



The Source NC E-Procurement Newsletter

December 2015 Edition

Selecting the Correct Supplier for Hewlett Packard Purchases Hewlett Packard is a contract vendor on the following Statewide IT Contracts: **204A** (Microcomputers and Peripherals), **204C** (UNIX Workstation/Server and Peripherals), **204D** (Printers and Peripherals), **204J** (Mass Storage Components), **204L** (Cisco Layer 2 Lan Switches), and **204S** (Servers and Peripherals). Specific information about those contracts can be found [here](#).

Hewlett Packard recently split into two companies – Hewlett Packard Enterprise and HP, Inc. This change is reflected in the NC E-Procurement system as two separate vendor accounts - **Hewlett Packard Ent 204J,S,C,L** handling hardware, software, and services, and **HP Inc. (HP) 204A,D** handling PCs and printing. It is important to select the correct account based upon the contract from which an item is being purchased. The best way to ensure that a purchase is being made from the correct supplier is to add items directly to your cart off of the contract items already loaded into the E-Procurement Catalogs, when possible.

If a purchase must be created as a non-catalog item, pay close attention to the contracts listed within the name of the selected supplier to make sure they match with the items intended for purchase.

- For items within contracts 204A and 204D, select supplier **HP Inc. (HP) 204A,D**
- For items within contracts 204C, 204J, 204L, and 204S, select supplier **Hewlett Packard Ent 204J,S,C,L**

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 to be offered next month. For further course details and registration instructions, please refer to the [2016 Course Catalog](#).

DATE	COURSE TITLE	LOCATION	FACILITY & ADDRESS
1/5-1/7	NC Procurement	Charlotte	Central Piedmont CC 1112 Charlottetowne Ave
1/21	NC Contract Administration & Monitoring	Raleigh	Dept. of Administration 116 W. Jones Street
1/27	E-Procurement	Raleigh	Wake Technical CC 321 Chapanoke Road
1/28	eQuote	Raleigh	Wake Technical CC 321 Chapanoke Road

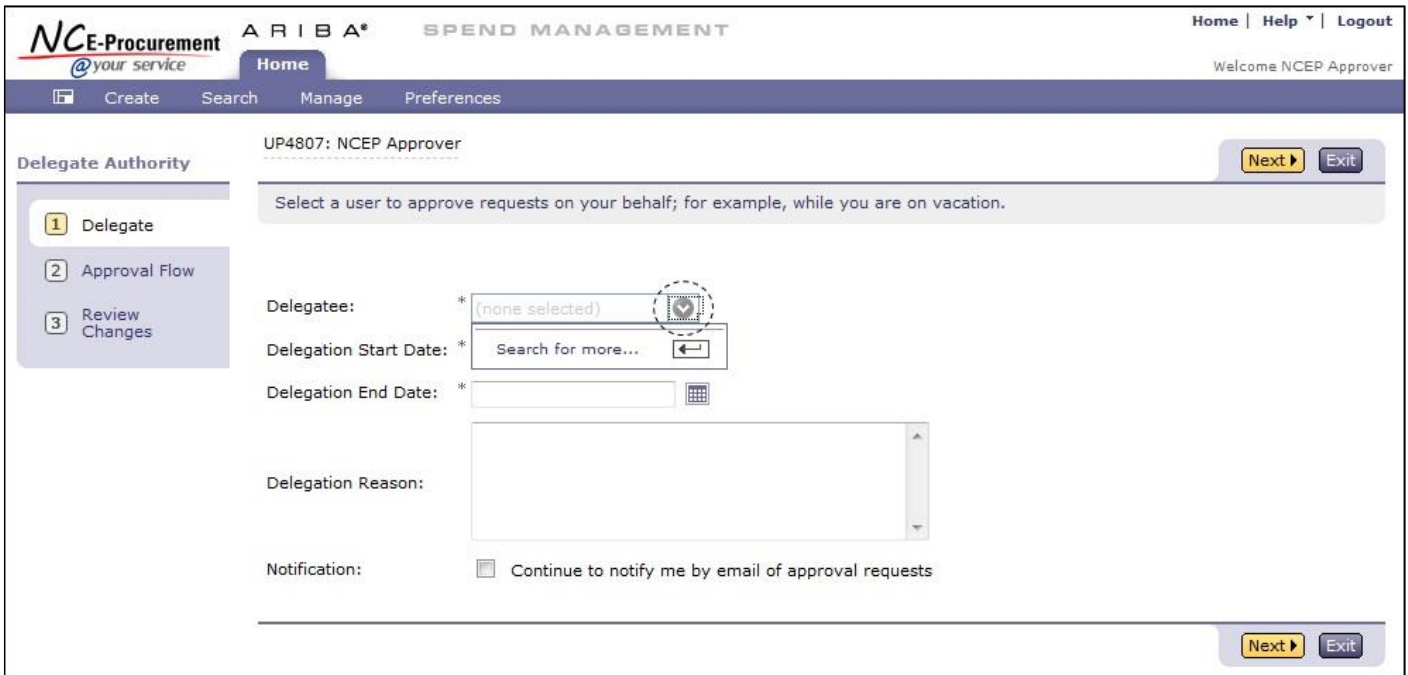
Tips & Tricks: Delegating Approval Authority When an approver of eRequisitions will be out of the office for an extended period of time – due to holidays, vacation, medical leave, etc. – use the following steps to delegate approval authority to another user so the agency can continue to make purchases in the approver's absence.

