



The Source NC E-Procurement Newsletter

April/May 2016 Edition

Statewide Term Contract 405E The Division of Purchase & Contract formally announced Statewide Term Contract [405E – Emergency Source Fuels](#). The term of the contract is March 1, 2016, through December 31, 2018. It is a single Vendor, mandatory Statewide Term Contract for state agencies, departments, institutions, universities and community colleges - unless exempted by North Carolina General Statute. Additionally, non-mandatory entities, including schools and local governments, that are allowed by North Carolina General Statute may use this contract. If you have any questions related to this contract, contact Chris Tart at 919-807-4540 or chris.tart@doa.nc.gov.

Statewide Term Contract 961B The Division of Purchase & Contract formally announced Statewide Term Contract [961B – Telephone Based Interpreter Services](#). The term of the contract is March 1, 2016, through March 4, 2017 with three (3) additional one (1) year renewal periods. It is a single Vendor, convenience contract for state departments, most state agencies and state higher education institutions (except under the conditions specified in G.S. §115D-58.14(a) and G.S. §116-13). The contract may also be utilized, without further competition, by non-mandatory state agencies and other eligible entities. If you have any questions related to this contract, contact Margaret Serapin at 919-807-4529 or margaret.serapin@doa.nc.gov.

Statewide Term Contract 630A The Division of Purchase & Contract formally announced Statewide Term Contract [630A – Interior/Exterior Paint](#). The term of the contract is March 1, 2016, through February 28, 2019. It is a multiple Vendor, mandatory Statewide Term Contract for state agencies, departments, institutions, universities and community colleges - unless exempted by North Carolina General Statute. Additionally, non-mandatory entities, including schools and local governments, that are allowed by North Carolina General Statute may use this contract. If you have any questions related to this contract, contact Bahaa Jizi at 919-807-4520 or bahaa.jizi@doa.nc.gov.

Statewide Term Contract 680C The Division of Purchase & Contract formally announced Statewide Term Contract [680C – Body Armor](#). The term of the contract is April 1, 2016, through July 31, 2016. It is a multiple Vendor, convenience contract. If you have any questions related to this contract, contact Grant Braley at 919-807-4519 or grant.braley@doa.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 [2016 Course Catalog](#).

DATE	COURSE TITLE	LOCATION	FACILITY & ADDRESS
5/3-5/5	NC Procurement	Raleigh	Wake Tech's Public Safety Education Campus (PSEC) 321 Chapanoke Road, Room 1401
5/10	Solicitation Documents & the Law	Raleigh	Dept. of Information Technology 3900 Wake Forrest Road
5/12	NC Contract Administration & Monitoring	Raleigh	Dept. of Public Safety 3010 Hammond Business Place
5/17-5/19	NIGP: Introduction to Public Procurement	Raleigh	Dept. of Administration 116 W. Jones St.
5/24	E-Procurement	Raleigh	Wake Tech's Public Safety Education Campus (PSEC) 321 Chapanoke Road, Room 1401
5/25	eQuote	Raleigh	Wake Tech's Public Safety Education Campus (PSEC) 321 Chapanoke Road, Room 1401

NIGP Trainings in Raleigh The Division of Purchase & Contract is committed to providing training opportunities to strengthen the knowledge and expertise of procurement professionals. In their continuous effort, P&C has partnered with the National Institute of Governmental Purchasing Inc. (NIGP) – The Institute for Public Procurement – to offer procurement training opportunities at a reduced cost. All classes will be held in Raleigh and will be offered at the NIGP membership rate – a cost savings of \$200 for 3-day classes!

In order to register for a training, please access the [NIGP registration page](#). Once you are on the registration page, type “NC” in the search field within the ‘**Search Upcoming Courses**’ box.

For registration assistance please contact NIGP at (800) 367-6447.

DATES	COURSE NAME	LENGTH	LOCATION
Tuesday, May 17, 2016 Wednesday, May 18, 2016 Thursday, May 19, 2016	Introduction to Public Procurement	3 Days	Department of Administration HRM Training Room, 2nd Floor 116 W. Jones St. Raleigh, NC 27603
Tuesday, July 26, 2016 Wednesday, July 27, 2016	Fundamentals of Leadership & Management	2 Days	Department of Administration HRM Training Room, 2nd Floor 116 W. Jones St. Raleigh, NC 27603
Tuesday, August 30, 2016 Wednesday, August 31, 2016 Thursday, September 1, 2016	Sourcing in the Public Sector	3 Days	Department of Public Safety Juvenile Justice Conference Room 3010 Hammond Business Place Raleigh, NC 27603
Tuesday, September 27, 2016 Wednesday, September 28, 2016 Thursday, September 29, 2016	Strategic Procurement Planning	3 Days	Department of Public Safety Juvenile Justice Conference Room 3010 Hammond Business Place Raleigh, NC 27603
Tuesday, October 25, 2016 Wednesday, October 26, 2016 Thursday, October 27, 2016	Legal Aspects of Public Procurement	3 Days	Department of Administration HRM Training Room, 2nd Floor 116 W. Jones St. Raleigh, NC 27603
Tuesday, November 29, 2016 Wednesday, November 30, 2016 Thursday, December 1, 2016	Developing & Managing Requests for Proposals	3 Days	Department of Public Safety Juvenile Justice Conference Room 3010 Hammond Business Place Raleigh, NC 27603

