



The Source NC E-Procurement Newsletter

October/November 2013 Edition

New Releases The NC E-Procurement team made updates to NC E-Procurement on October 30, 2013. **Here are some updates from the recent release that might be of interest to you:**

- All comments added to eRequisitions before final approval are being sent to the backend financial system
- Change orders will successfully import into NC E-Procurement even if the entity's EPLite Administrator has changed since the previous version was imported
- Purchase orders will successfully import into NC E-Procurement even if active supplier locations have been updated since the eRequisition was created
- Change orders for catalog distributor items with an inactive supplier can be submitted as long as the change order is not being transmitted to the supplier
- If the user is the preparer of an outstanding requisition but not the requester, the user should be able to be deleted successfully

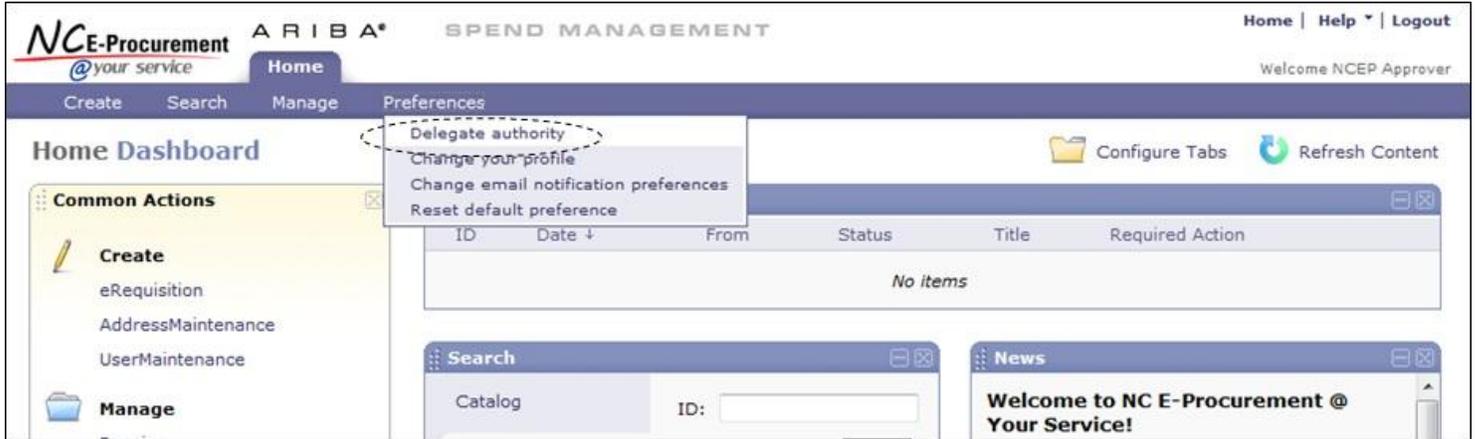
Note: For a full description of the items that must be resolved before a user may be deleted, please see **page 9** of the '**User Maintenance**' job aid located on the NC E-Procurement [User Training](#) page.

- Notification emails regarding eRequisition approvals, purchase order confirmations, and purchase order failure to import messages will be sent from the email address ncnotification@its.nc.gov. Purchase orders will be sent to vendors from the email address epservice@its.nc.gov.

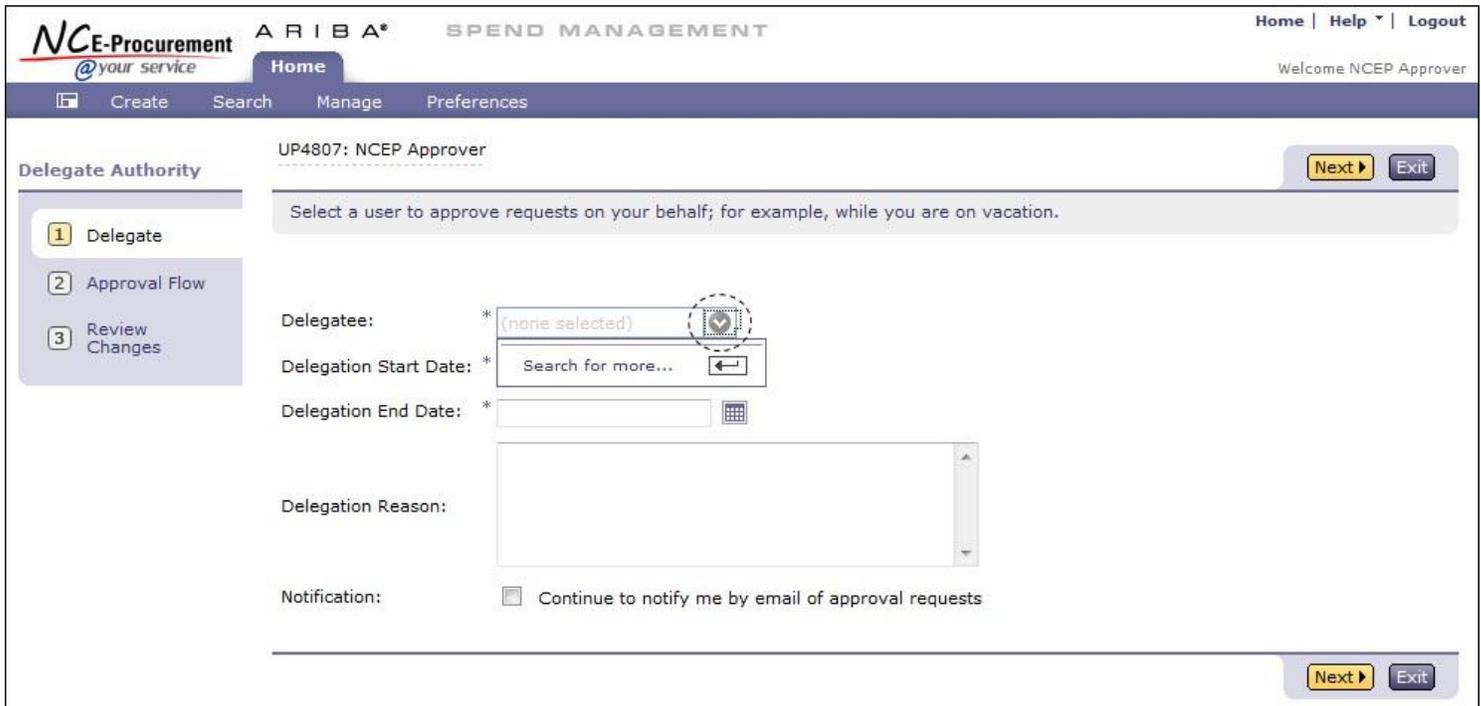
Note: For a full list of NC E-Procurement email addresses and how they are used, please view the '**Understanding NC E-Procurement E-Mail Addresses**' [System Tip](#). Users should also make sure to add these email addresses to local address books and safe lists so emails arrive directly to your inbox.

Tips and 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.

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.



3. 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.

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.

The screenshot shows the 'Delegate Authority' form in the NCE-Procurement ARIBA SPEND MANAGEMENT system. The form is titled 'UP4808: NCEP Approver' and includes a 'Next' button circled in red. The form contains the following fields and annotations:

- Delegatee:** A drop-down 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 with 'Mon, 23 Dec, 2013' and 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 with 'Fri, 3 Jan, 2014' and 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.'
- 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 includes a 'Next' button circled in red at the bottom right.

- 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.

- 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.

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.

Notification Continue to notify me by email of approval requests Continue to notify me by email of approval requests

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](#).

Follow-Up

This newsletter was sent to all Community College and School System users.

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