**

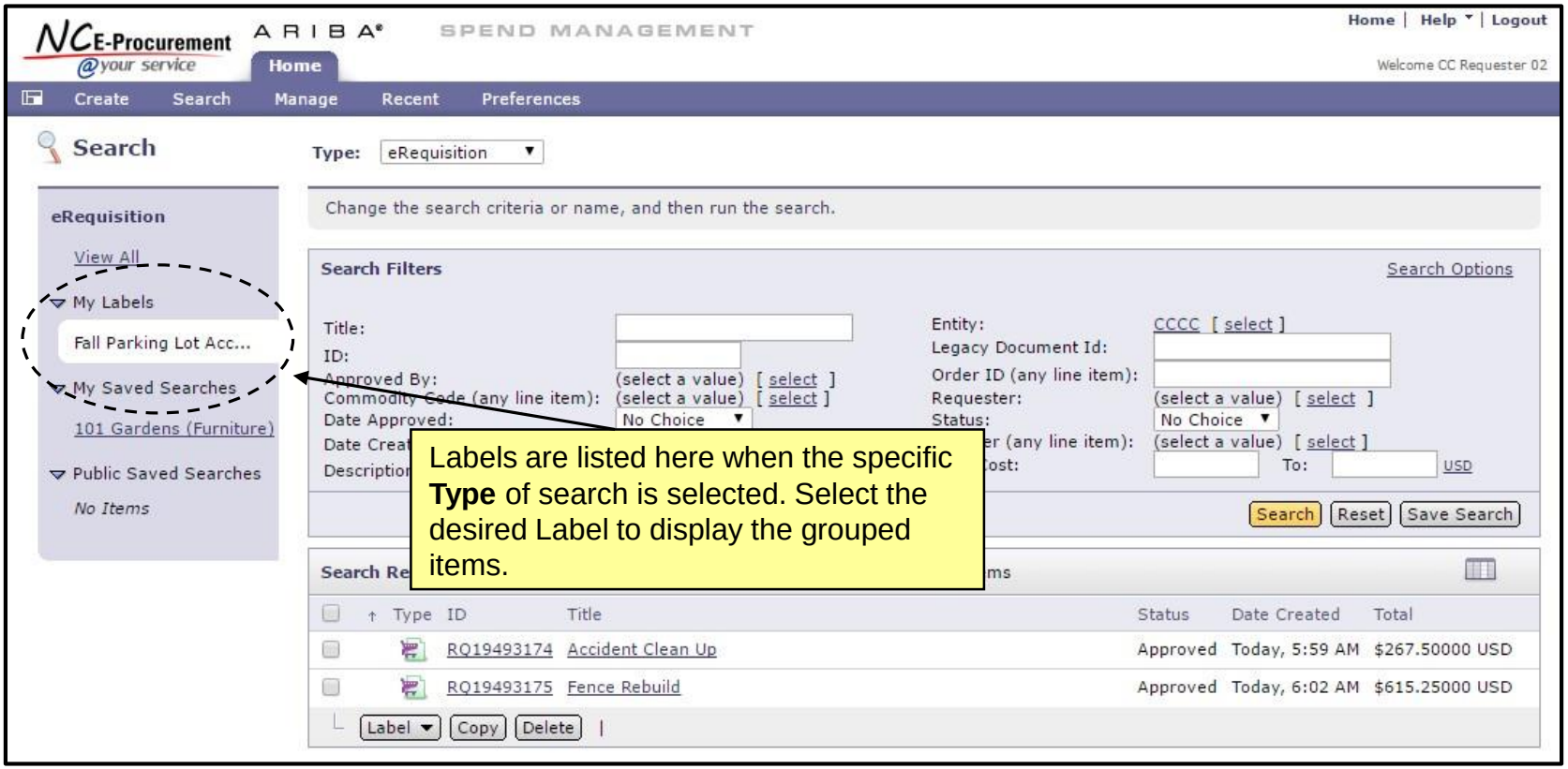
NC E-Procurement Tips & Tricks

PERSONAL LABELS



NC E-Procurement Tips & Tricks

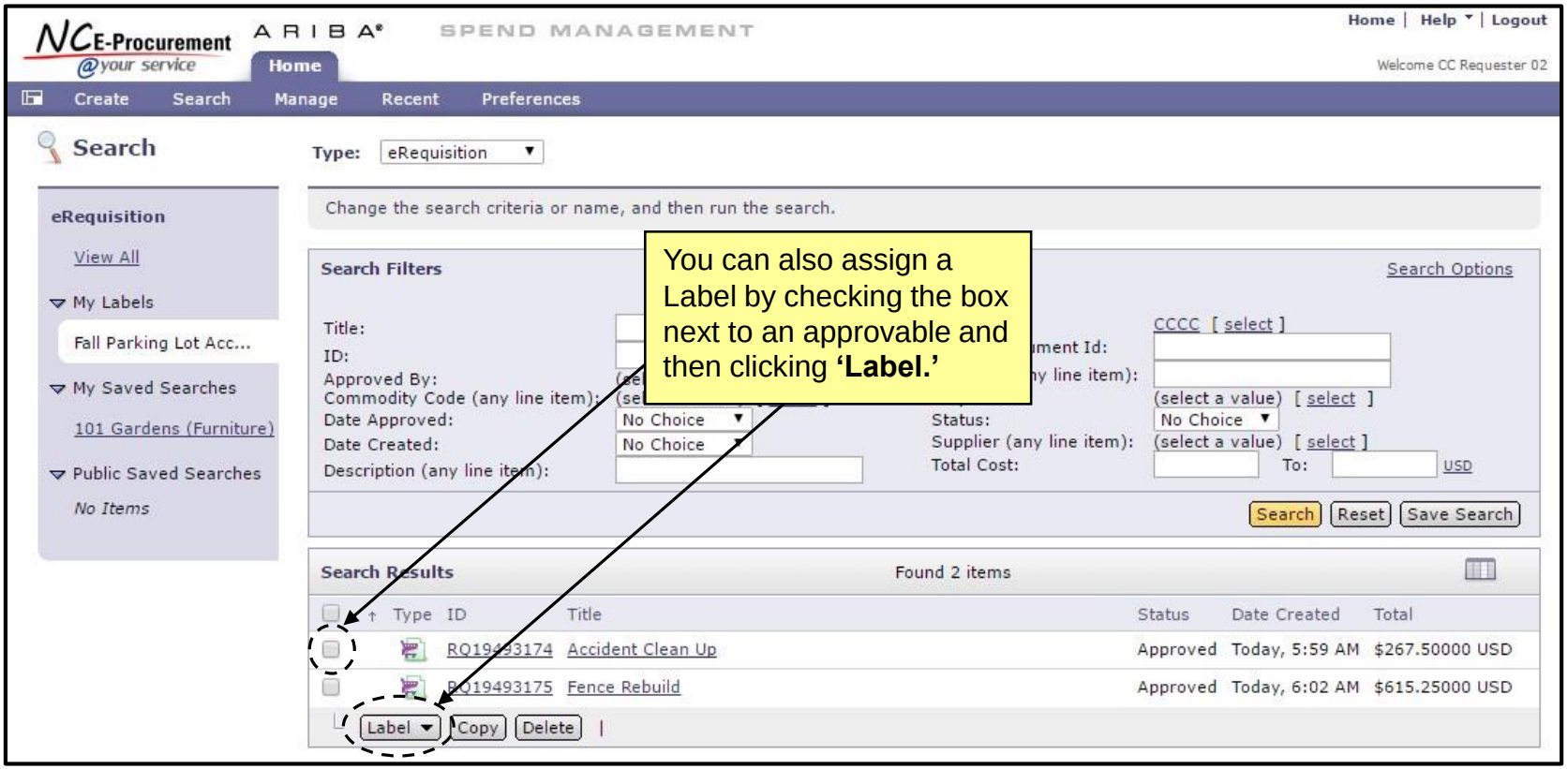
PERSONAL LABELS



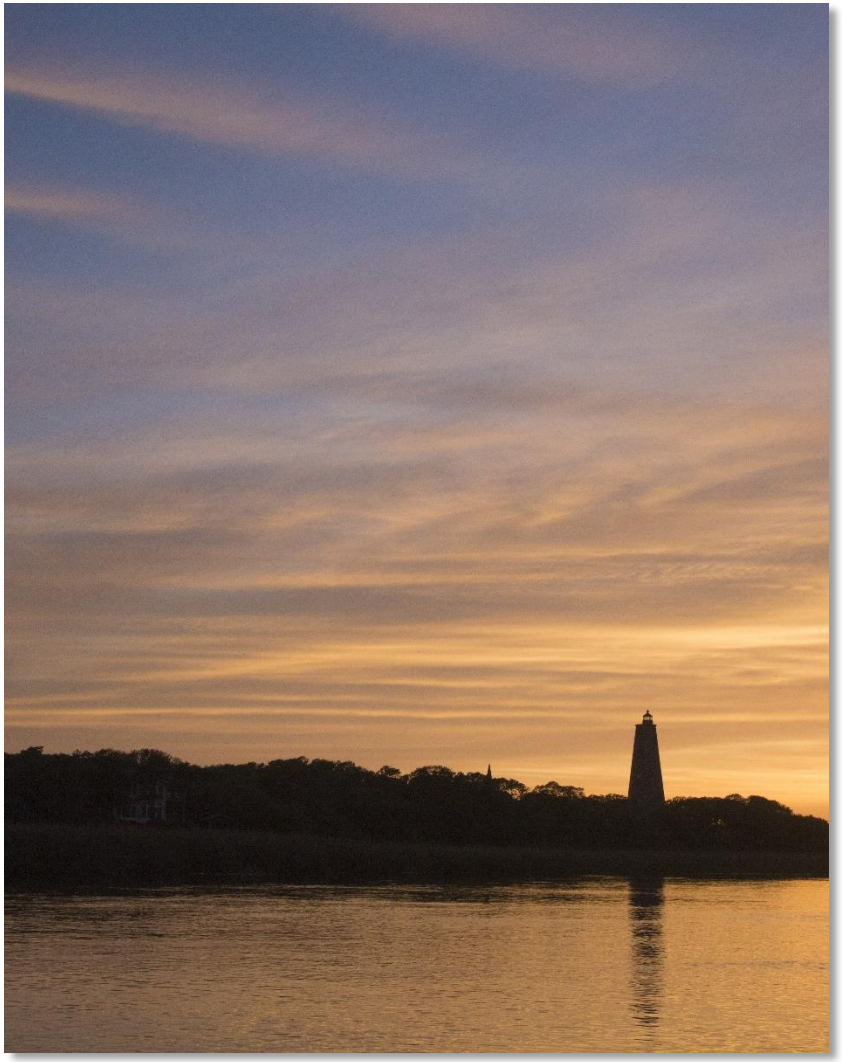
Labels are listed here when the specific **Type** of search is selected. Select the desired Label to display the grouped items.

NC E-Procurement Tips & Tricks

PERSONAL LABELS



You can also assign a Label by checking the box next to an approvable and then clicking **'Label.'**



Managing Open eRequisitions

Prior to deleting a user, all transactions created by that user must be in a completed state, i.e., all eRequisitions must be in **'Approved'** status. This means that all eRequisitions with a **'Composing,' 'Denied,'** or **'Submitted'** status should be resolved by the user before they leave the agency.

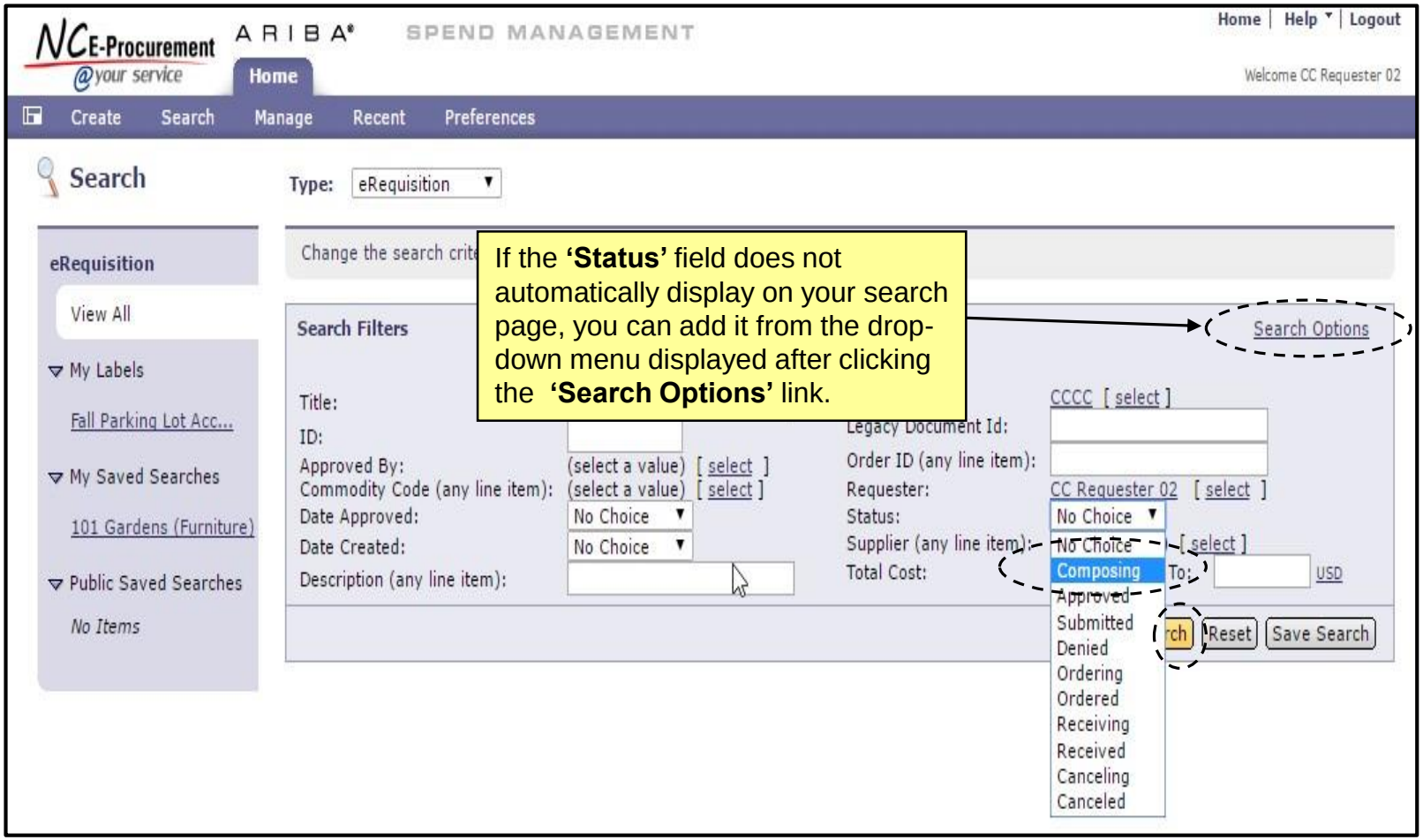
Based on the status of the eRequisition, the following resolutions may apply:

- **Composing** – Delete
- **Denied** – Withdraw & Delete the eRequisition. If changes are required, updates should be made and submitted under an active user account.
- **Submitted** – Fully Approve or Withdraw & Delete the eRequisition.

If a user has already left the agency without having first converted all eRequisitions to **'Approved'** status, it will not be possible to delete them without assistance from the NC E-Procurement Help Desk. Following a written request, the Help Desk can update the **'On Behalf Of'** field and the new user will then be able to search for and delete or otherwise act upon the above types of open eRequisitions.

NC E-Procurement Tips & Tricks

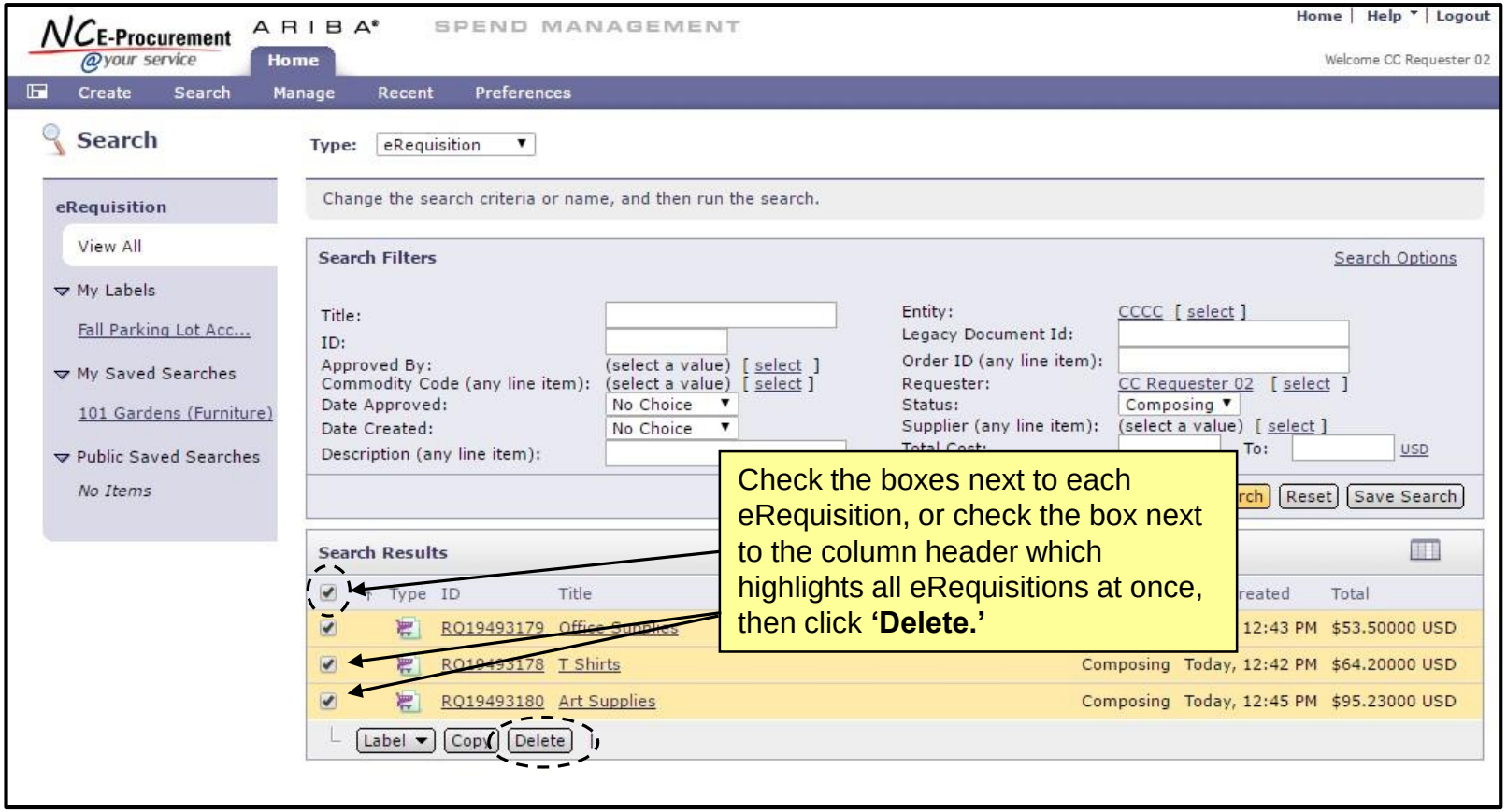
MANAGING OPEN eREQUISITIONS



If the **'Status'** field does not automatically display on your search page, you can add it from the drop-down menu displayed after clicking the **'Search Options'** link.

