



## The Source NC E-Procurement Newsletter

May 2018 Edition

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### End of Year: Closing Outstanding Purchase Orders

As your accounts payable department prepares for the year end by closing outstanding purchase orders, remind them to take advantage of the option to **not** transmit changes to the supplier when changing a purchase order. When a change is made against an existing order in SunPac, a pop-up box asks the user if they want to transmit the change to the supplier. If **'No'** is selected, the change order is sent to NC E-Procurement but **not** to the supplier. When using the **'Multi PO Cancel'** option, enter **'N'** in the **'Reprint Canceled POs'** field to flag the purchase order to **not** be transmitted to the supplier. This feature helps to avoid duplicate shipments.

**Note:** You may receive email confirmation from the NC E-Procurement Service once the change order has been successfully imported, but it will state that the purchase order has not been transmitted to the supplier.

### End of Year: Setting Up SunPac (FY19) for NC E-Procurement

The **Vendor Import**, **Requisition Import**, and **Post Payments** batch jobs must be manually created for FY19.

For the Requisition Import and Post Payments batch jobs, set the FY19 jobs to run 5 minutes after the FY18 jobs so that the FY18 and FY19 jobs do not conflict (e.g., if the Requisition Import is set to run at 5 a.m. in FY18, set it to run at 5:05 a.m. for FY19). If you do not want to receive the reports for both FY18 and FY19, be sure to set the printer option to **'NONE'** when setting up the FY19 batch jobs. When your school system is ready to stop using FY18, the batch jobs for FY18 should be deleted by accessing the **WRKJOBQ** folder.

The Vendor Import batch job does not require FY18 and FY19 batches. Cancel the FY18 batch job and recreate the Vendor Import batch job for FY19.

**Note:** The batch jobs listed in this queue do not list the associated fiscal year. These batch jobs are listed on the screen with the oldest at the top and the most recent at the bottom. Delete the top choice for each job listed.

Verify the following FY19 screens contain the required NC E-Procurement information:

- Security Authorizations (System File > Option 5)
- PO Process and Run Controls (System File > Option 22 > F5 to go to 2nd screen > F5 to go to 3rd screen)
- Ship To Addresses (System File > Option 29)

Purchasing Parameters (System File > Option 32 > Option 6)

### Tips & Tricks: Selecting the Correct Location for Vendors on Line Items

When creating a line item within NC E-Procurement, consider the location for the vendor you are selecting. Sometimes vendors have multiple locations, and either the closest location or the location that provides the good or service you are purchasing must be selected. Follow the instructions below for selecting a vendor location.

1. Check the box next to the line item to be updated and click **'Edit.'**

**Note:** If you need to update the same vendor location for multiple line items, use the Mass Edit feature by clicking the checkbox next to each line item that needs to be updated before clicking **'Edit.'**

RQ2127244: Untitled Requisition

Review your requisition, make changes as necessary, and submit the request for approval.

**Summary** | Approval Flow

Title:

On Behalf Of:

My Labels:

Line Items (3)	No.	Type	Description	Supplier Part Number	Qty	Unit	Tax	Other	Price	Amount
<input checked="" type="checkbox"/>	1		62XL Printer Cartridge		1	each	\$0.00	\$0.00	\$0.00 USD	\$0.00000 USD

Supplier: SYSTEM BUSINESS EQUIPMENT CO.  
 Location: SYSTEM BUSINESS EQUIPMENT CO.  
 Commodity Code: 203-72 - Printer Accessories...

Account Code:

|

Total Cost: \$0.00000 USD

2. Click the 'select' link next to the 'Location' field.

RQ2125749: Select Vendor Location

This is a summary of the item you selected. Change any editable field and save your changes.

**LINE ITEM DETAILS**

No.: 1

Description:

Qty:

Unit:

Commodity Code:

Amount: \$0.00000 USD

Price: \$0.00 USD

Tax Rate:

Tax Amount: \$0.00 USD

Other Costs: \$0.00 USD

Supplier:

Location:

Supplier Part Number:

Requird Content?  Yes  No

Item Classification: Good

3. Select the correct vendor location based on proximity to your location or based on the products and services offered by the vendor at that location.

**Note:** If unsure whether a location offers the product or service you are purchasing, [Searching for Registered Vendors Web Based Training](#) provides more information on how to execute a search to locate this information.

**Choose Value for Location**

Field: Name ▼

Name ↑	Lines	City	State	Country	
SYSTEL - ASHEVILLE	123 Main St.	Anytown	NC	United States	<input type="button" value="Select"/>
SYSTEL BUSINESS EQUIPMENT CO.	123 Main St.	Anytown	NC	United States	<input type="button" value="Select"/>
SYSTEL - CHARLOTTE	123 Main St.	Anytown	NC	United States	<input type="button" value="Select"/>
SYSTEL - GREENSBORO	123 Main St.	Anytown	NC	United States	<input type="button" value="Select"/>
SYSTEL - GREENVILLE	123 Main St.	Anytown	NC	United States	<input type="button" value="Select"/>
SYSTEL - HICKORY	123 Main St.	Anytown	NC	United States	<input type="button" value="Select"/>
SYSTEL - RALEIGH	123 Main St.	Anytown	NC	United States	<input type="button" value="Select"/>
SYSTEL - WILMINGTON	123 Main St.	Anytown	NC	United States	<input type="button" value="Select"/>

**Note:** If further guidance is needed, please refer to the [EPLite Editing Line Item\(s\) Job Aid](#).

For additional assistance, please contact the NC E-Procurement Help Desk at 888-211-7440, option 1, or by email at [ephelpdesk@its.nc.gov](mailto:ephelpdesk@its.nc.gov).

## 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. For further course details and registration instructions, please refer to the [2018 course catalog](#).

DATE	COURSE TITLE	LOCATION	FACILITY & ADDRESS
6/7	Specification Writing	Raleigh	Dept. of Administration 116 W. Jones St. P&C Training Room Suite G111-E
6/12	E-Procurement	Raleigh	Wake Tech Public Safety Education Campus 321 Chapanoke Road Room 1401
6/19-21	RFP Development and Evaluation	Raleigh	Dept. of Administration 116 W. Jones St. P&C Training Room Suite G111-E
6/27	E-Procurement	Raleigh	Wake Tech Public Safety Education Campus 321 Chapanoke Road Room 1401

6/28	E-Quote	Raleigh	Wake Tech Public Safety Education Campus 321 Chapanoke Road Room 1401
7/10	E-Procurement	Raleigh	Wake Tech Public Safety Education Campus 321 Chapanoke Road Room 1401

### Follow-Up

This newsletter was sent to K-12 school system users utilizing SunPac.

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