# *The Source* NC E-Procurement Newsletter

*March 2016 Edition*

**New Releases**   The NC E-Procurement team made updates to the NC E-Procurement system on March 3, 2016.  **The below updates from the recent release may be of interest to you:**

- Changes have been implemented to add **'0%'** to the **'Tax Rate'** field in NC E-Procurement.  The tax rate will still default to that of the county within which the purchasing entity is based, but if a purchase is not subject to county taxes (for example, a line item for shipping), the user can now adjust that rate to **'0%'**.  The tax rate option of **'Other'** will still remain available.

   Before using the 0% tax rate in NC E-Procurement, it is important to follow the Colleague configuration steps below to prevent import errors. If you do not have access to these screens, please work with your System Administrator and Purchasing Leadership.

   **On the TXCM – Tax Code screen in Colleague:**
   1. Enter a new Sales Tax value (i.e., 00) in the **'Tax Code'** field
   2. When the **'Record not found – Reenter or Add'** box appears, click **'Add'**
   3. Enter the new Sales Tax **'Record ID'** (i.e., 00)
   4. Complete the **'Description'**, **'Rebates/Refunds Involved'**, **'Use Tax Involved'**, **'Allow AP/Pur Entry'**, and **'Tax Code Category'** fields
   5. Enter the **'Effective Date'** and a **'Tax Pct'** value of 0.0000
   6. Click **'Save'** or **'Save All'** to complete the record update

   **On the FLTT – File Translation Tables screen in Colleague:**
   1. Enter a new file translation on the ELF Table **'XEP.TAX.CODES.RATES'**
   2. Click on line item **'1'** and click **'Insert'** to add an **'Orig Code'** value of 0%
   3. In the **'New Code'** column, enter the code from the Tax Code screen (i.e., 00)
   4. Click **'Save'** or **'Save All'** to complete the record update

- Based on feedback, changes have been implemented in NC E-Procurement to prevent users from selecting commodity codes ending in **'-00'**.   Commodity Codes ending in **'-00'** are high-level categories that do not accurately describe the purchase.  With this change, an error will appear when a user selects a commodity code ending in **'-00'** and a more descriptive code ending with two, non-zero digits should be selected.

   For more information on selecting the more descriptive commodity codes, please see the system tip for 'Expanding Commodity Codes' found in the **'Buyer'** section of the NC E-Procurement home page.

**Training Spotlight**   College of the Albemarle transitioned to a paper-free purchasing process on March 1.  In preparation they held multiple requester and approver training sessions for users to gain more exposure to the NC E-Procurement system and its benefits.  Thank you to all who participated!

**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 later this month and in April.   For further course details and registration instructions, please refer to the 2016 Course Catalog.

| DATE | COURSE TITLE | LOCATION | FACILITY & ADDRESS |
|---|---|---|---|
| 3/8-3/10 | NC Procurement | Raleigh | Office of State Controller 3514 Bush St. |
| 3/11 | E-Procurement | Goldsboro | Wayne Community College 3000 Wayne Memorial Dr. |
| 3/17 | NC Contract Administration & Monitoring | Garner | Dept. of Transportation 750 N. Greenfield Pkwy. |
| 3/22 | E-Procurement | Raleigh | Wake Technical CC 321 Chapanoke Rd. |
| 3/23 | eQuote | Raleigh | Wake Technical CC 321 Chapanoke Rd. |
| 4/5-4/6 | RFP Development & Evaluation | Charlotte | Central Piedmont CC 1112 Charlottetowne Ave. |
| 4/7 | NC Contract Administration & Monitoring | Charlotte | Central Piedmont CC 1112 Charlottetowne Ave. |
| 4/12 | Specification Writing | Raleigh | Dept. of Administration 116 W. Jones St. |
| 4/20 | Determining Cost | Raleigh | Dept. of Administration 116 W. Jones St. |
| 4/27 | E-Procurement | Raleigh | Wake Technical CC 321 Chapanoke Rd. |
| 4/28 | eQuote | Raleigh | Wake Technical CC 321 Chapanoke Rd. |

**Tips & Tricks:  Edit Email Notification Preferences**   Notifications are email messages that NC E-Procurement automatically sends to keep users informed of the progress and status of active approvables.  Notification messages describe the purpose of the notification, and most include a link to the relevant request or document in NC E-Procurement so that users can quickly take action or access information.  Users may edit the frequency and content of their email notifications.

1.  Click **'Preferences'** on the Menu Bar and select **'Change email notification preferences.'**
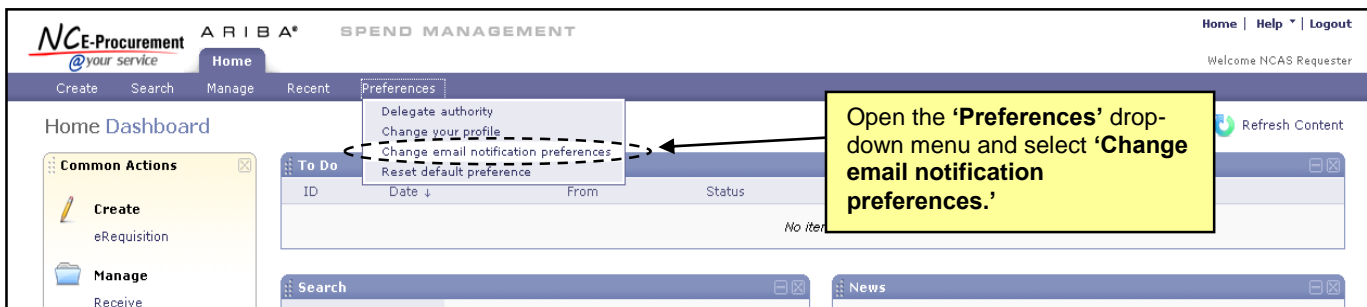
2.  Select the appropriate document type to edit using the **'Edit preferences for…'** drop-down menu.

    **Note:** Email notification preferences must be set independently for each document type.  The six options in the drop-down menu are **'Other document types,' 'UserMaintenance,' 'eRequisition,' 'AddressMaintenance,' 'Receipt,' and 'User Profile.'**

3.  The **'Edit Email Notification Preferences'** page will automatically appear when a document type is selected.  In this example, **'eRequisition'** has been chosen from the drop-down menu (See screenshot below).

    **Note:** Similar screen choices appear for all document types.



4.  The **'Notification method'** section allows the user to select whether to receive separate email notifications for each approvable (i.e., **'Send email immediately'**) or to receive all email notifications for the day as one daily email summary (i.e., **'Send email summary'**).

5.  The **'Notification frequency'** section allows the user to select if and how often they receive email notifications.  Users can choose to never receive email notifications, receive one notification, or to receive notifications repeatedly on a daily basis.

6.  Click **'Save'** to update preferences or **'Cancel'** to return to the NC E-Procurement Dashboard without changing the preferences.

**Note:** For a more detailed tutorial on this and other related processes, please visit the **'User Training'** portion of the NC E-Procurement website (http://eprocurement.nc.gov/).

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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 website!

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## Follow-Up

This newsletter was sent to all community college users.

*Questions about information covered in this Newsletter?* Send an email to: ephelpdesk@its.nc.gov