NC E-Procurement Tips & Tricks

MANAGING OPEN eREQUISITIONS



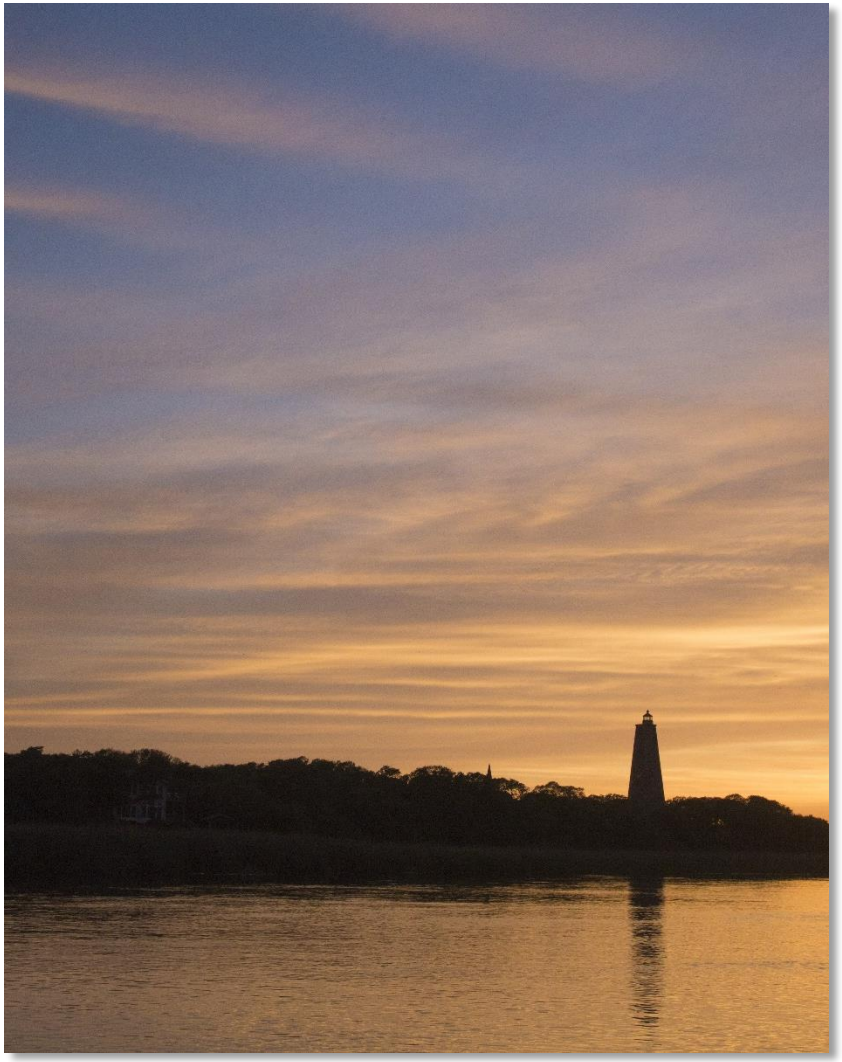
Check the boxes next to each eRequisition, or check the box next to the column header which highlights all eRequisitions at once, then click **'Delete.'**

NC E-Procurement Tips & Tricks

PERSONALIZE

How can you PERSONALIZE your NC E-Procurement experience in a better way?

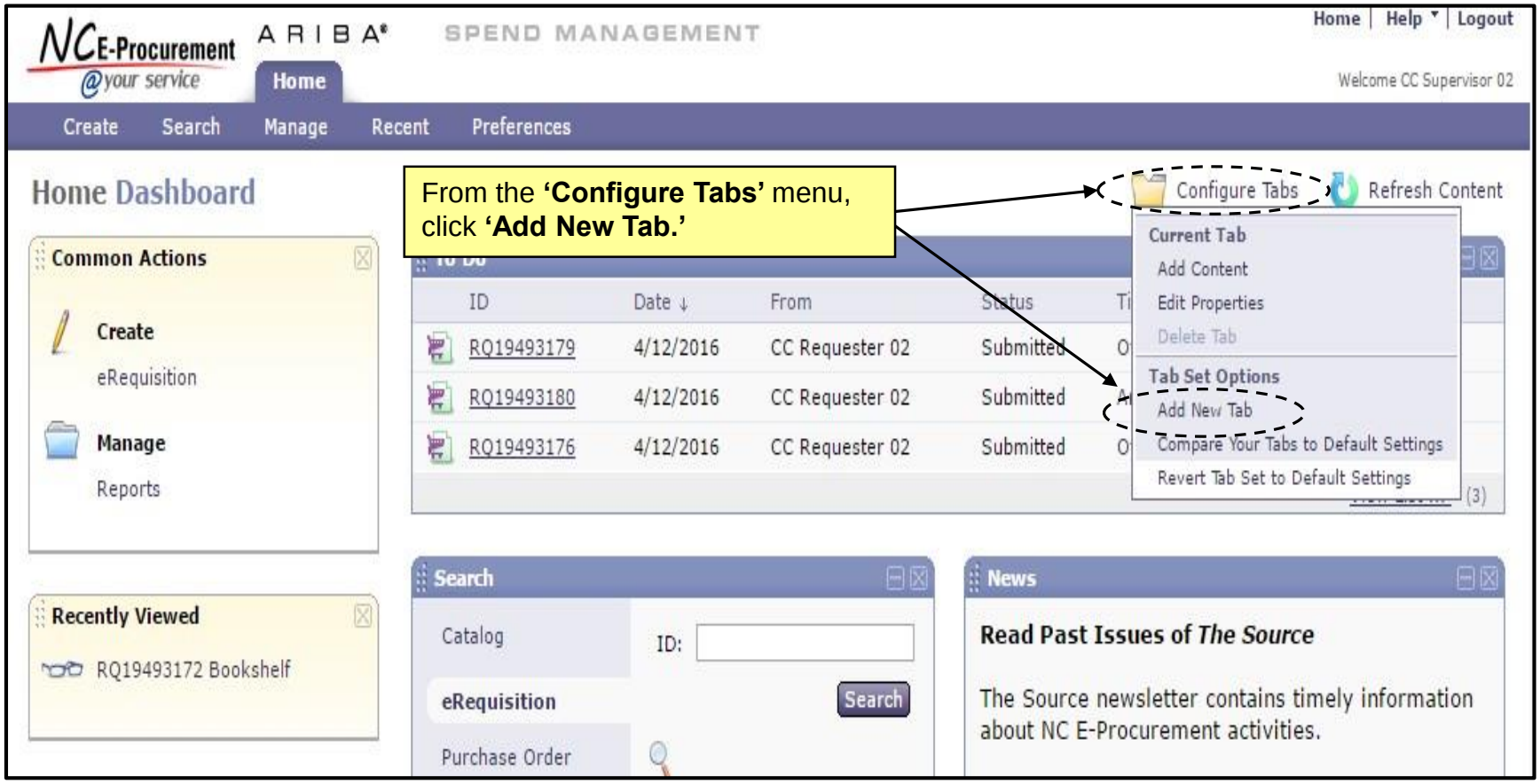
- Configure Tabs
- Configure Portlets
- Manage Email Notifications
- Reset Default Preferences