Note: Delegating approval authority will also delegate receiving authority.

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



2. In the **'Delegatee'** 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.



- Use the calendar icons to select the **'Delegation Start Date'** and **'Delegation End Date'** and set the date range for the delegation.

Note: When delegating approval authority, the delegation end date should be the day the user plans to return to the office. The automated process to end delegations occurs daily after midnight. For example, if an approver is going to be out of the office from January 1st to January 4th, returning to the office on January 5th, the delegation dates should be entered as January 1st to January 4th. The delegate will stop receiving eRequisitions to approve beginning at 12:00am on January 5th; however, the original approver continues to receive the approval requests even during the delegation period.

- Enter a comment as to why this delegation request is being entered in the **'Delegation Reason'** free-text field, if desired.
- 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.'**
- Click the **'Next'** button to continue.

The screenshot shows the 'Delegate Authority' form in the ARIBA SPEND MANAGEMENT system. The form is titled 'UP4808: NCEP Approver'. It includes a sidebar with three steps: 1. Delegate, 2. Approval Flow, and 3. Review Changes. The main form area contains the following fields and annotations:

- Delegatee:** A dropdown menu with 'New Delegatee' selected. Annotation: 'Use the drop-down menu to select the name of the person to whom approval authority will be delegated.'
- Delegation Start Date:** A date field showing 'Mon, 23 Dec, 2013' with a calendar icon. Annotation: 'Use the calendar icons to pick the dates in which approval authority will be delegated.'
- Delegation End Date:** A date field showing 'Fri, 3 Jan, 2014' with a calendar icon. Annotation: 'Use the calendar icons to pick the dates in which approval authority will be delegated.'
- Delegation Reason:** A text area containing 'Taking a vacation.' Annotation: 'Check this box to continue to receive email notifications for approval requests during the delegation period.'
- Notification:** A checkbox labeled 'Continue to notify me by email of approval requests' which is checked. Annotation: 'Check this box to continue to receive email notifications for approval requests during the delegation period.'

The form also features 'Next' and 'Exit' buttons at the top right and bottom right, both of which are circled in red in the image.

- 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.
- Click the 'Next' button to continue.

The screenshot shows the 'Delegate Authority' interface for request UP4808. The 'Approval Flow - User Profile' section displays a flow: UP4808 (with a person icon) → NCEP Supervisor → New Delegatee → Approved. A legend indicates that a box with a person icon represents 'Pending'. A yellow callout box with arrows pointing to the 'NCEP Supervisor' and 'New Delegatee' boxes contains the text: "The delegatee and the supervisor, if required, will need to approve the delegation request." The 'Next' button is highlighted with a dashed circle.

- Review the changes and click the 'Submit' button.

Note: Delegation approval flows are automatically created to include the user's supervisor, if required, and the user to whom approval authority is being granted. Approvals are required before the delegation is effective and the request is not activated until it is fully approved. Additionally, the Delegated Approver can only approve items received during the delegation time period.

The screenshot shows the 'Review Changes' section of the 'Delegate Authority' interface. It features a table with the following data:

Change	From	To
Delegatee	(no value)	New Delegatee
Delegation Start Date		Mon, 23 Dec, 2013
Delegation End Date		Fri, 3 Jan, 2014
Delegation Reason		Taking a vacation.

Below the table, there are two notification checkboxes:

 Continue to notify me by email of approval requests

 Continue to notify me by email of approval requests

The 'Submit' button is highlighted with a dashed circle.

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

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