THE SOURCE

TOP STORIES

P&C Procurement Rule Changes   **Tips and Tricks: Changing Default Accounting & Shipping Information**   **Training Roundup**

P&C PROCUREMENT RULE CHANGES

The NC Department of Administration's Division of Purchase & Contract (P&C) is pleased to announce changes to the state procurement rules, effective Tuesday, March 1, 2022. Approved by the Rules Review Commission, the new procedures will include updates to purchasing thresholds, parameters for state contract terms, contract renewal and extension requirements among others. Once implemented the new rules will:
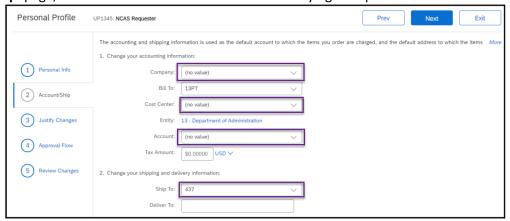
- Help streamline processes and improve agency purchasing authority and flexibility
- Simplify processes and allow agencies to conduct business more efficiently, saving time and money
- Promote greater oversight and strategic planning opportunities for P&C
- Increase participation of Historically Underutilized Businesses

See the NCDOA Purchase & Contract website for an overview of changes to the state procurement rules. Be sure to attend one or more of the upcoming webinars to address any concerns and answer questions that you may have about the rule changes.

For more information on the updated process for solicitations through the Sourcing tool, please see this short video.

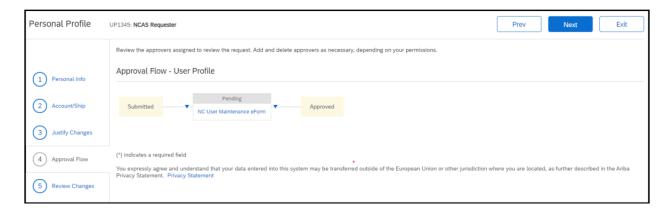## TIPS AND TRICKS: CHANGING DEFAULT ACCOUNT & SHIPPING INFORMATION

Accounting and shipping information can be set so that it populates automatically when creating a requisition. A common misconception is that if this information needs to be changed, it can be done by creating a User Maintenance eForm. However, default purchase requisition values for accounting, shipping and delivery information can be set on the **'Account/Ship'** page. To get to the **'Account/Ship'** page, click the 'I**nitials'** icon in either Guided Buying or Expert View and select **'Change your profile.'**

Personal Profile	UP1345: NCAS Requester		Prev	Next	Exit

The accounting and shipping information is used as the default account to which the items you order are charged, and the default address to which the items *More*

1. Change your accounting information:

- ① Personal Info
- ② Account/Ship
- ③ Justify Changes
- ④ Approval Flow
- ⑤ Review Changes

Company: (no value)
Bill To: 13PT
Cost Center: (no value)
Entity: 13 - Department of Administration
Account: (no value)
Tax Amount: $0.00000 USD

2. Change your shipping and delivery information:

Ship To: 437
Deliver To:

After the correct information has been entered into the highlighted fields, click the **'Next'** button. This will take you to the **'Justify Changes'** tab, where any necessary comments or attachments can be added.

Clicking the **'Next'** button again will open the **'Approval Flow'** tab, where the system generated approval flow will be displayed and approvers and watchers can be added manually, if necessary.

Clicking the **'Next'** button again, will open the **'Review Changes'** tab, where the user profile change can be reviewed, and submitted. Personal profile changes are applied in the system once all required approvals on the request have been completed.

For more detailed information about adjusting user profile information, please reference the Getting Started job aid.

STATEWIDE TERM CONTRACT ANNOUNCEMENT
Statewide Term Contract 2711B Maintenance, Repair and Operation Supplies and Equipment
NCDOA Purchase & Contract has established a new Statewide Term Contract 2711B Maintenance, Repair and Operations Supplies and Equipment. This 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 the North Carolina Statute may use this contract. The contract term is February 1, 2022 through January 31, 2027. If you have any questions related to this contract, contact Bahaa Jizi at 984-236-0218 or bahaa.jizi@doa.nc.gov.

TRAINING ROUNDUP
The Division of Purchase & Contract (P&C) and NC eProcurement offer various training courses related to procurement throughout the year. For details about registering for a course, see How to Register.

Check the NC eProcurement Course List periodically for additional training classes from the NC eProcurement team.

We look forward to (virtually) seeing you!

DATE	COURSE TITLE
3/2	NC eProcurement NCAS Basic Requester Training
3/3	NC eProcurement NCAS Advanced Buyer Training
3/9	NC eProcurement Collaborative Requisitioning Training
3/15-16	Introduction to Procurement
3/29	Specification Writing

4/4	Demystifying Terms and Conditions
4/19-20	Request for Proposal
4/26	NC eProcurement NCAS Basic Requester Training