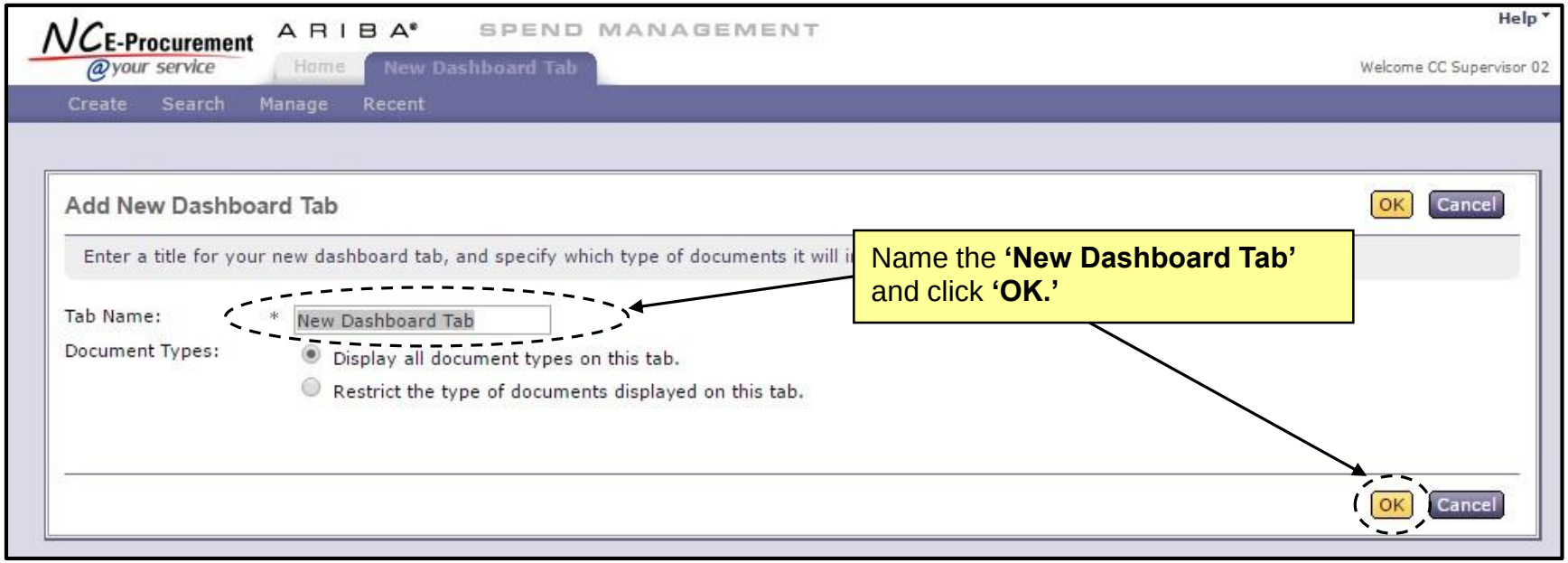


Configure Tabs

NC E-Procurement Tips & Tricks

CONFIGURE TABS

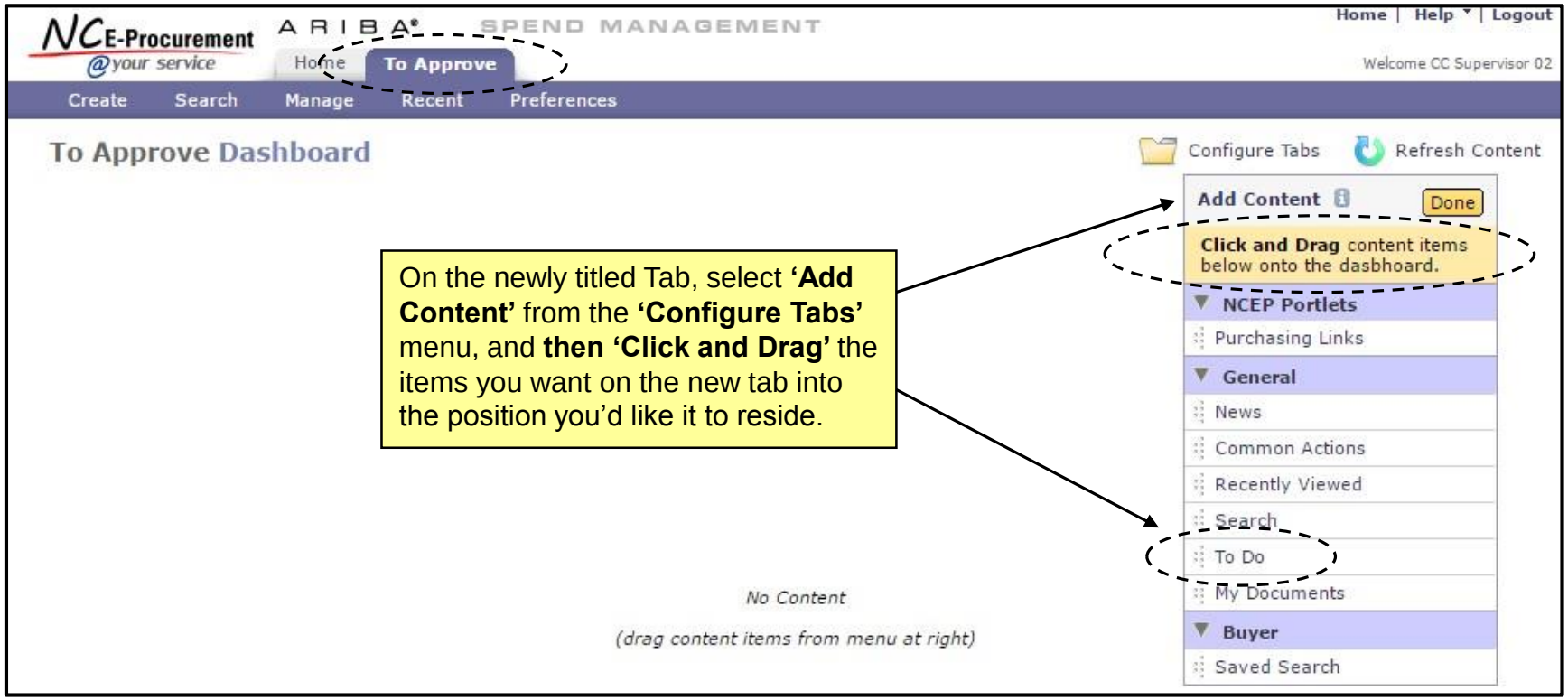




Name the **'New Dashboard Tab'** and click **'OK.'**

NC E-Procurement Tips & Tricks

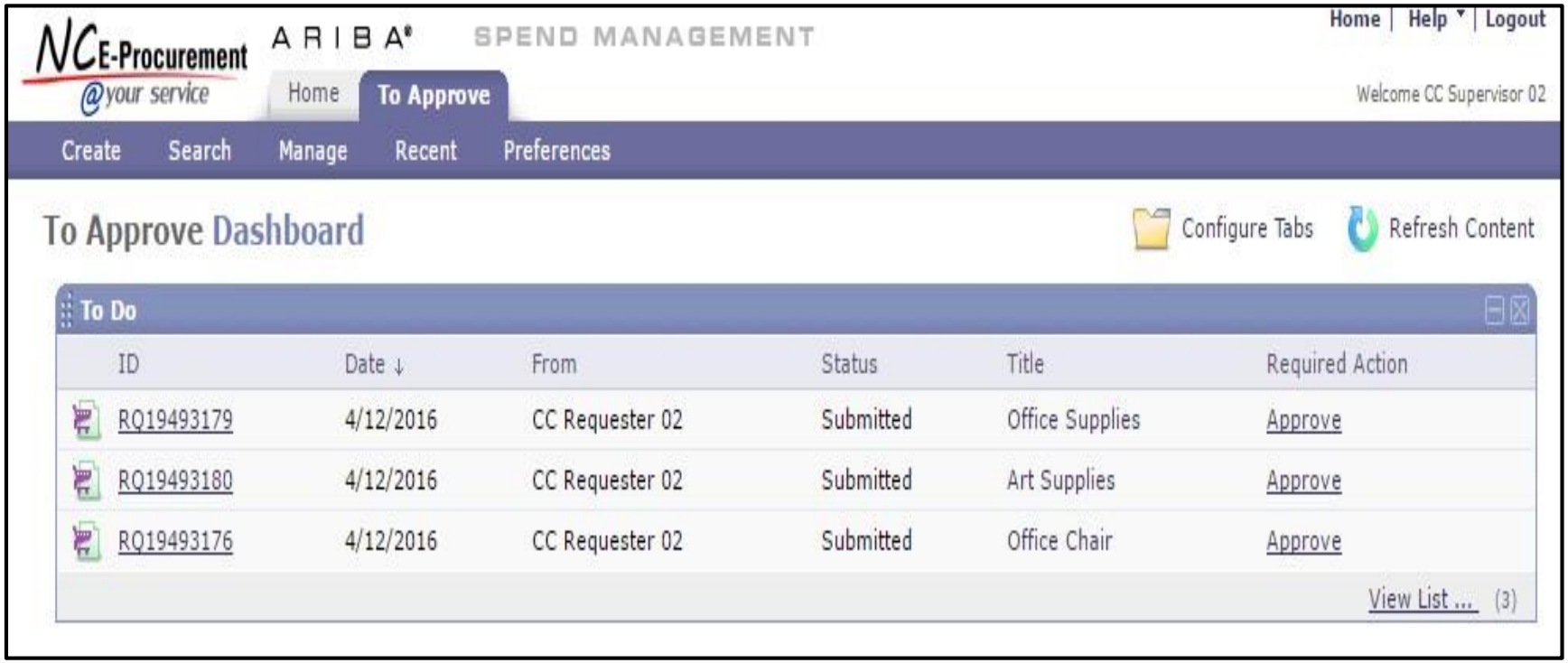
CONFIGURE TABS

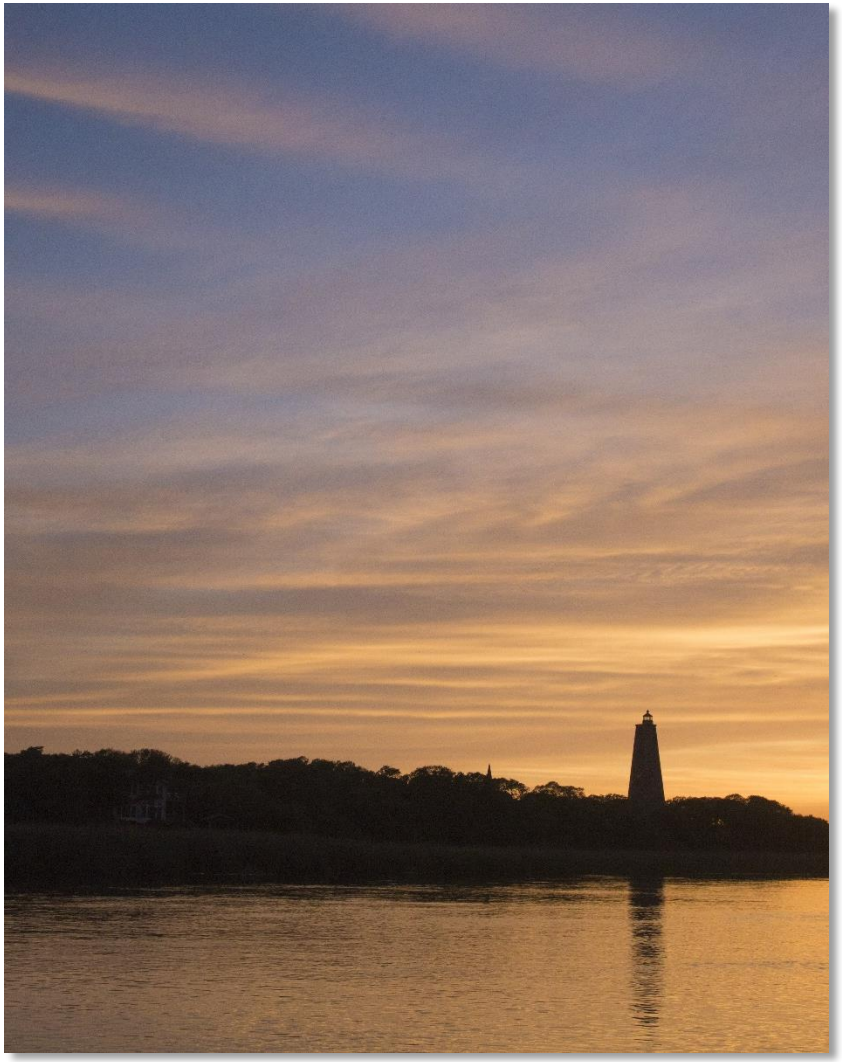


On the newly titled Tab, select **'Add Content'** from the **'Configure Tabs'** menu, and **then 'Click and Drag'** the items you want on the new tab into the position you'd like it to reside.

