

The Source

MAY 2017 EDITION

Acceptable

Delivery Hours

With holidays and summer break coming up, please be sure to include a comment on your purchase orders to indicate acceptable delivery hours and/or closures. This information is important to vendors and will facilitate timely delivery of your order.



This Issue

Acceptable Delivery Hours
Tips & Tricks
Archive Ariba Buyer Retiring
P&C's Training Roundup

Tips & Tricks: Delegate Approval

Taking off this summer? Be sure to delegate your approval authority so your agency can still purchase what it needs in your absence. To do this, follow the instructions below.

1. Click on the **“Preferences”** option on the Menu Bar at the top of the NC E-Procurement Dashboard and select **“Delegate authority.”**

The screenshot shows a web form titled 'Select a user to approve requests on your behalf; for example, while you are on vacation.' The form contains the following fields: 'Delegatee:' with a dropdown menu showing '(none selected)'; 'Delegation Start Date:' with a text input field and a calendar icon; 'Delegation End Date:' with a text input field and a calendar icon; 'Delegation Reason:' with a large text area; and 'Notification:' with a checkbox labeled 'Continue to notify me by email of approval requests'.

2. In the **“Delegate”** drop-down menu, select the user's name who will be responsible for approving the eRequisitions while the normal approver is out of the office. If the user's name is not in the drop-down menu, select **“Search for more...”** to search for the user.
3. Use the calendar icons to select the **“Delegation Start Date”** and **“Delegation End Date”** and set the range for the delegation.
4. Enter a comment as to why this delegation request is being entered in the **“Delegation Reason”** free-text field, if desired.
5. Users have the option to continue to be notified of approval requests throughout the delegation period. To do so, check the box next to **“Continue to notify me by email of approval requests.”**
6. Click the **“Next”** button to continue.
7. The user to whom approval authority is being delegated must approve all delegation requests. In some cases, the user's supervisor must approve the request as well.
8. Click the **“Next”** button to continue.
9. Review the changes and click the **“Submit”** button.

Note: For further information, please view the **“Delegating Approval Authority”** job aid located on the NC E-Procurement [User Training page](#) and/or access the [Web-Based Training Course](#) page to view the **“Approving”** training course.

Archive – NC E-Procurement @ Your Service is Retiring

In July, the Department of Administration will be retiring the Archive NC E-Procurement @ Your Service application. Archive NC E-Procurement is a system used to view purchase orders created prior to July 2012. By June 30, 2017, the system and all its data will no longer be available, as the data retention period will have ended.

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 [2017 course catalog](#).

DATE	COURSE TITLE	LOCATION	FACILITY & ADDRESS
5/16-5/17	RFP Development & Evaluation	Raleigh	Dept. of Administration 116 W. Jones St., P&C's Training Ctr., Room G111
5/23	Specification Writing	Raleigh	Dept. of Administration 116 W. Jones St., P&C's Training Ctr., Room G111
5/25	Customizing Solicitation Forms	Garner	Dept. of Transportation 750 N. Greenfield Parkway
6/1	Solicitation Documents & the Law	Raleigh	Dept. of Administration 116 W. Jones St., P&C's Training Ctr., Room G111
6/6-6/8	NC Procurement	Raleigh	Dept. of Administration 116 W. Jones St., P&C's Training Ctr., Room G111