



## The Source NC E-Procurement Newsletter

December 2016 Edition

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**Holiday Reminder: Delegate Your Authority** Taking off for the holidays? Be sure to delegate your approval authority so your agency can still purchase what it needs in your absence.

A delegation of approval authority is a temporary change, typically set up to handle any approvals when the original approver is out of the office. The delegation of approval authority allows another user, the “delegatee,” to approve or deny items on behalf of another user, and can be set up at any time from any computer with Internet access.

For additional information on delegating approval authority, including detailed steps for setting up a delegation, please view the “Delegating Approval Authority” job aid located on the NC E-Procurement [User Training page](#) as well as the [Web-Based Training Courses page](#) by selecting the “Approving” training course.

**P&C’s Training Roundup** The Division of Purchase & Contract (P&C) offers various training courses related to procurement throughout the year. Please see below for a list of upcoming trainings.

DATE	COURSE TITLE	LOCATION	FACILITY & ADDRESS
01/04	E-Procurement	Raleigh	Wake Tech’s Public Safety Education Campus (PSEC) 321 Chapanoke Road, Room 1401
01/05	eQuote	Raleigh	Wake Tech’s Public Safety Education Campus (PSEC) 321 Chapanoke Road, Room 1401
1/10-1/12	NIGP: Contract Administration in the Public Sector	Raleigh	Dept. of Administration 116 W. Jones St., HRM Training Room, 2 <sup>nd</sup> Floor
1/17-1/19	NC Procurement	Raleigh	NC Works Training Center 313 Chapanoke Road, Suite 140
1/24	Specification Writing	Raleigh	Statewide IT Procurement 3900 Wake Forest Road
1/25-1/26	RFP Development & Evaluation	Raleigh	Statewide IT Procurement 3900 Wake Forest Road

**Tips & Tricks: Approval Flows** Approval flows are an integral part of the purchasing process. To learn more about approval flows and how they work, take a look at the frequently asked questions below.

***How are approval flows generated and why are certain users automatically added?***

Approval flows are generated by the system based on several determining factors. One of these is the user’s designated management level, or amount they are allowed to purchase before a supervisor is added to their eRequisition approval flow. Some state agencies also have approval flows generated based on the commodity code selected for the item on the eRequisition (e.g., IT commodity), as well as requiring approvers such as the financial approver and the chief procurement officer be put in the approval flow. The approval flow for an

eRequisition can be seen on the approval flow tab on the **Summary** page. Users cannot modify their standard approval flow, but are able to add additional approvers that are not automatically populated in the approval flow.

***How do I remove an approver from an approval flow?***

You can only remove approvers that you have manually added. To do this, access the approval flow from your eRequisition. Once there, click “Delete Approver.” Next, click the radio button adjacent to the user you’d like to delete, and click “OK.” The approval flow will now be updated and the selected approver will no longer appear. If an approver was automatically added to the approval flow, you will need to speak with your security administrator about updating your management level or supervisor if the individual should not appear.

***How can I add an approver to the approval flow automatically?***

Approvers are added automatically based on a user’s management level and any additional approval rules set by their entity. A security administrator will need to update management levels and supervisors to have a user be automatically added into an approval flow.

## **Follow-Up**

This newsletter was sent to all NC E-Procurement users.

Questions about information covered in this newsletter? Send an email to: [ephelpdesk@its.nc.gov](mailto:ephelpdesk@its.nc.gov)