NC E-Procurement Tips & Tricks

CONFIGURE TABS

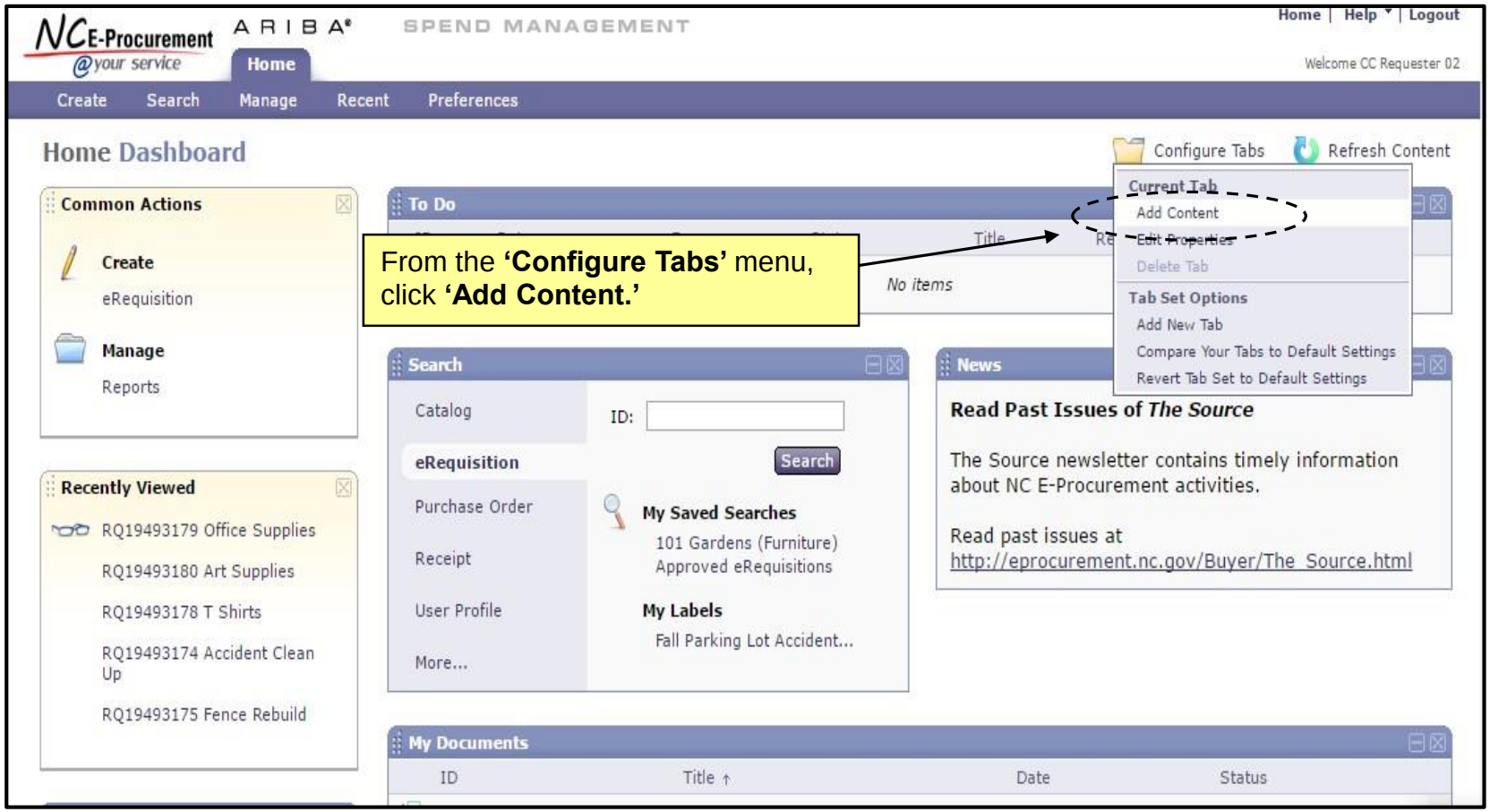




Configure Portlets

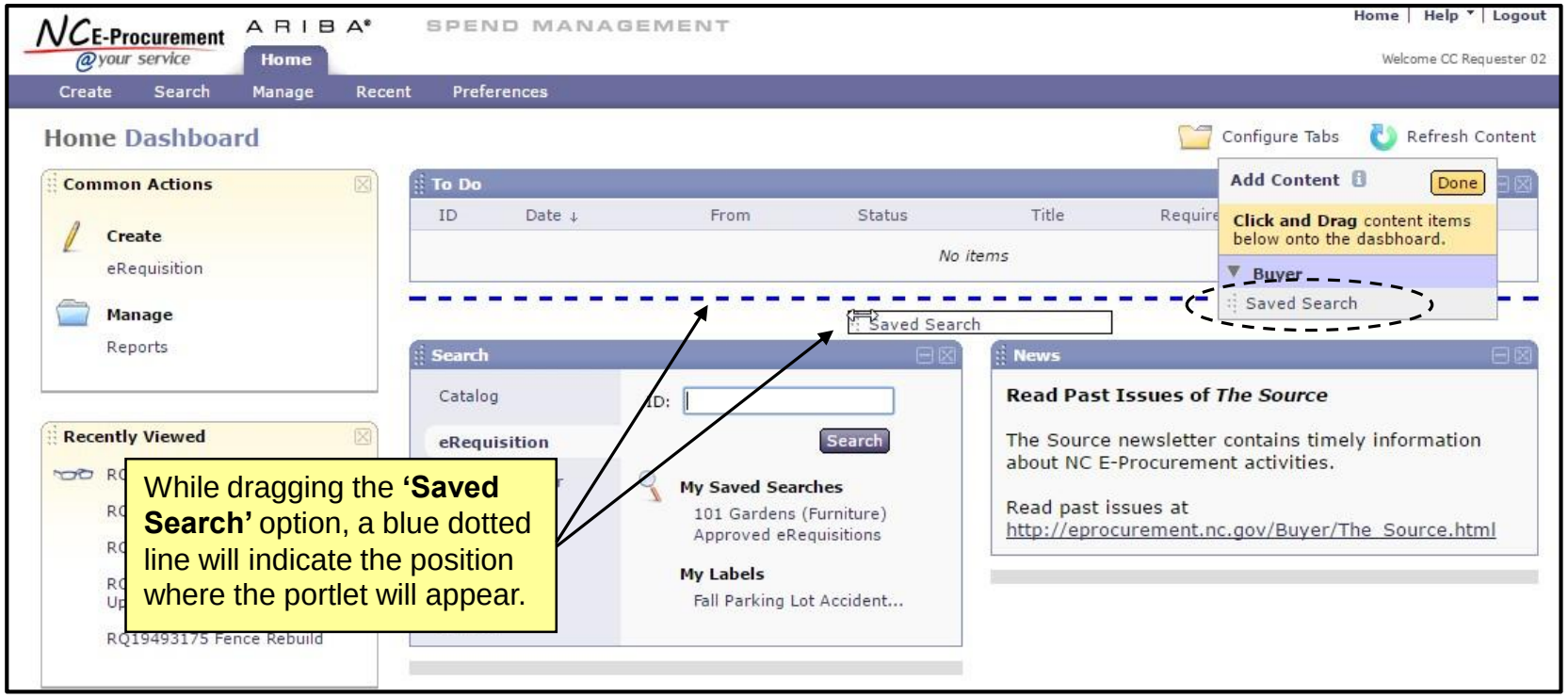
NC E-Procurement Tips & Tricks

CONFIGURE PORTLETS



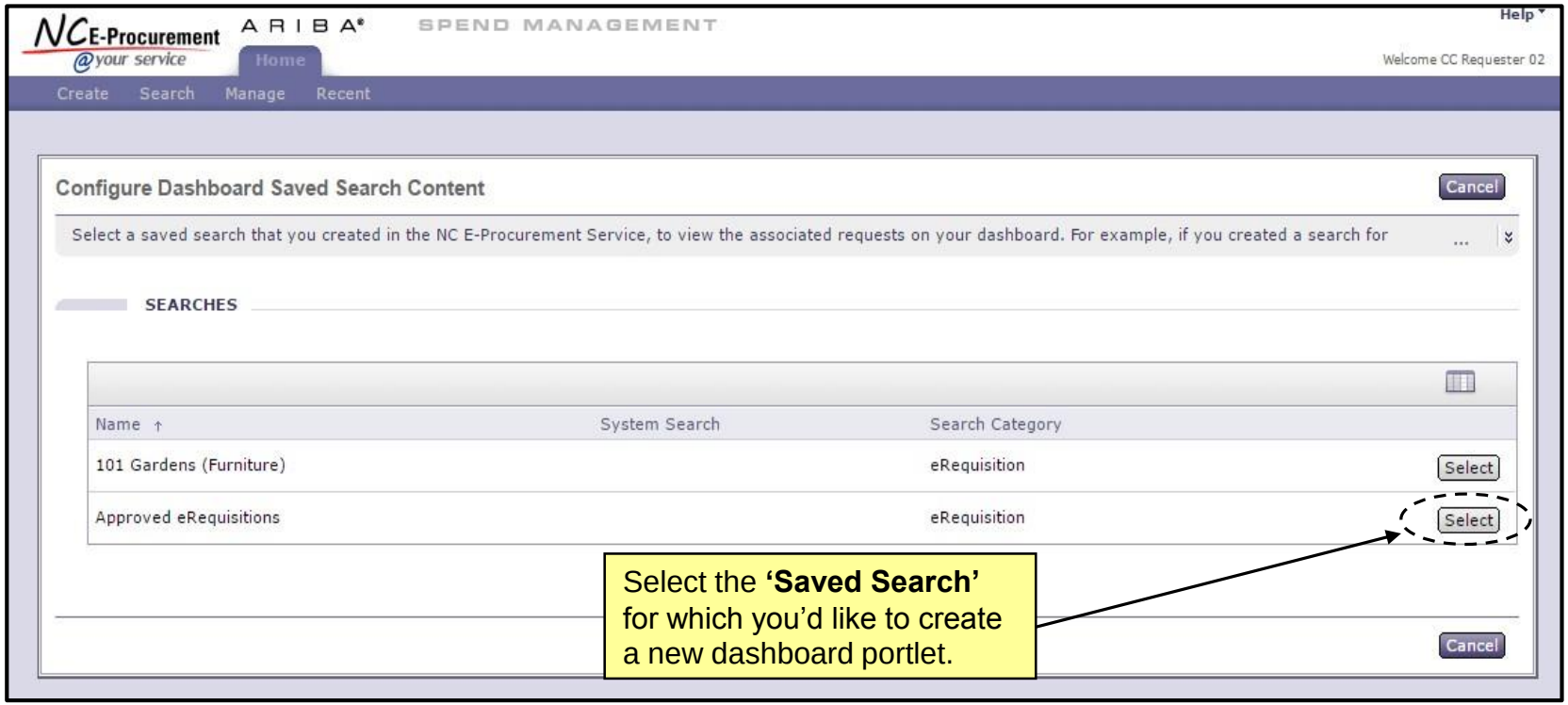
NC E-Procurement Tips & Tricks

CONFIGURE PORTLETS



NC E-Procurement Tips & Tricks

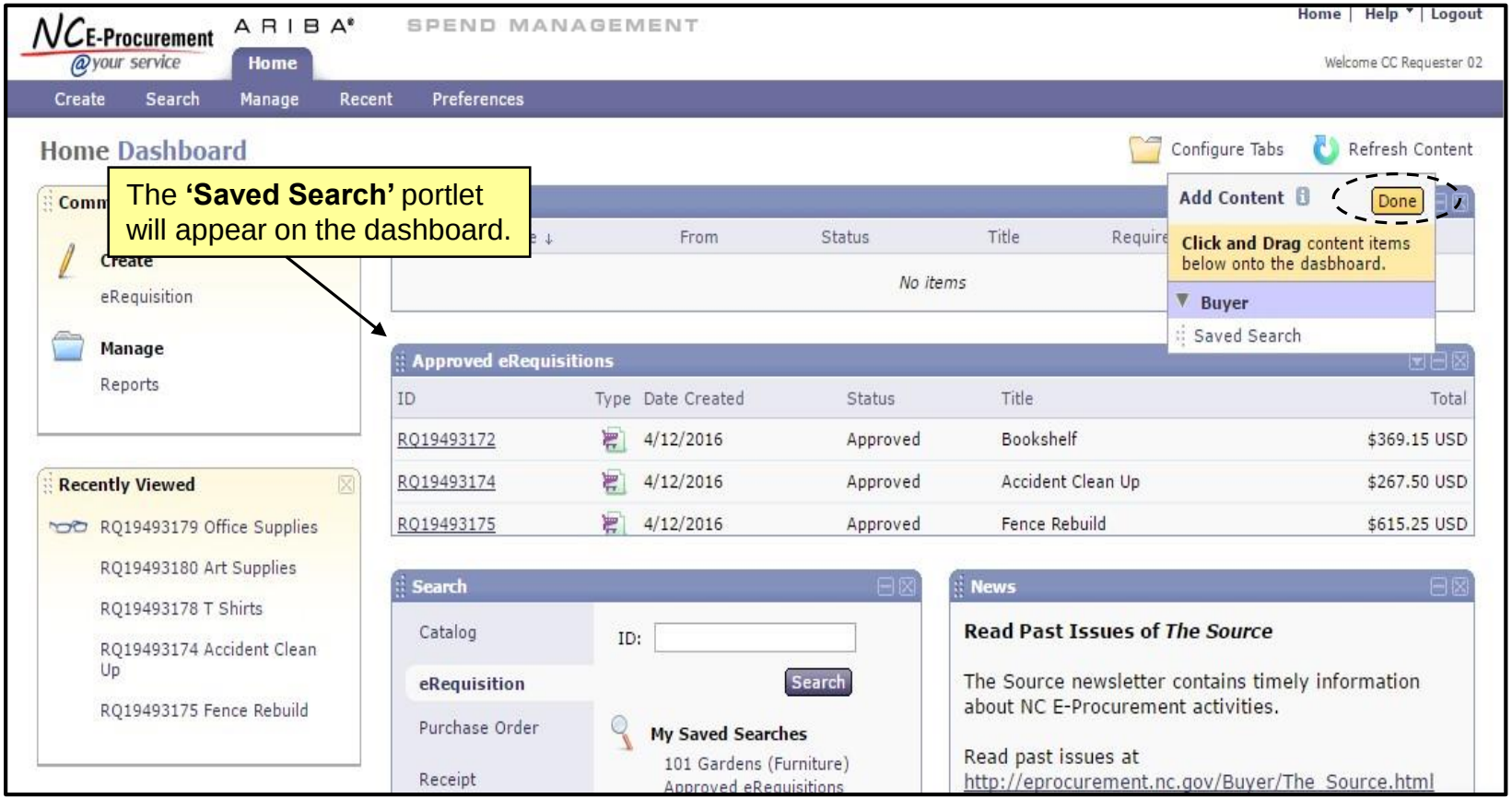
CONFIGURE PORTLETS

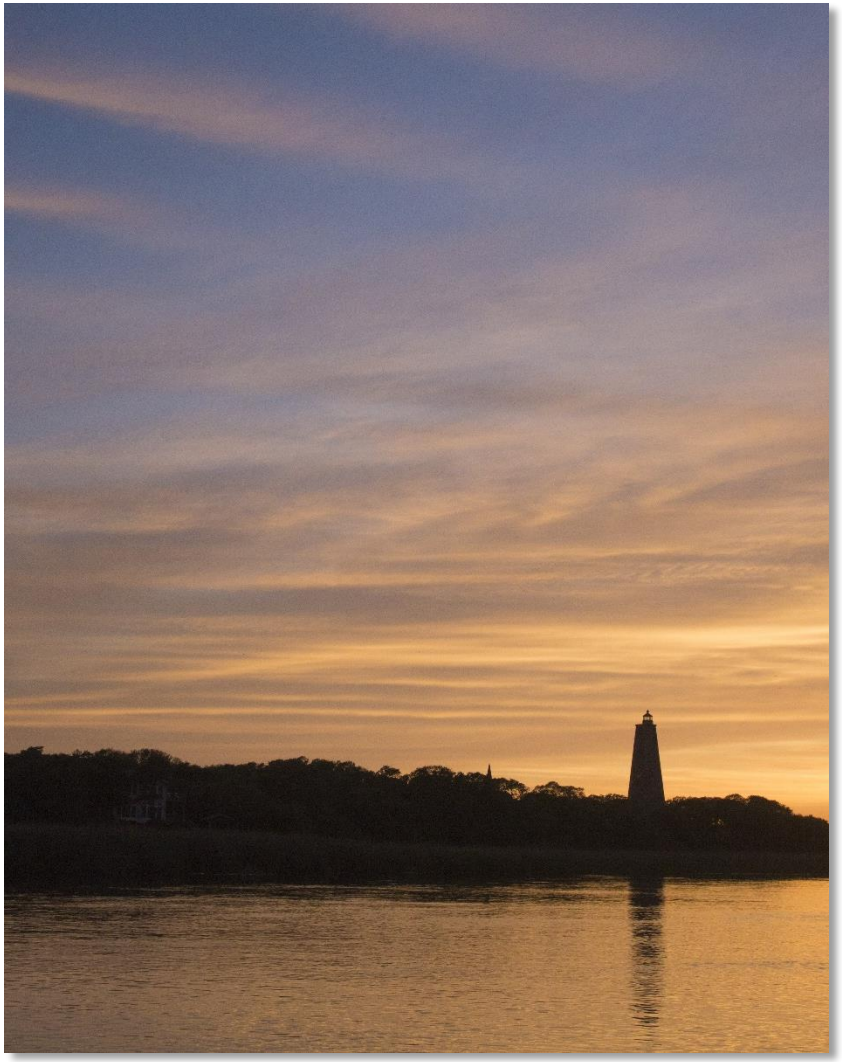


Select the **'Saved Search'** for which you'd like to create a new dashboard portlet.

NC E-Procurement Tips & Tricks

CONFIGURE PORTLETS

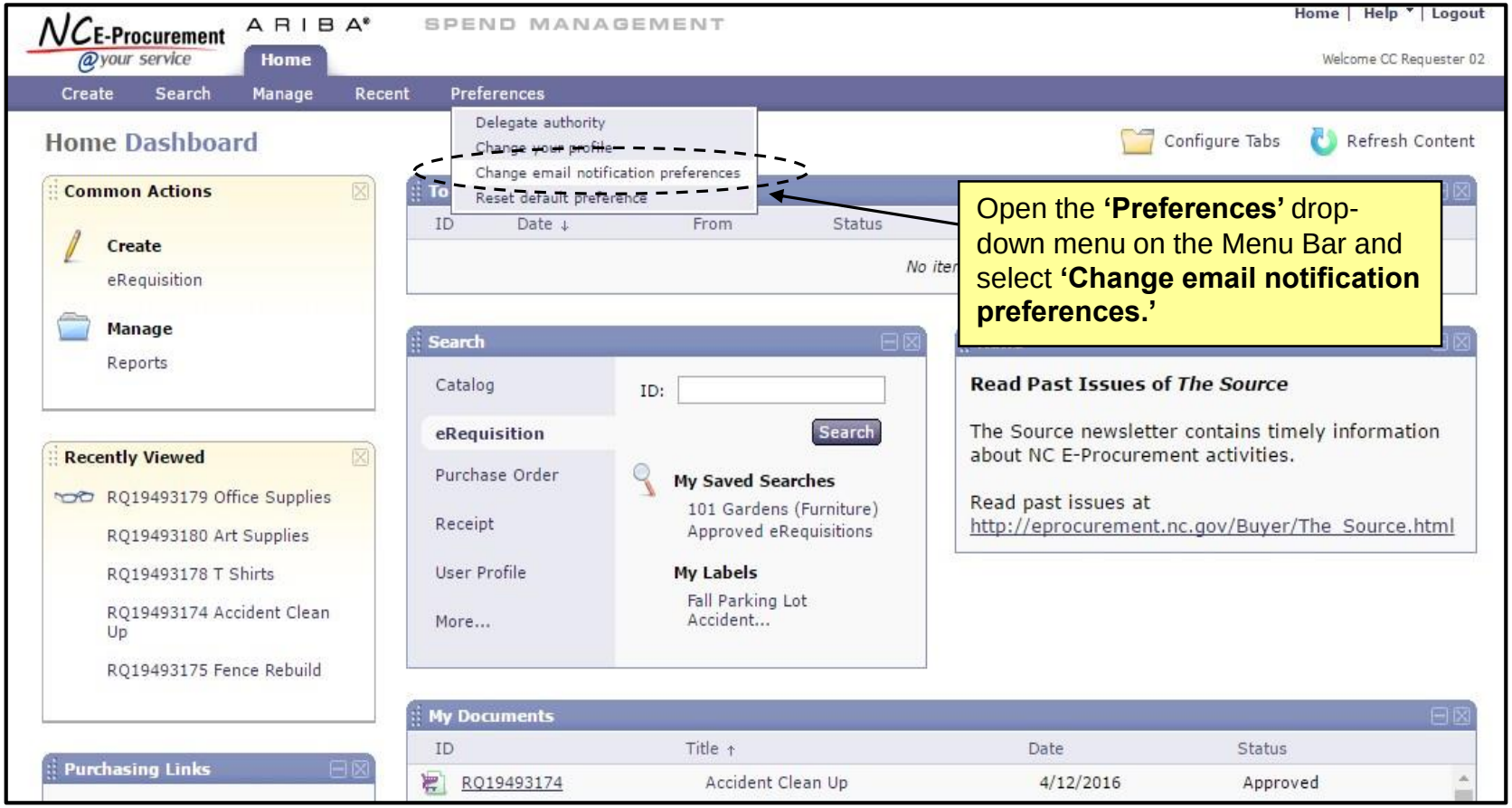




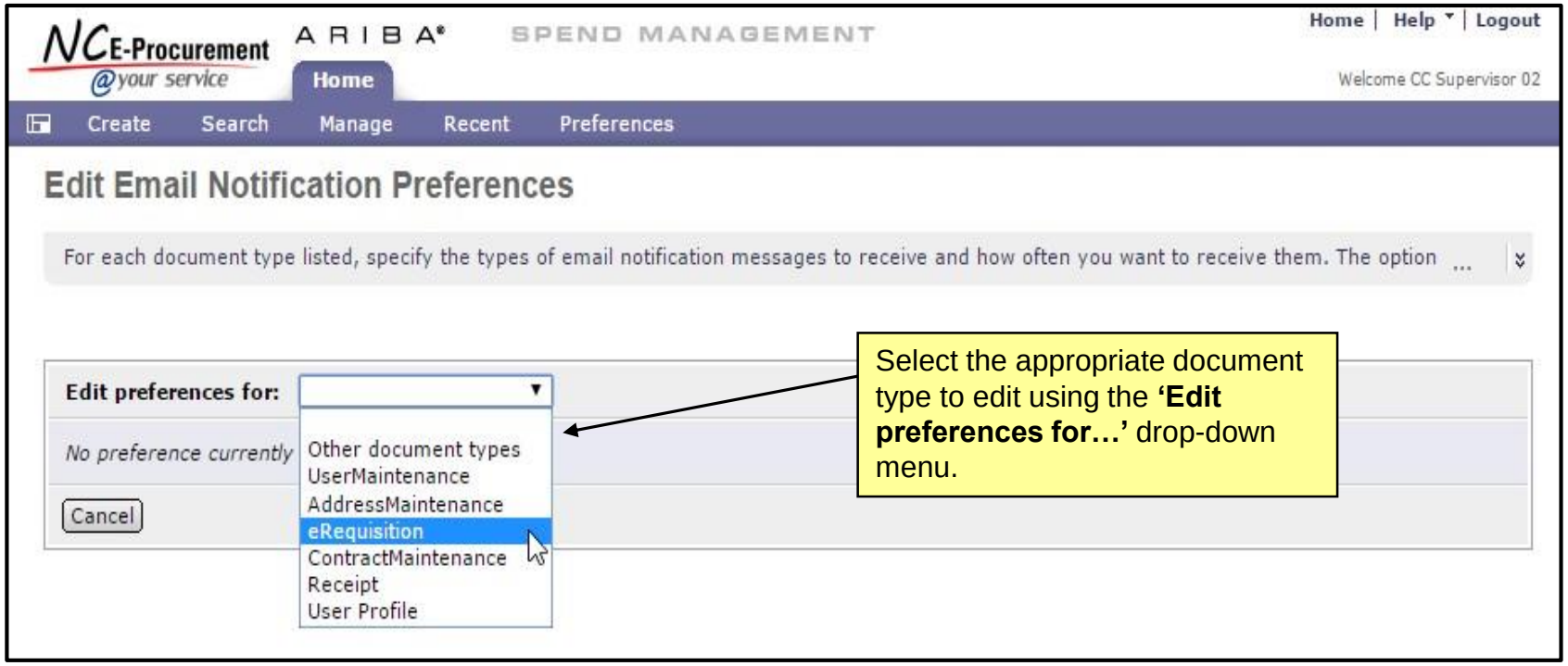
Manage Email Notifications

NC E-Procurement Tips & Tricks

MANAGE EMAIL NOTIFICATIONS



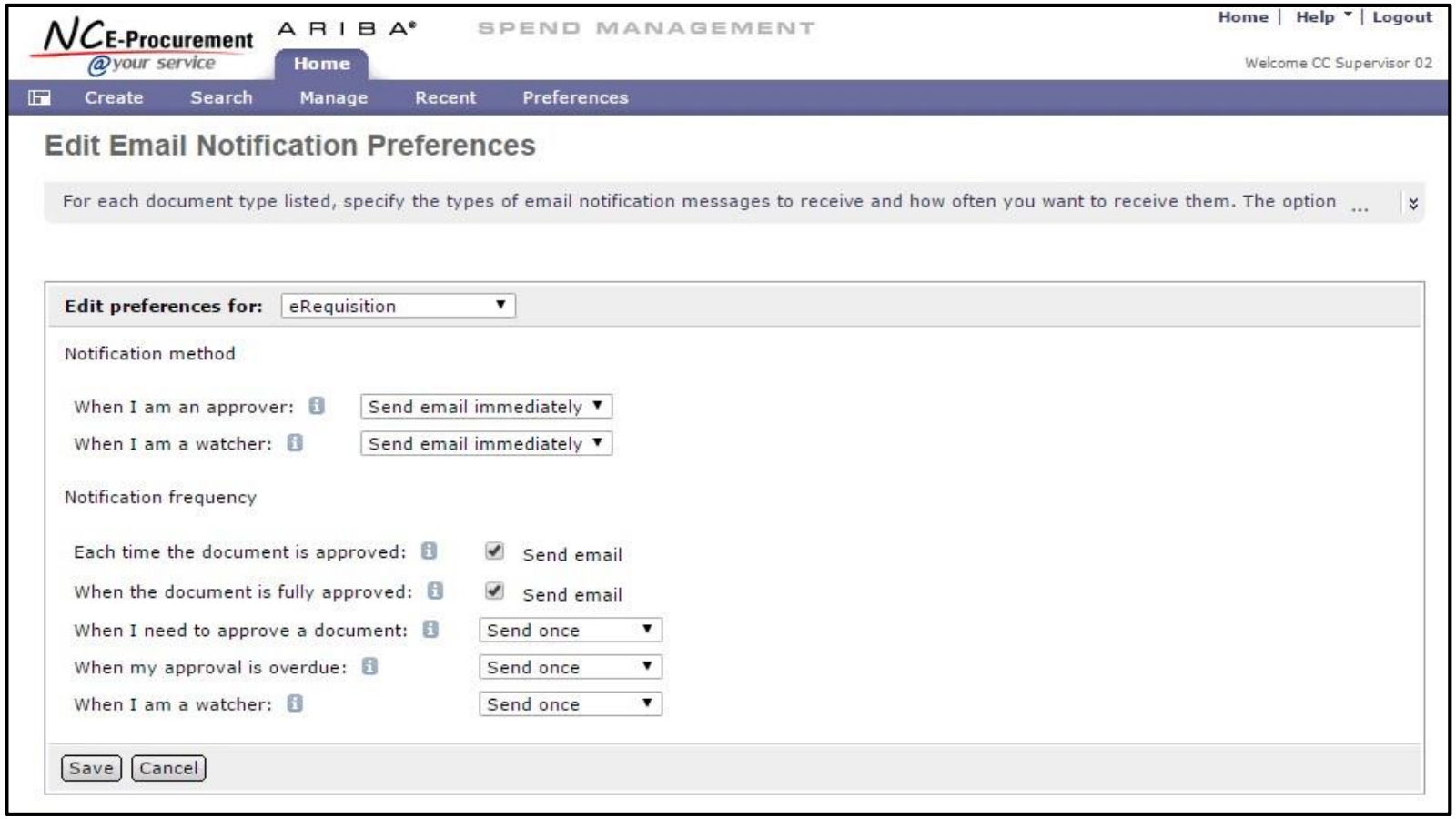
Open the **'Preferences'** drop-down menu on the Menu Bar and select **'Change email notification preferences.'**



Select the appropriate document type to edit using the **'Edit preferences for…'** drop-down menu.