Tips & Tricks: Applying Personal Labels Each user within NC E-Procurement has access to labels. These labels can be used to organize eRequisitions, purchase orders, and other approvable. Each user has a default label of ‘**Archive Items,**’ and has the ability to create more labels to identify and sort their approvable. It is important, however, to keep in mind that while labels can be a very useful tool for organizing and locating items within NC E-Procurement, most times a system search will be more effective and efficient at pulling back information. Labels should be used sparingly, if possible, and only in situations where a system search will not do the job.

A user should apply a label to an item when it is something that they need to access quickly but may not be able to share a common search field with the other items that are in the same label. *If any common searchable characteristic, such as when a supplier or time frame is shared, system searches should be utilized.* One example would be requisitions or purchase orders that are recurring monthly for which one requisition may serve as a template. Labels are also a good way to group together approvable that are all related to the same event or project such as requisitions relating to a new building project. In this situation, the items do not have a common characteristic other than the fact that they all are related to the same event.

1. From the Summary Tab of a selected approvable, click **'Apply Label.'**
2. The **'Apply Label'** options will appear. If you have not previously created any labels, only **'Archive Items'** and **'New Label'** will appear as options.
3. To assign the item to the **'Archive Items'** label, click the **'Archive Items'** option.
4. To create a new label and assign the item to it, click **'New Label.'**

The screenshot shows the 'Summary' tab for request RQ19493175 - Fence Rebuild. A yellow callout box with the text 'On the Summary Tab, click 'Apply Label' and then 'New Label.' has two arrows pointing to the 'Apply Label' button and the 'New Label' option in the dropdown menu. The 'My Labels' section shows 'Apply Label', 'Add Label', 'Archive Items', 'New Label', and 'Remove Label' options. Below this is a table of line items with one item: 'Fence Rebuild' with a quantity of 1, unit 'each', and a price of \$615.25000 USD. The total cost is also \$615.25000 USD.

5. Once **'New Label'** is selected, an **'Add Label'** pop-up window will appear.
6. Enter the label name in the **'Enter New Label'** field.
7. Click **'OK.'**

Note: Multiple labels can be added to the same approvable by following the same process described above. Additionally, the same label can be added to ANY approvable type. For example, an eRequisition and a purchase order can have the same label.

The screenshot shows the 'Add Label' pop-up window over the same 'Fence Rebuild' request. A yellow callout box with the text 'Name your new label and click 'OK.' has an arrow pointing to the 'Enter New Label' text input field, which contains the text 'Fall Parking Lot Accident'. The 'OK' button is circled in red. The background shows the same line item table as the previous screenshot.

From the Ariba Dashboard, labels that have been assigned to approvables can be used to locate all items with the specific label assigned to them.

8. For a search for approvables to which a label has been applied, the label will appear in the **'Search'** Portlet on the Ariba Dashboard.
9. Select the approvable type that you would like to locate by its label.
10. If a label is available, it will appear once that search is selected.
11. Click on the label name to access items in the approvable type that have been assigned for the specific label.

Note: If you have assigned a label to more than one approvable type (e.g., eRequisitions and purchase orders) you will have to go to both the **'eRequisition'** and **'Purchase Order'** searches and click on the respective label name in order to view the items. If you are on the **'Purchase Order'** search and click on the desired label, any eRequisitions that have also been assigned this label will **NOT** appear.

The screenshot shows the Ariba Dashboard interface. At the top, there is a navigation bar with 'Home', 'Help', and 'Logout' options. Below this, the 'Home Dashboard' is visible, featuring 'Common Actions' (Create, Manage) and 'Recently Viewed' items. The central 'Search' portlet is active, showing a list of search types: 'eRequisition', 'Purchase Order', 'Receipt', 'User Profile', and 'More...'. A yellow callout box with black text points to the 'eRequisition' type, stating: 'Labels will only appear if the specific Type of search is selected. Clicking on the label here will show all eRequisitions with the label.' Below the search types, there are sections for 'My Saved Searches' (listing '101 Gardens (Furniture)') and 'My Labels' (listing 'Fall Parking Lot Accident...'). A dashed circle highlights the 'My Labels' section. To the right, there is a 'News' portlet titled 'Read Past Issues of The Source' with a link to 'http://eprocurement.nc.gov/Buyer/The_Source.html'.

Looking for more NC E-Procurement tips and tricks? All tips covered in this and previous issues of [The Source](#) may be found on the [System Tips](#) page of the NC E-Procurement web site!

Follow-Up

This newsletter was sent to all school system users.

Questions about information covered in this Newsletter? Send an e-mail to: ephelpdesk@its.nc.gov