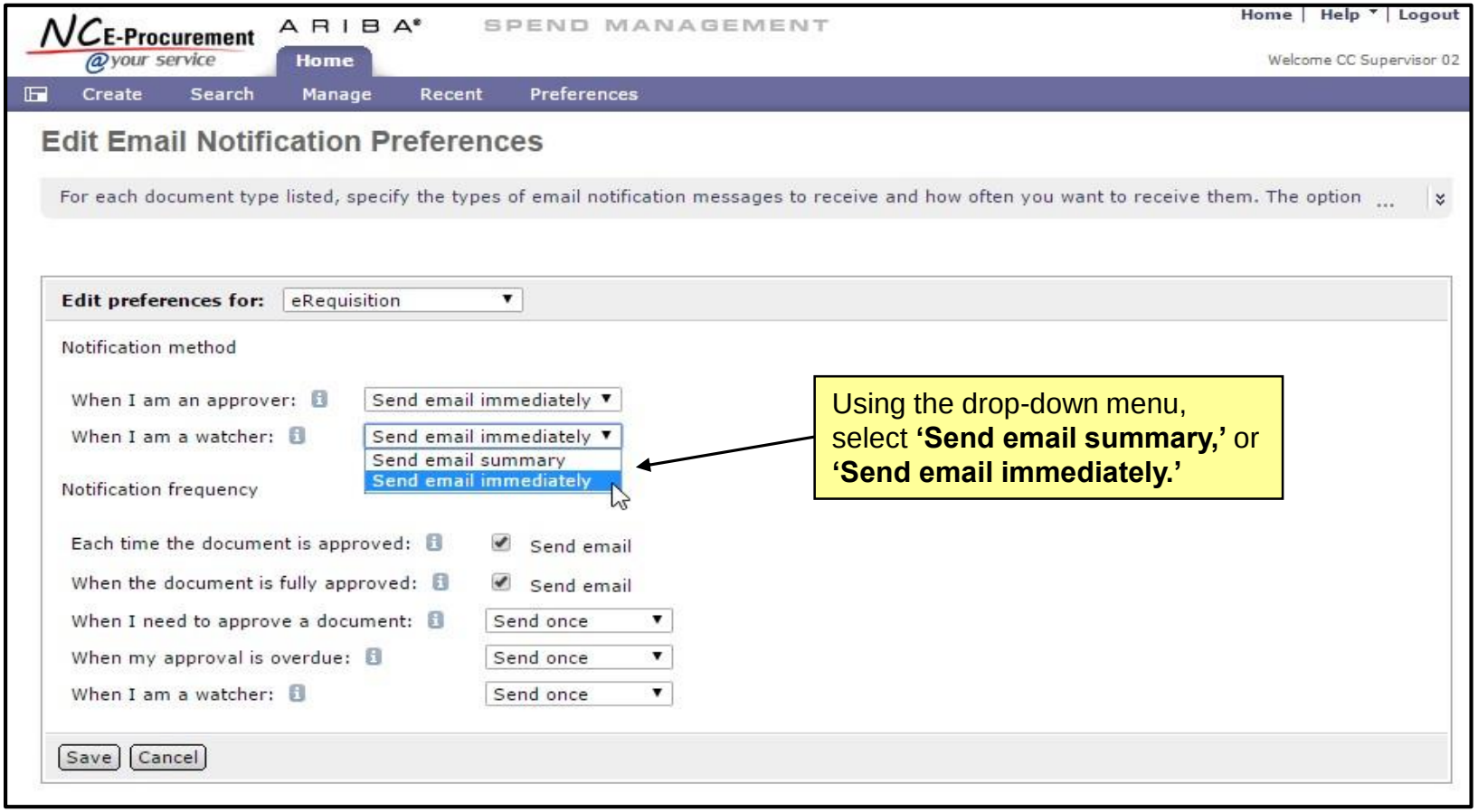
NC E-Procurement Tips & Tricks

MANAGE EMAIL NOTIFICATIONS

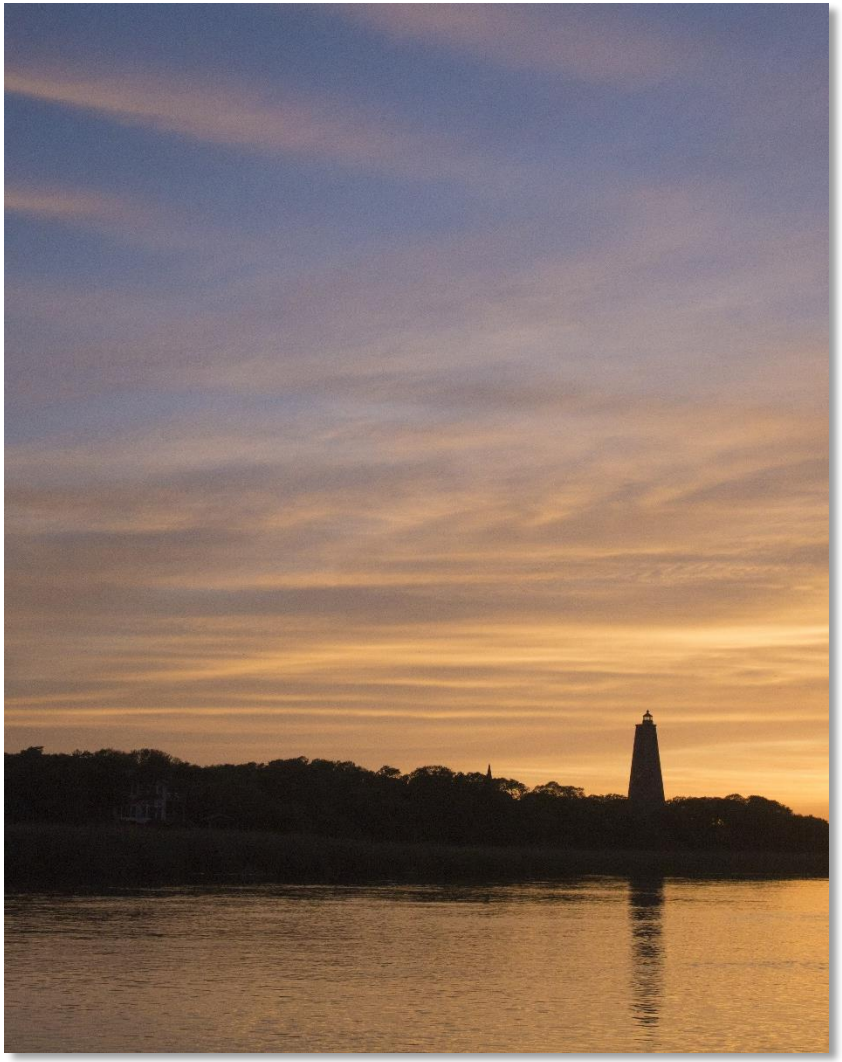


NC E-Procurement Tips & Tricks

MANAGE EMAIL NOTIFICATIONS



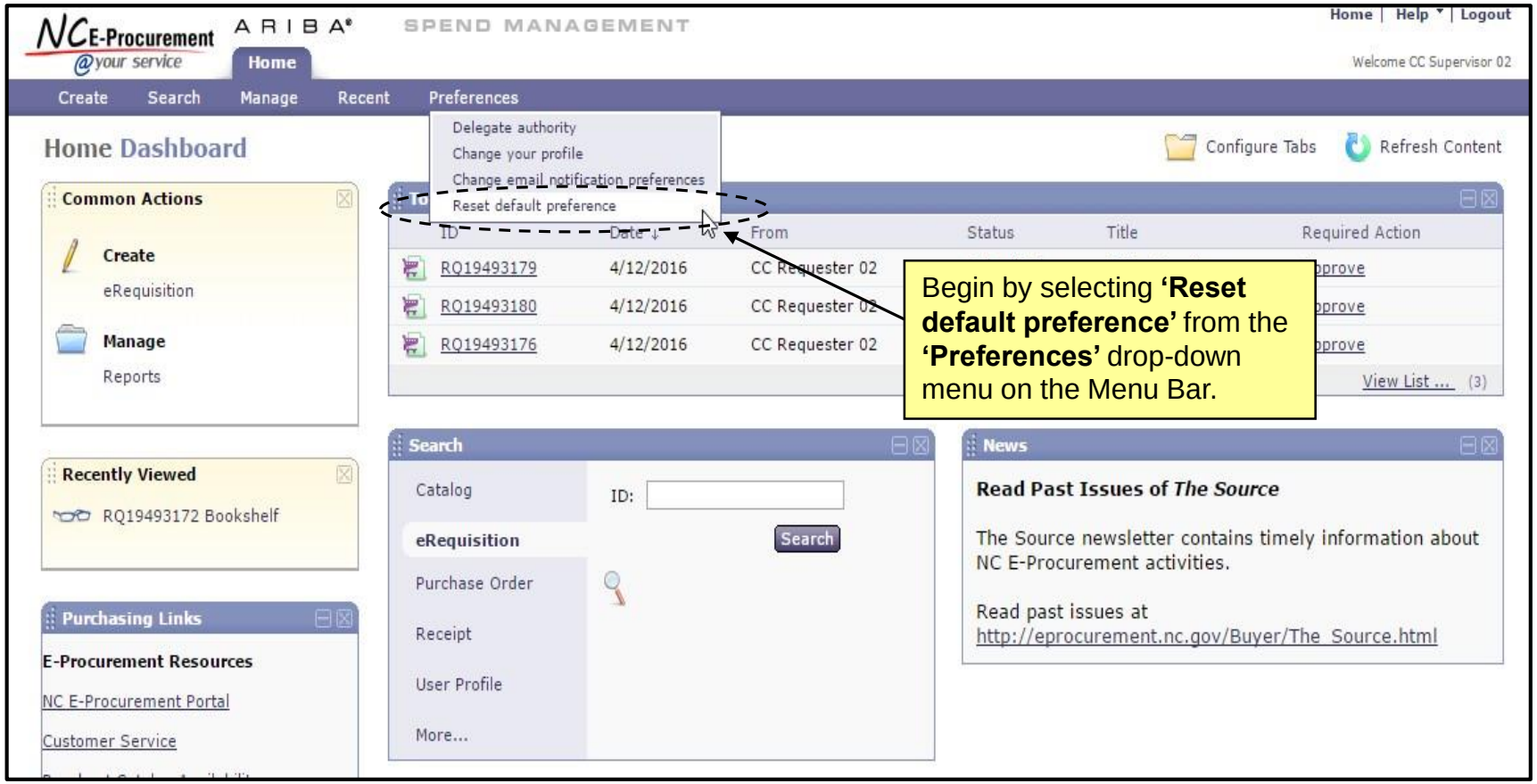
Using the drop-down menu, select **'Send email summary,'** or **'Send email immediately.'**



Reset Default Preferences

NC E-Procurement Tips & Tricks

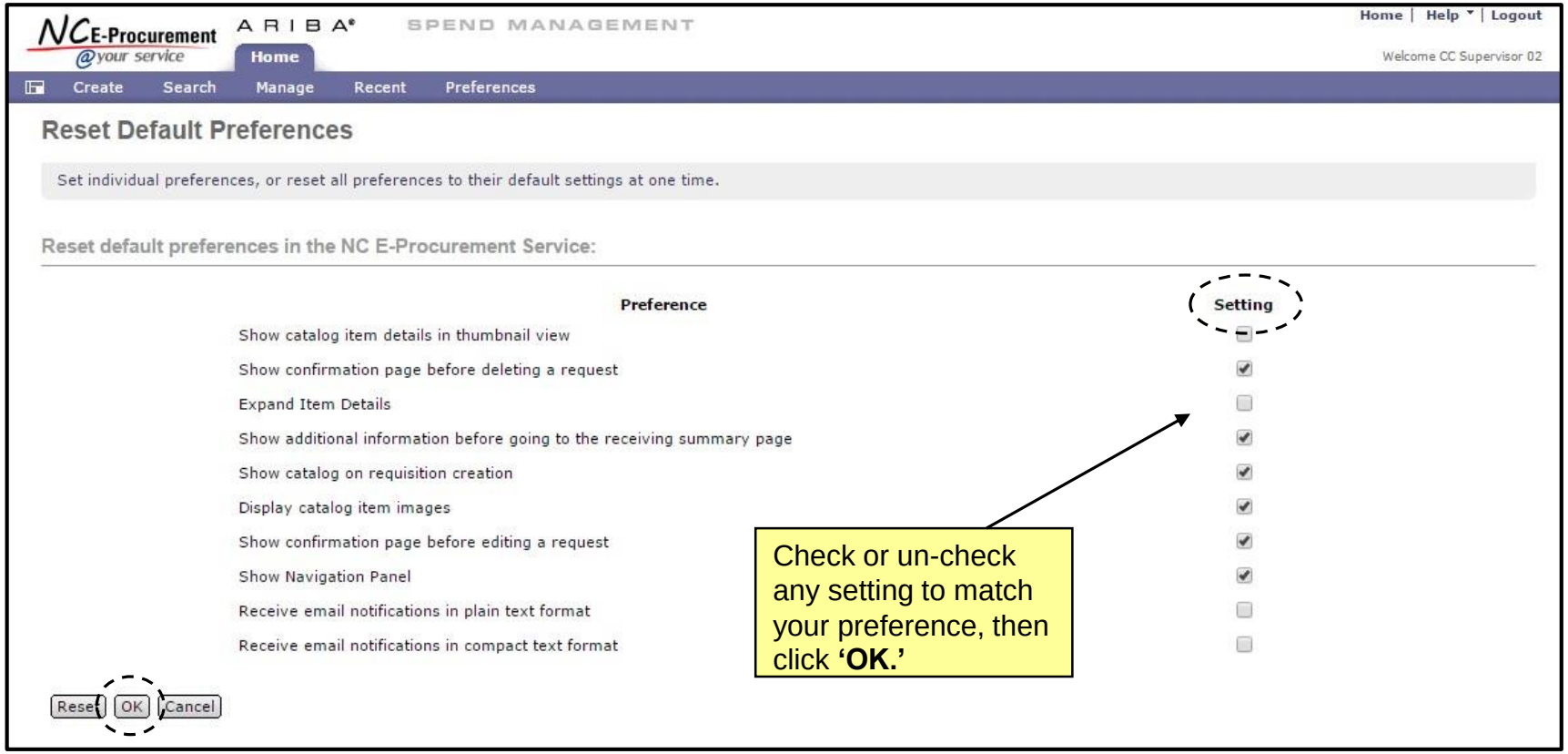
RESET DEFAULT PREFERENCES



Begin by selecting **'Reset default preference'** from the **'Preferences'** drop-down menu on the Menu Bar.

NC E-Procurement Tips & Tricks

RESET DEFAULT PREFERENCES



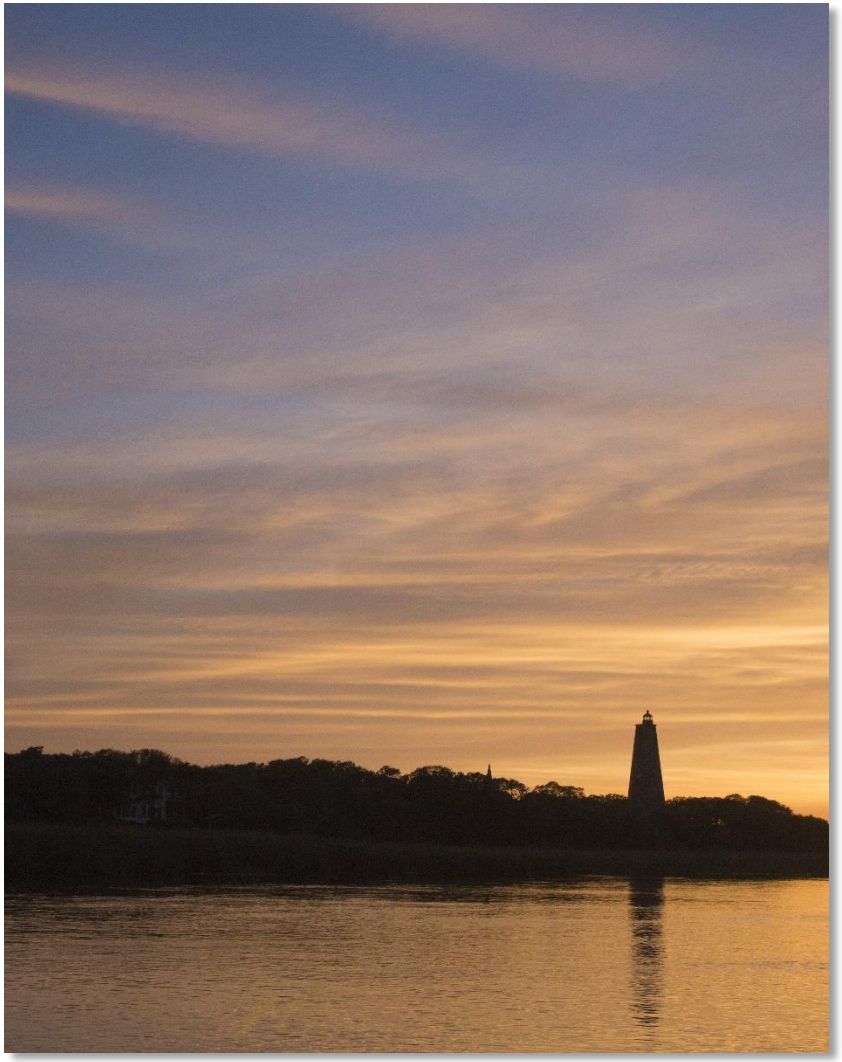
Check or un-check any setting to match your preference, then click **'OK.'**

NC E-Procurement Tips & Tricks

ADDITIONAL TIPS

What are a few NC E-Procurement processes of which you can take advantage?

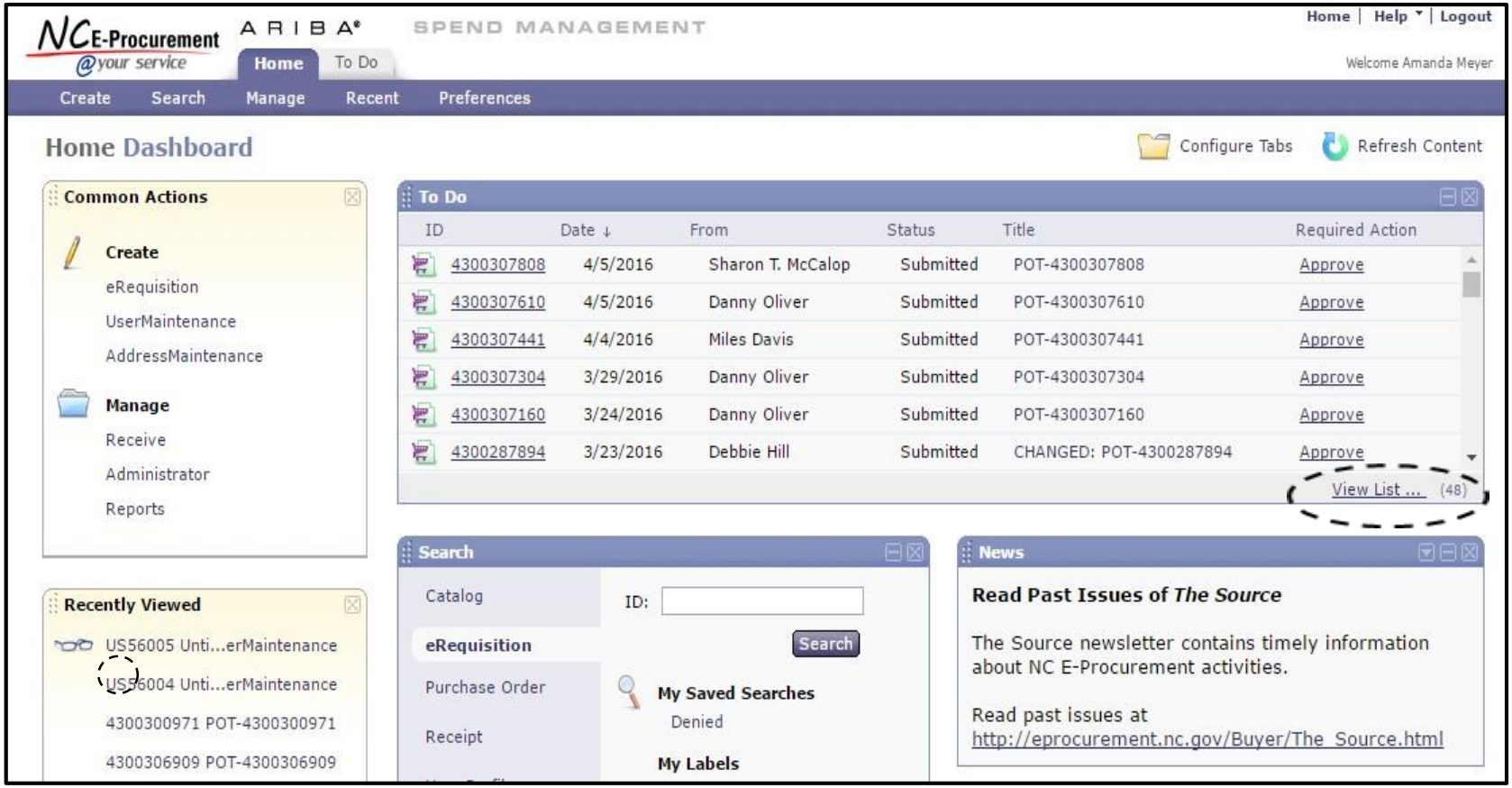
- Mass Approvals
- Archiving Watcher Notifications
- Adding Catalog Favorites
- Copying eRequisitions
- Searching by **'Originating System Ref. ID'** field



Mass Approve

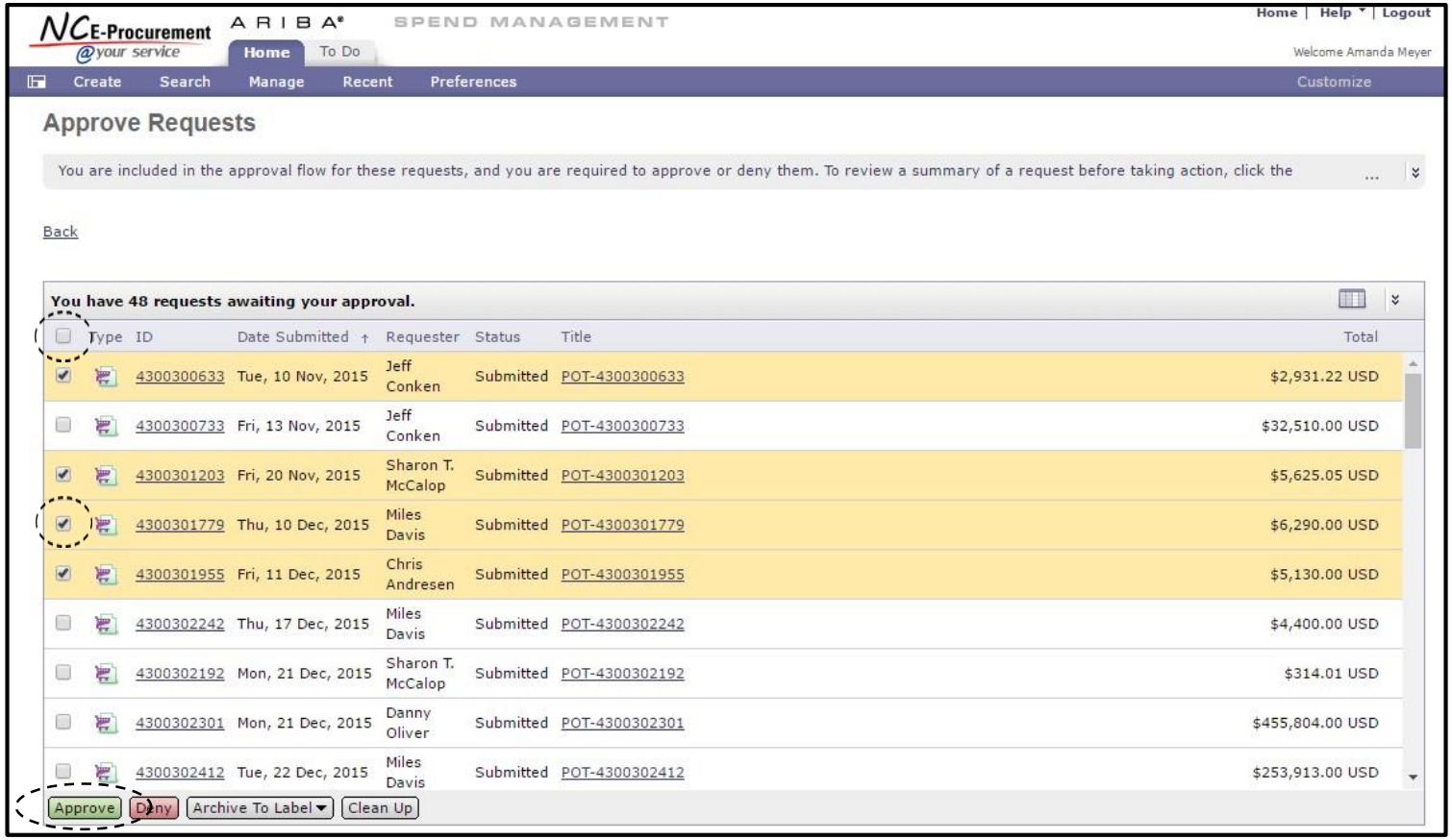
NC E-Procurement Tips & Tricks

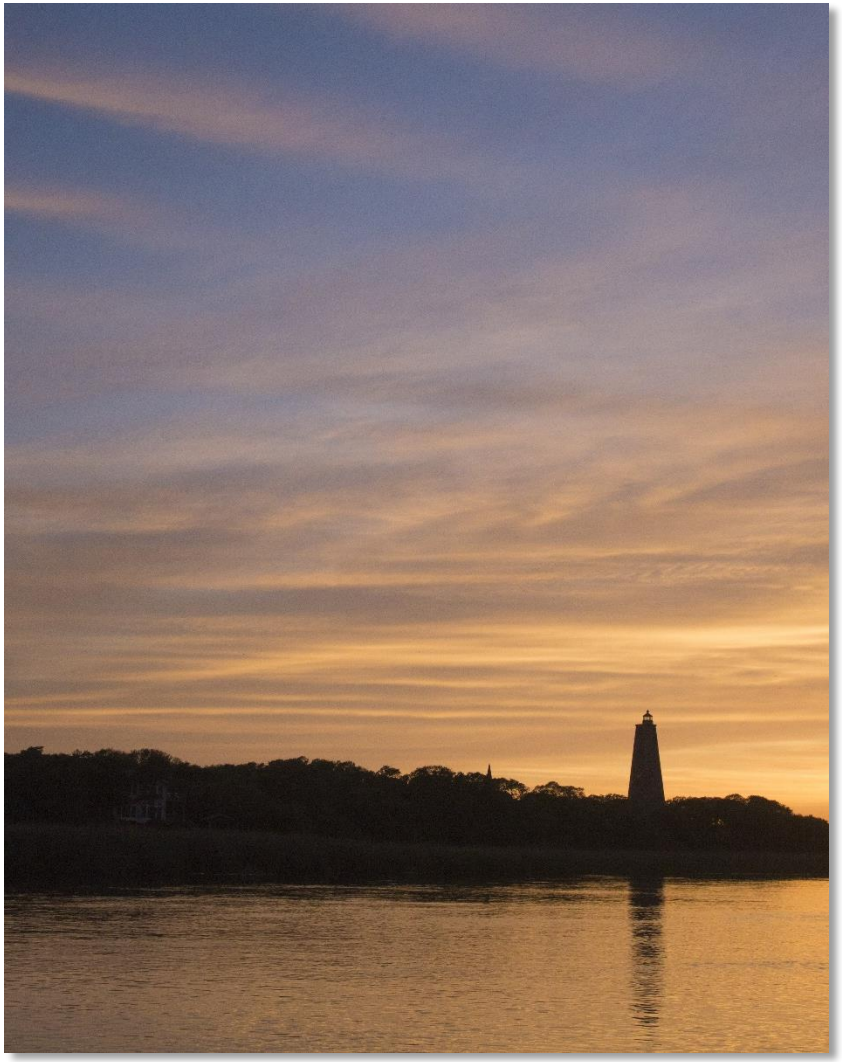
MASS APPROVE



NC E-Procurement Tips & Tricks

MASS APPROVE

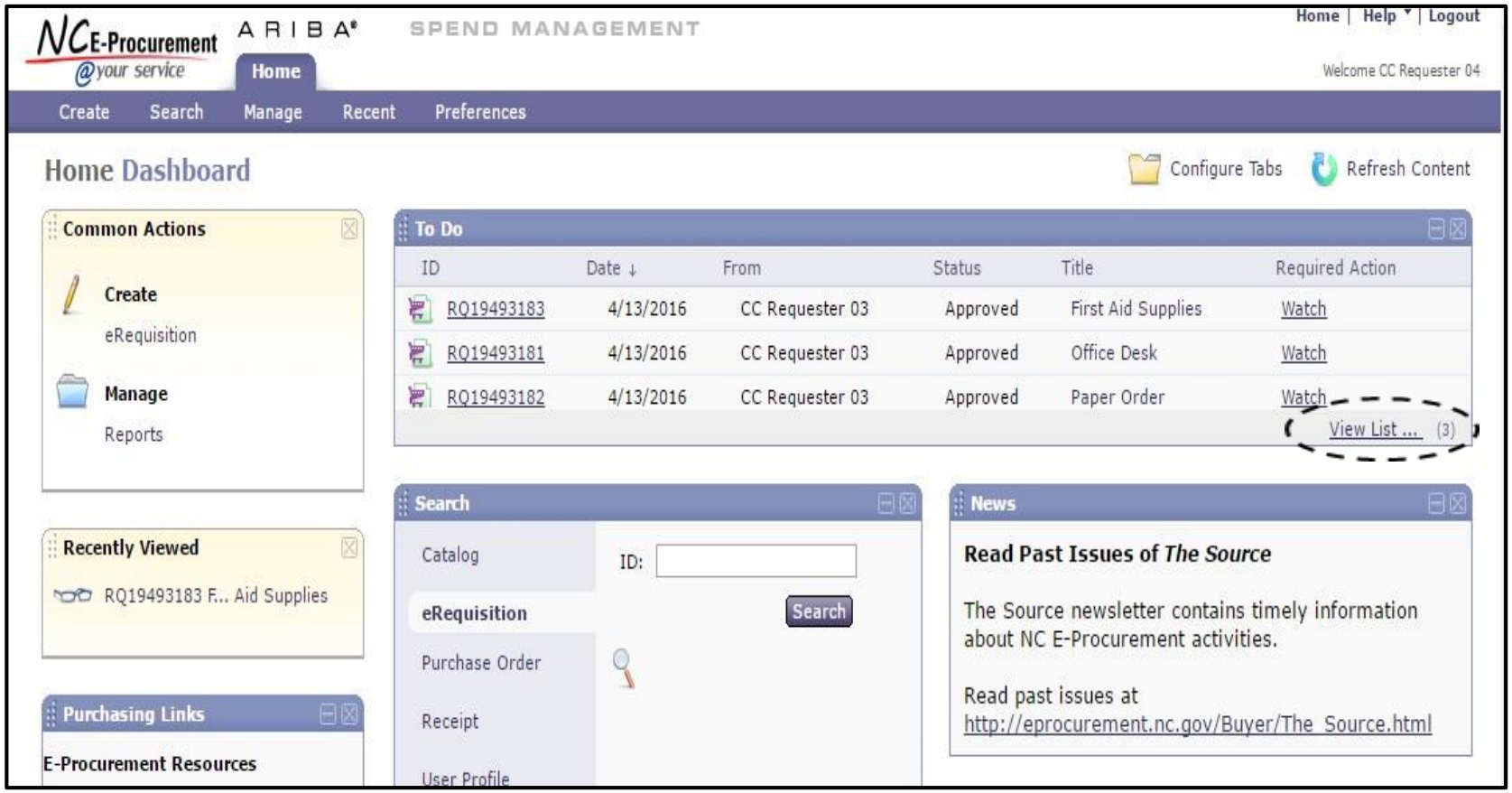




Archiving Watcher Notifications

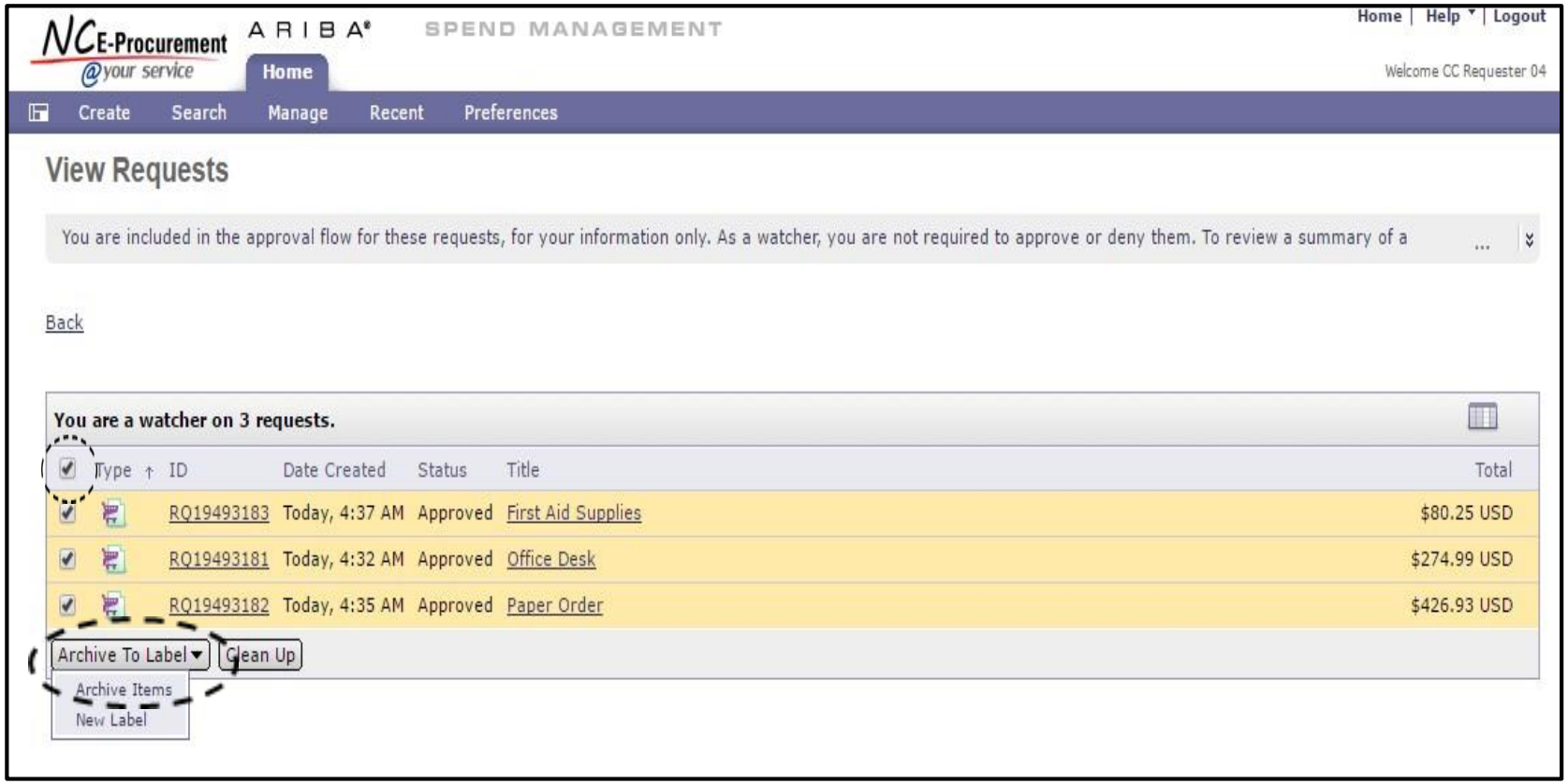
NC E-Procurement Tips & Tricks

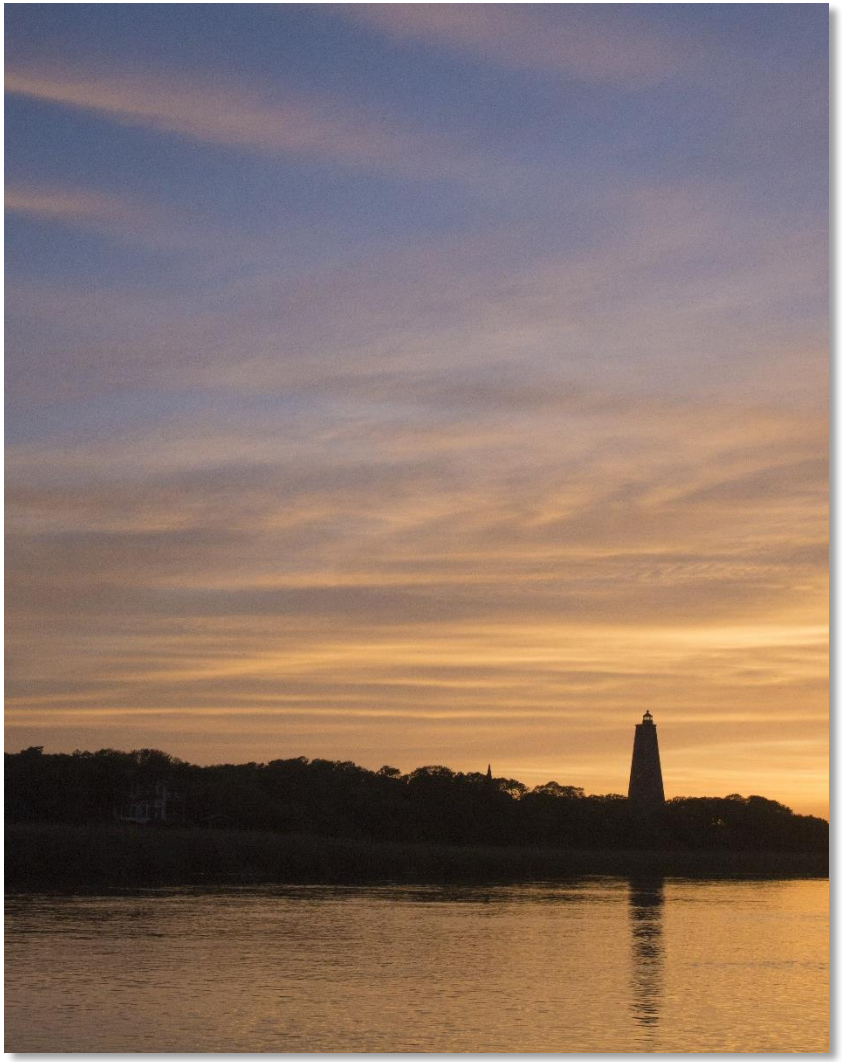
ARCHIVING WATCHER NOTIFICATIONS



NC E-Procurement Tips & Tricks

ARCHIVING WATCHER NOTIFICATIONS

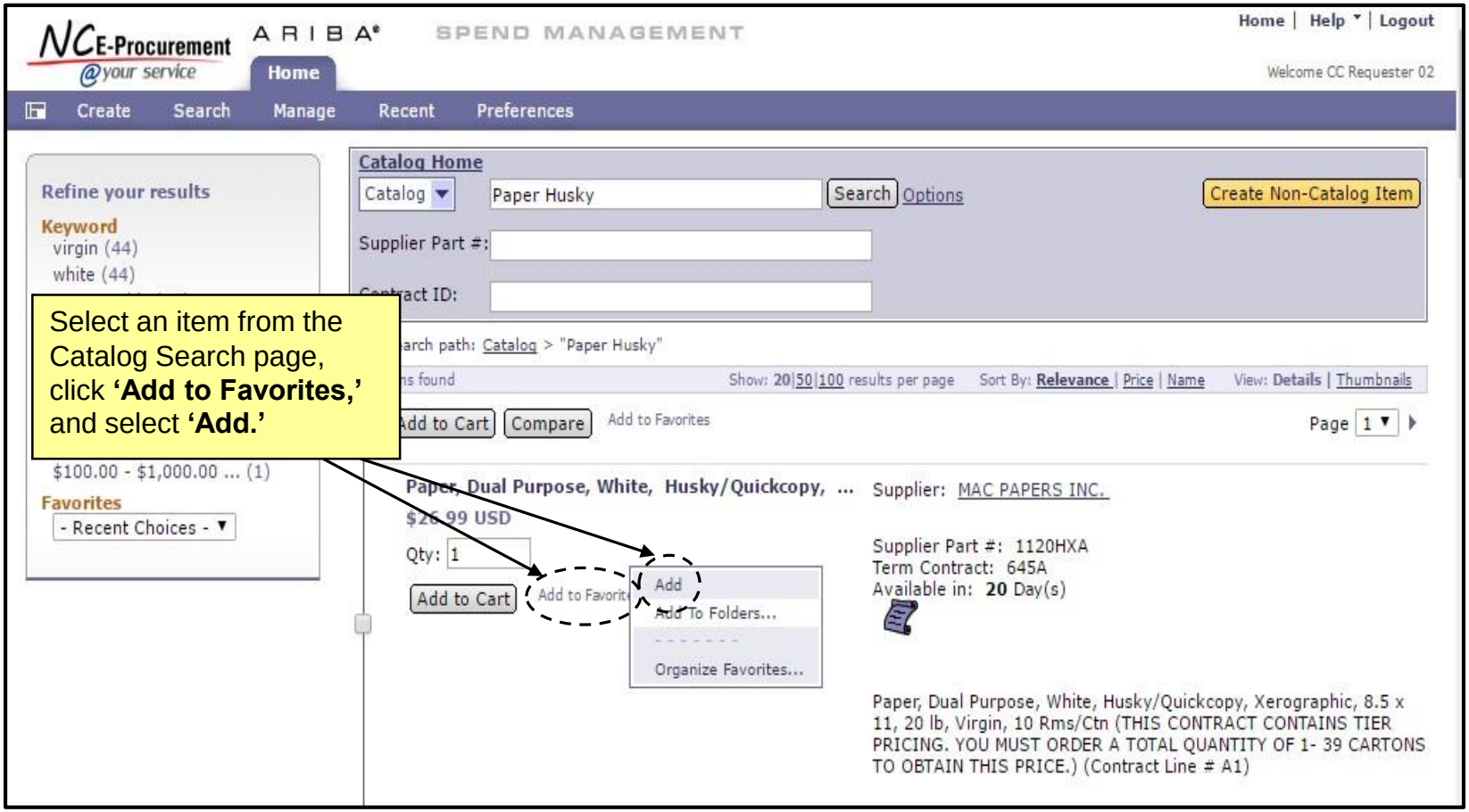




Adding Catalog Favorites

NC E-Procurement Tips & Tricks

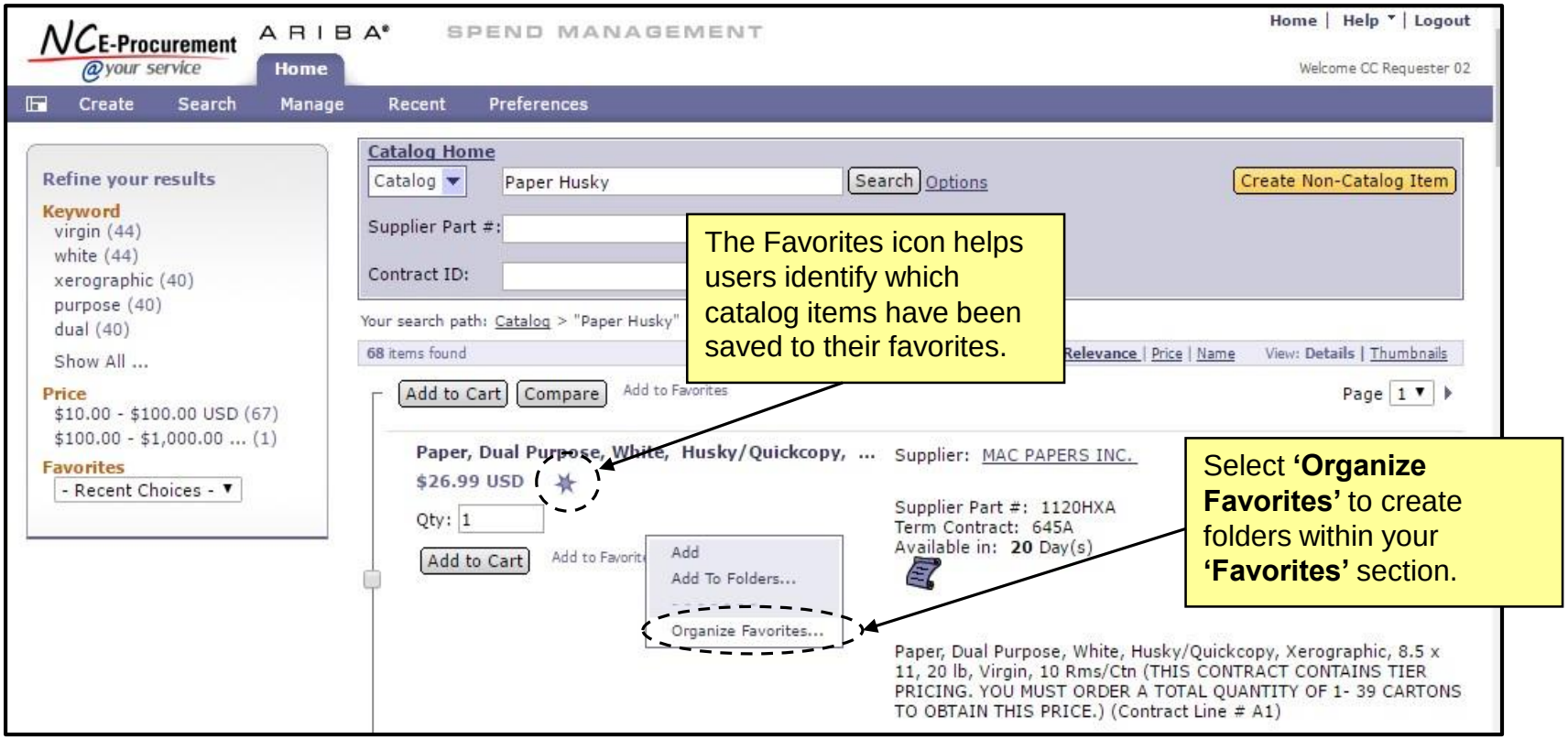
ADDING CATALOG FAVORITES



Select an item from the Catalog Search page, click **'Add to Favorites,'** and select **'Add.'**

NC E-Procurement Tips & Tricks

ADDING CATALOG FAVORITES

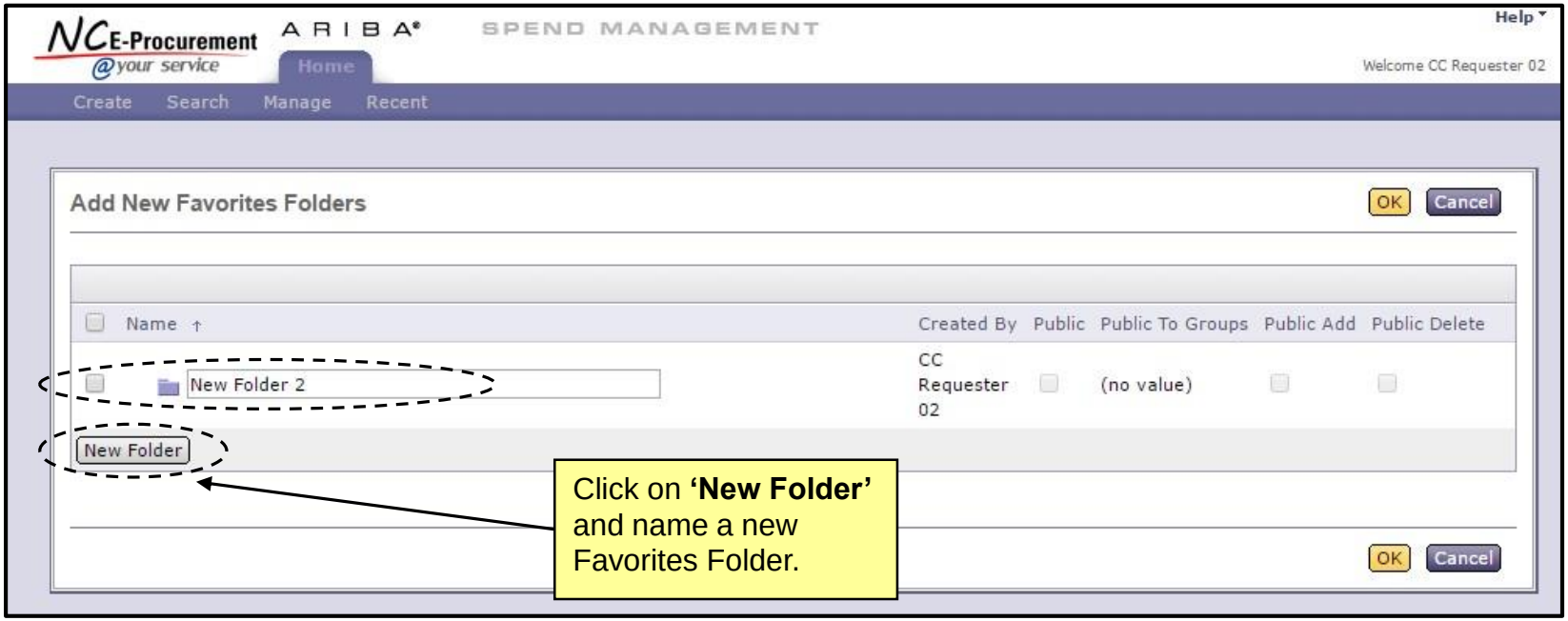


The Favorites icon helps users identify which catalog items have been saved to their favorites.

Select **'Organize Favorites'** to create folders within your **'Favorites'** section.

NC E-Procurement Tips & Tricks

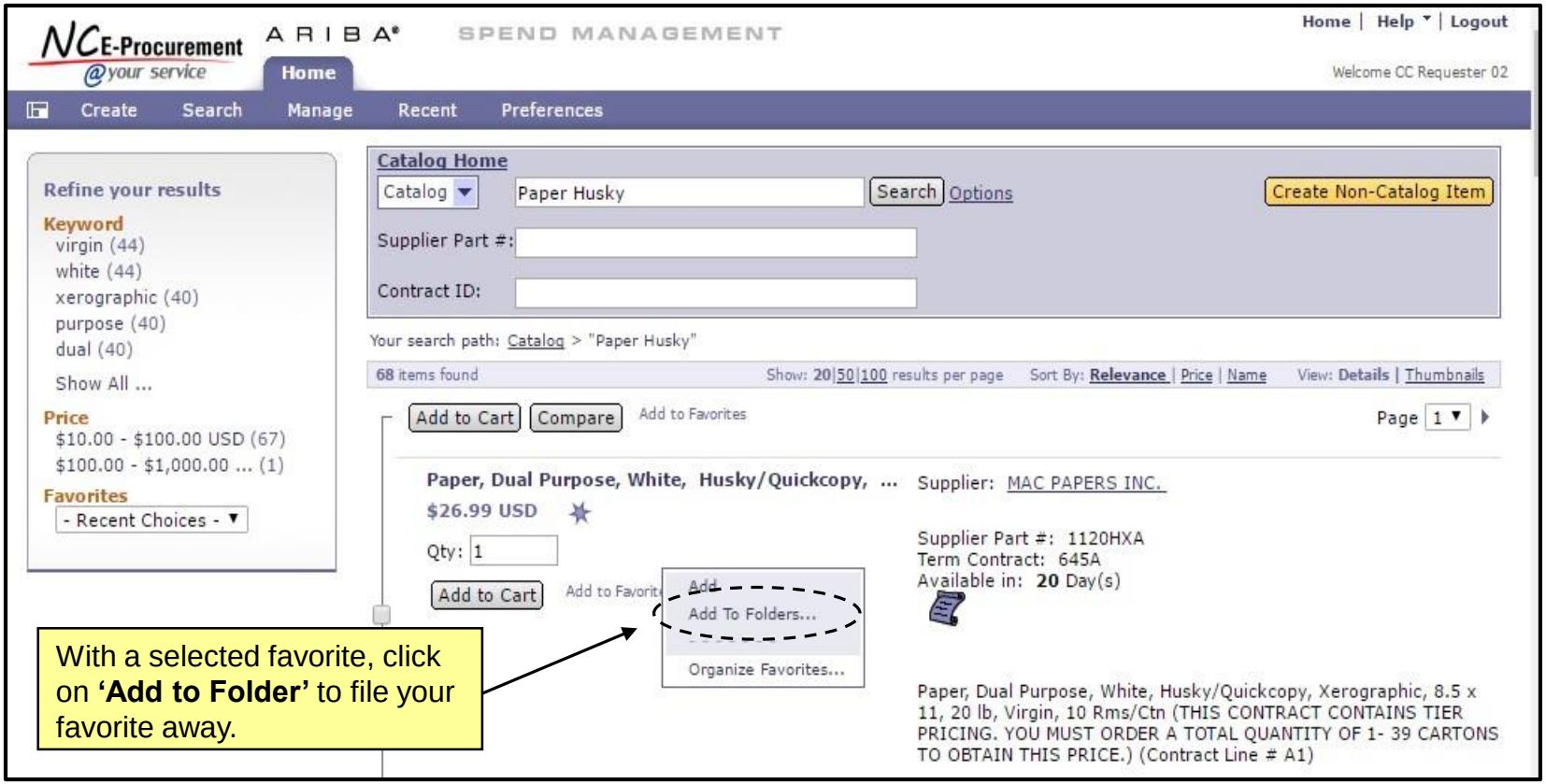
ADDING CATALOG FAVORITES



Click on **'New Folder'** and name a new Favorites Folder.

NC E-Procurement Tips & Tricks

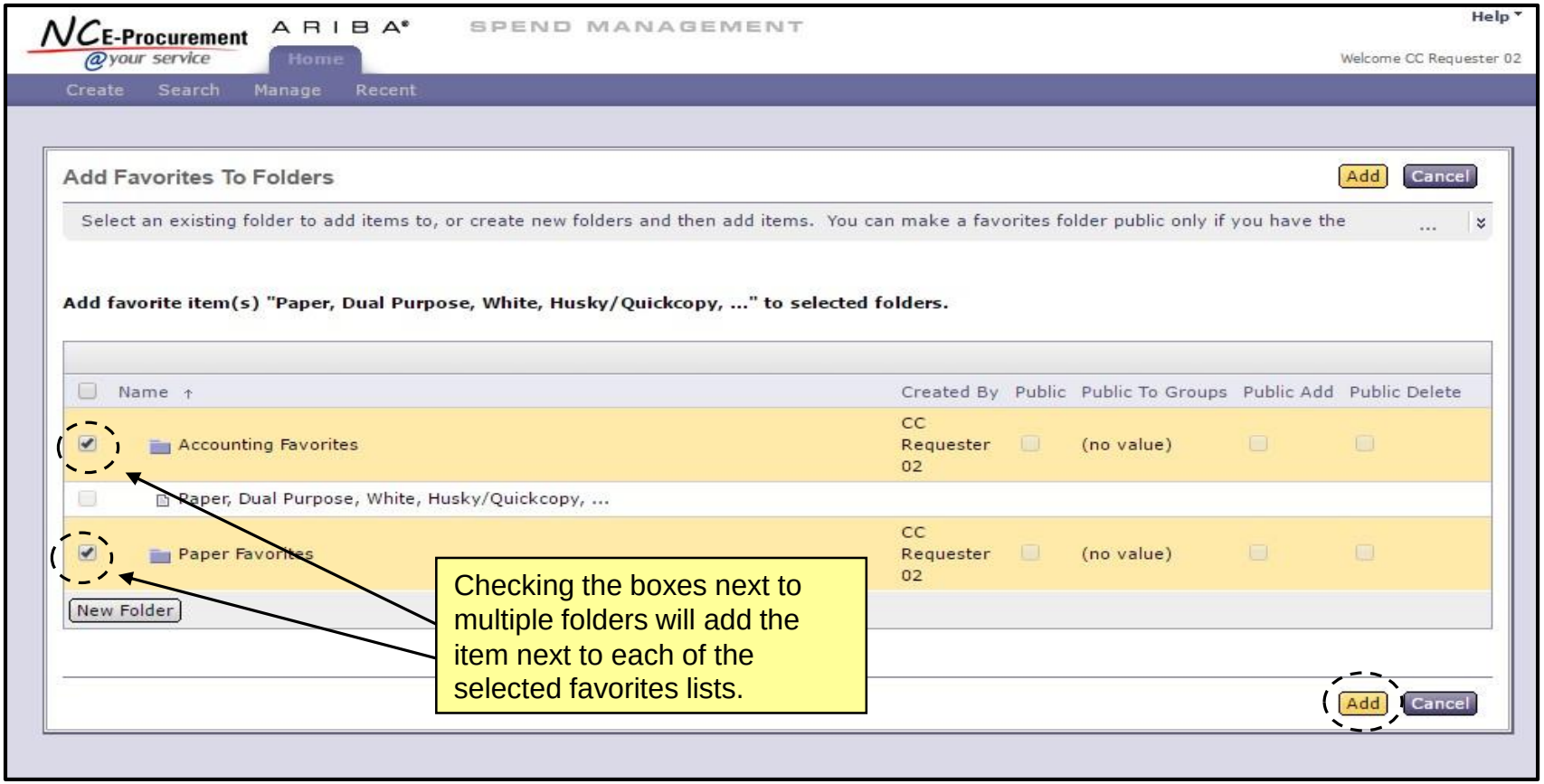
ADDING CATALOG FAVORITES



With a selected favorite, click on **'Add to Folder'** to file your favorite away.

NC E-Procurement Tips & Tricks

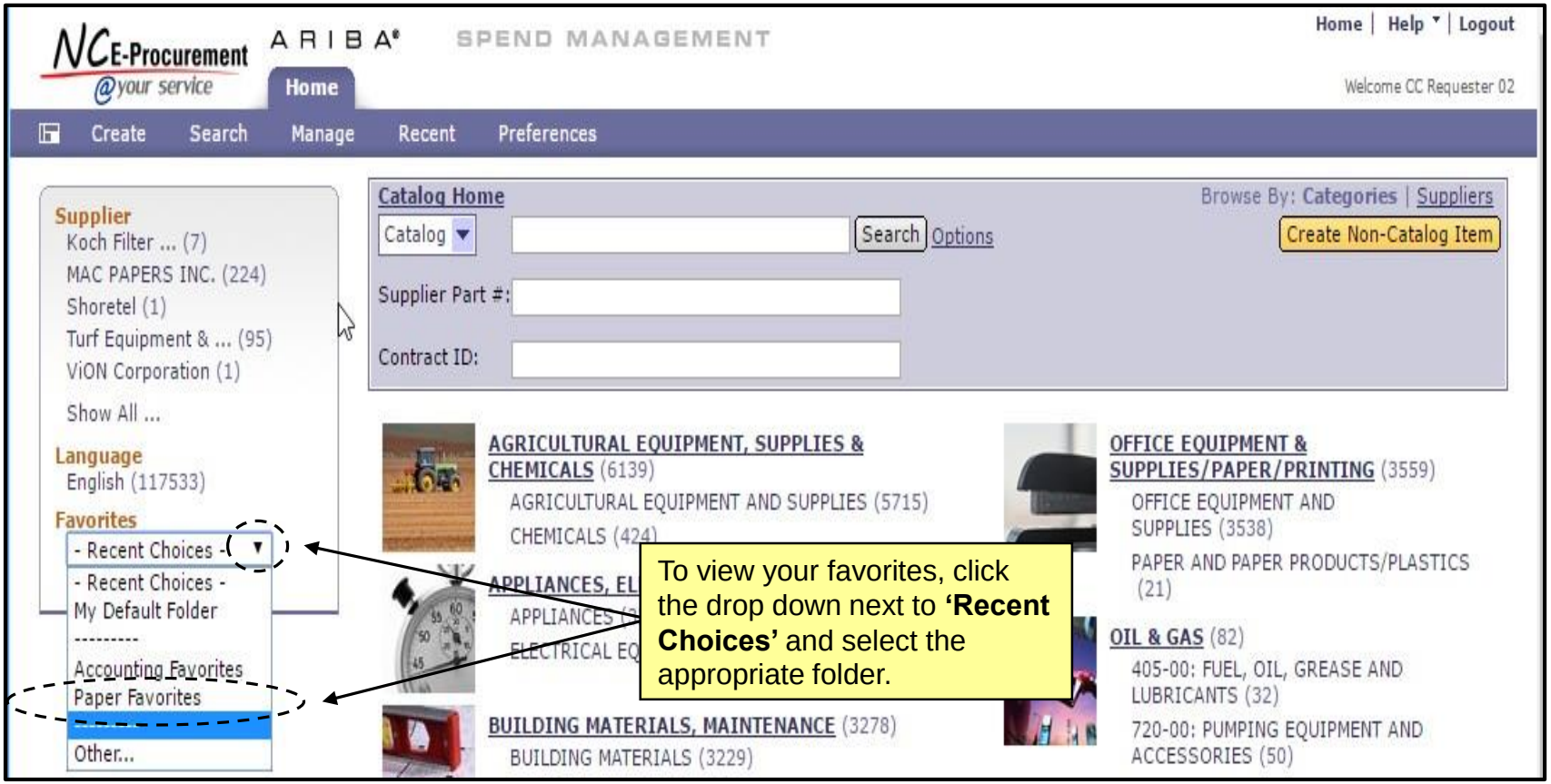
ADDING CATALOG FAVORITES

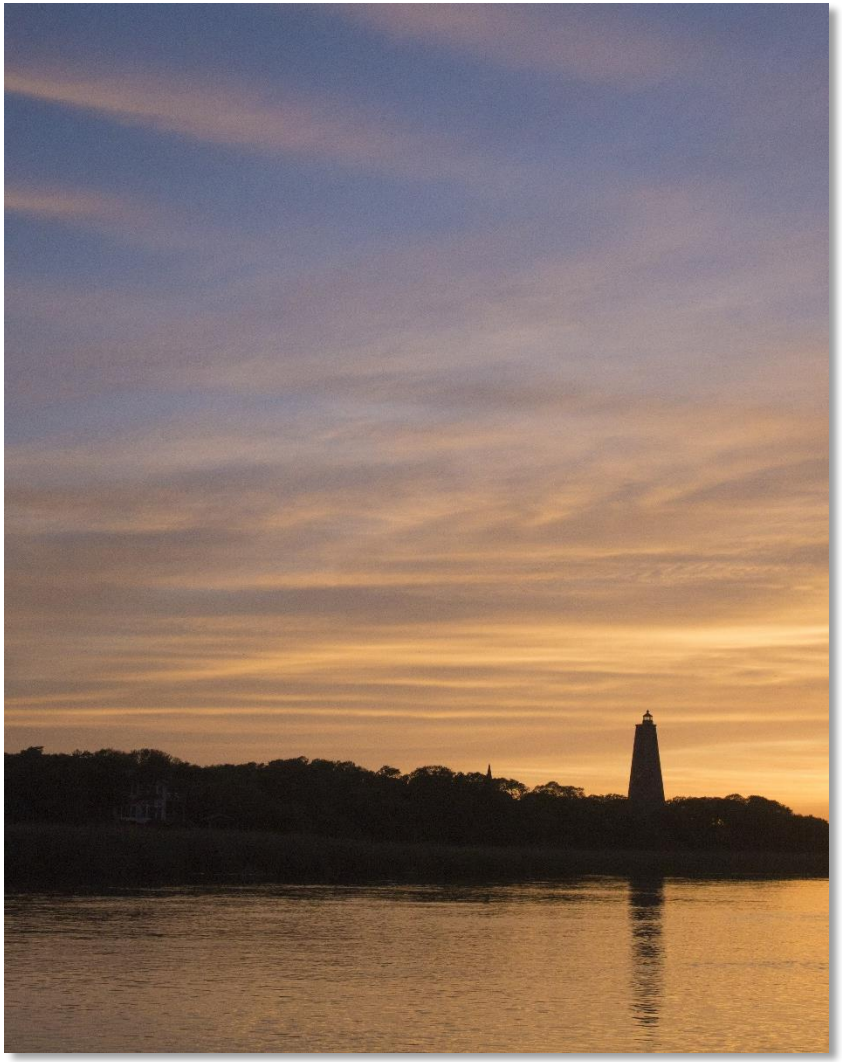


Checking the boxes next to multiple folders will add the item next to each of the selected favorites lists.

NC E-Procurement Tips & Tricks

ADDING CATALOG FAVORITES

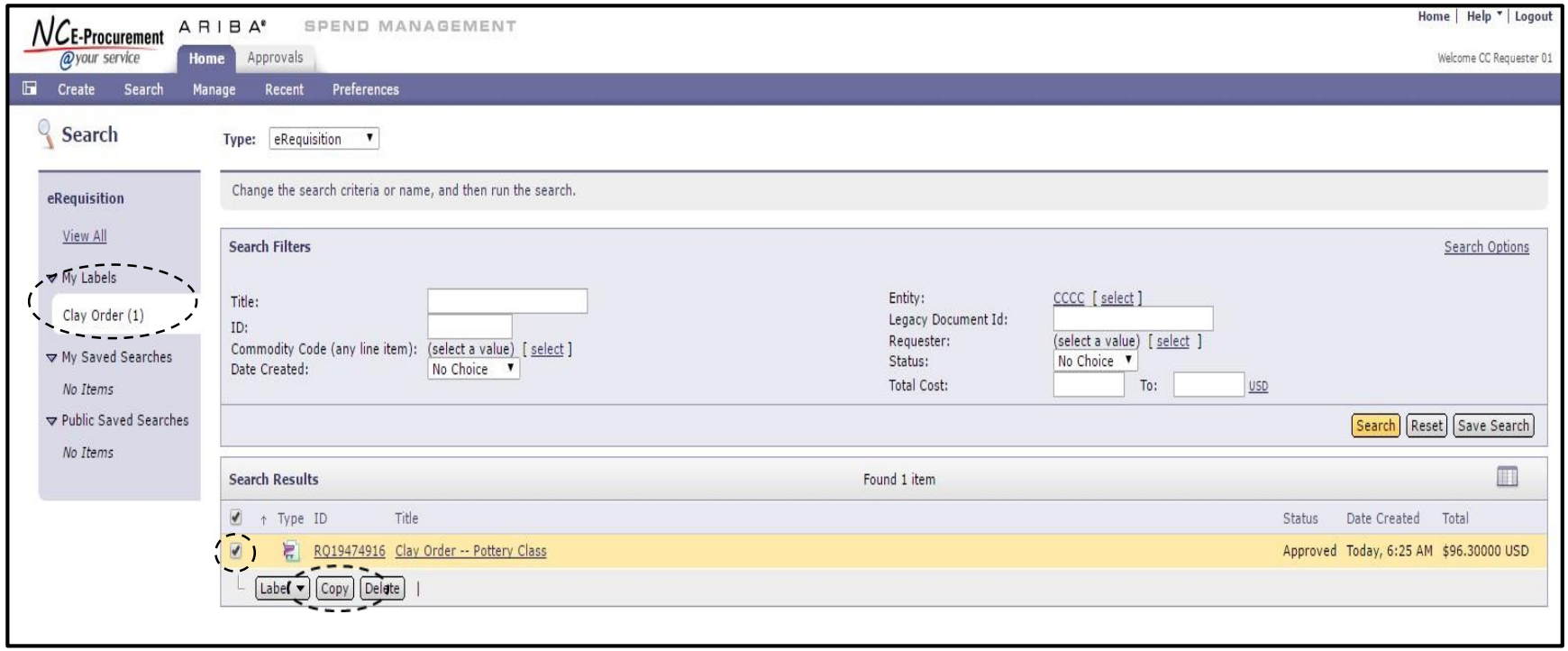




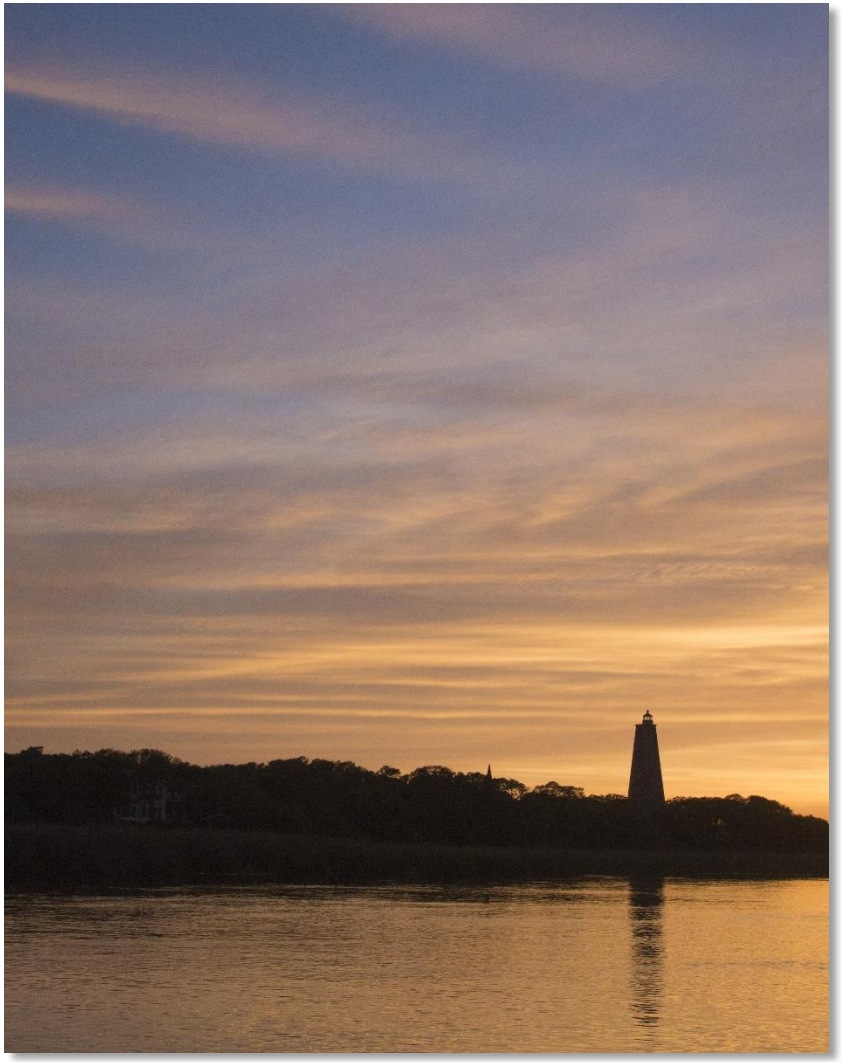
Copying eRequisitions

NC E-Procurement Tips & Tricks

COPYING eREQUISITIONS



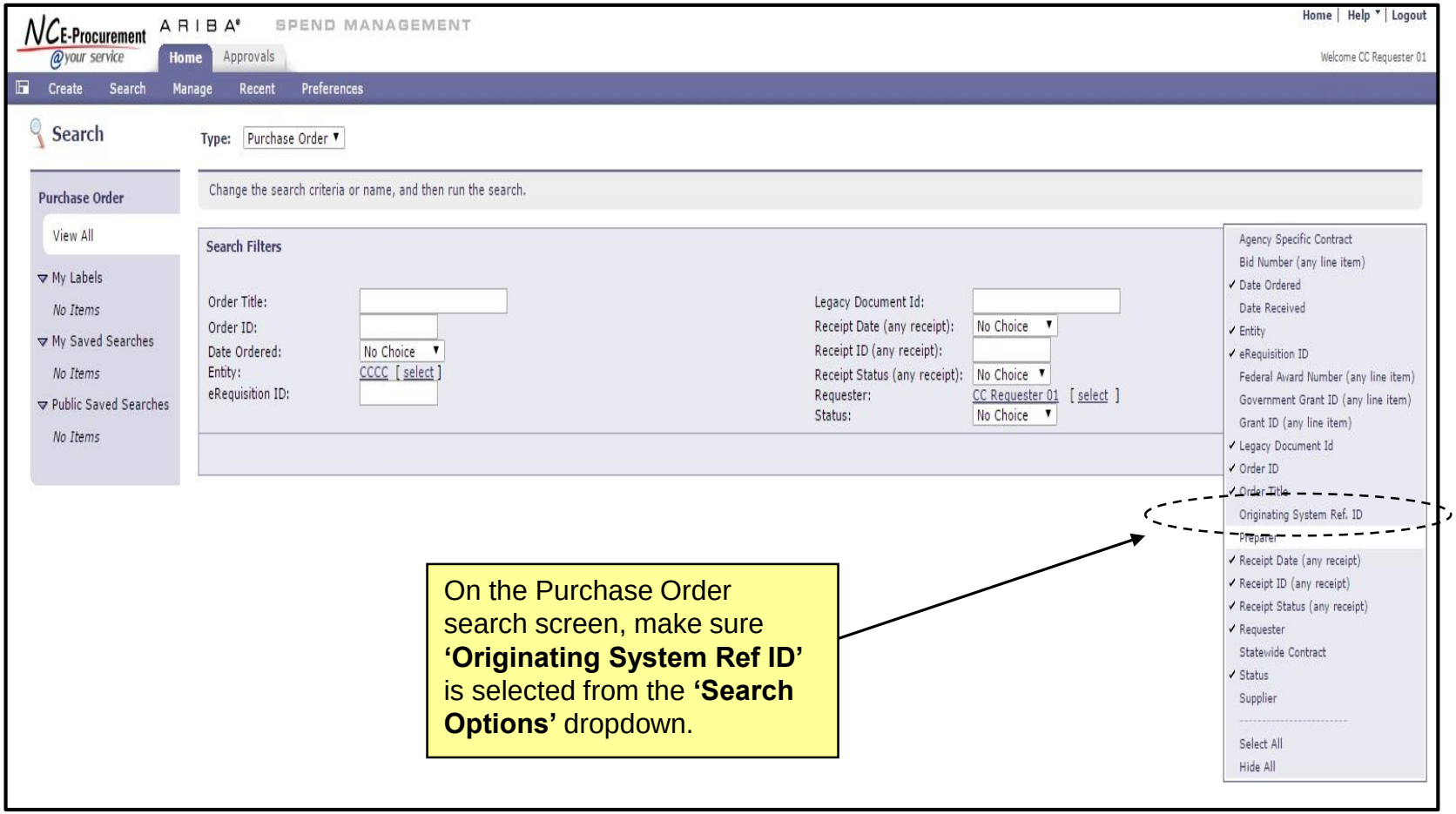
- Punchout Catalog and eQuote eRequisitions are not able to be copied.



SEARCHING BY ***'ORIGINATING SYSTEM REF. ID'***

NC E-Procurement Tips & Tricks

SEARCHING BY 'ORIGINATING SYSTEM REQ. ID'



On the Purchase Order search screen, make sure **'Originating System Ref ID'** is selected from the **'Search Options'** dropdown.

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C: 919-423-3173