

THE SOURCE

STATE DEPARTMENT STATE BRANCH
LOCAL GOVERNMENT CITY COUNTY
COMMUNITY COLLEGE PUBLIC SCHOOL
NORTH CAROLINA ePROCUREMENT PURCHASE
ONLINE SHOPPING STATEWIDE TERM CONTRACT
ELECTRONIC VENDOR PORTAL HUB CERTIFIED
QUOTE PUNCHOUT CATALOG
PURCHASE ORDER
SOURCING
BUY

NC eProcurement Monthly Newsletter

November 2021 Edition

TOP STORIES



Delegating Your Authority:
Approvals and Receipts



Holiday Help Desk
Hours



Contracts Tips and Tricks:
Extending an Expired Contract



Training Roundup

DELEGATING YOUR AUTHORITY: APPROVALS AND RECEIPTS

Taking time off for the holidays? Be sure to use the delegate authority function so that your agency can still purchase what it needs in your absence. A delegation of authority is a temporary change typically set up to handle any approvals when the original approver/receiver is out of the office. The delegation of authority allows another user*, the “delegate,” to approve, deny, and receive items on behalf of the original requester, and can be set up at any time from any device with internet access.

More information on how to delegate authority, including detailed steps for setting up a delegation, can be found in the [“Getting Started”](#) job aid. For additional assistance, please contact the NC eProcurement Help Desk.

***Note:** A delegate must have the same or greater delegation dollar amount as the individual who is delegating authority.

Delegate Authority

 UP8868:

- 1 Delegate
- 2 Approval Flow
- 3 Review Changes

Delegatee: *

Delegation Start Date: *

Delegation End Date: *

Delegation Reason:

Notification: Continue to notify me by email of approval requests

HOLIDAY HELP DESK HOURS

The NC eProcurement Help Desk will be closed due to the observance of state holidays on November 25 and 26, as well as December 23, 24, 27, and 31, 2021. The Help Desk will otherwise retain normal operating hours, Monday through Friday, from 7:30 a.m. to 5:00 p.m. EST. The Help Desk is available by phone at 888-211-7440, option 1, or by email at ephelpdesk@its.nc.gov.

CONTRACTS TIPS AND TRICKS: EXTENDING AN EXPIRED CONTRACT

If you have extended a contract with a vendor outside of the system and have forgotten to extend the contract in the **Contracts tool**, it is still possible to extend the contract without having to create a new workspace.

Extending an expired contract is the same process as adding an amendment to the Contract Workspace. To start, you need to click the **'Actions'** dropdown for 'Contract Attributes' on the Overview tab. Next you would select the **'Amend'** option, and you will be taken to the **'Amend Contract'** page.

The screenshot shows the 'Overview' page for Contract ID CW20253. The 'Contract Status' is 'Expired'. The 'Actions' dropdown menu is open, showing the 'Amend' option highlighted. The page includes sections for 'Quick Links', 'Announcements', and 'Contract Attributes'.

Contract ID: CW20253
Contract Status: Expired
Last Published Date: 11/02/2021
Version: v1
Owner: classroomtraining27
Test Project: No
Commodity: 811125 - Computer softwar...
Base Language: English
Entity: ADMN Department of Admini...
Access Control: (No restrictions - Accessible to all users)
Description: Test Contract Workspace

Quick Links
A Quick Link is a path to an important document in this project. To add a Quick Link to this area, navigate to the document you want to link to and choose **Add to Quick Links** from its menu.

Announcements
Welcome to the project!
11/2/2021
classroomtraining27

Contract Attributes
Related ID:
Last Published: Test Contract Workspace (you are currently viewing this)
Hierarchical Type: Stand-alone Agreement
Contract Amount:
Supplier: (no value)
Agreement Date: 10/28/2020
Process Status: Authoring
Contract Type: Term Contract Agency Specific

Actions
Edit Attributes
View Attributes
Publish
Amend
Put On Hold
Close
Create Sub Agreement

On the **'Amend Contract'** page, you need to select the **'Renewal'** amendment type, enter an amendment reason comment, and select the **'OK'** button.

The screenshot shows the 'Amend Contract Test Contract Workspace' page. The 'Amendment Type' is set to 'Renewal' and the 'Amendment Reason Comment' is 'Renewing an expired contract.' The page includes 'OK' and 'Cancel' buttons.

Amend Contract Test Contract Workspace
OK Cancel

The **Amendment Type** indicates the reason for amending this contract. There are five types of amendments: **Renewal**, **Amendment**, **Administrative**, **Price** *More*

Amendment Type: Renewal
Amendment Reason Comment: * Renewing an expired contract.

After selecting 'OK,' you will be taken back to the 'Overview' tab. From here, you can select the 'Actions' dropdown for the 'Contract Term Attributes,' and select 'Edit Term Attributes.'

Contract Term Attributes

Term Type: Fixed ⓘ

Effective Date: 10/29/2020 ⓘ

Original Expiration Date: 10/28/2021 ⓘ

Expiration Date: 10/28/2021 ⓘ

Expiration Email Recipients: (no value) ⓘ

Email Notification: First sent 30 days before contract expiration date.
Reminder sent every 7 days.

Notice Period(in days): 0 ⓘ

Actions ▾

- Edit Term Attributes
- View Term Attributes

From the 'Edit Contract Attributes' page, you can edit the 'Expiration Date,' to the newly set date. After all necessary changes have been made to the Contract Workspace, the last step is to go back to the 'Contract Attributes' dropdown and select the 'Publish' button and your Contract Workspace will be reactivated.

Overview Actions ▾ Process All Tasks

Contract ID: CW20226

Contract Status: Draft Amendment

Last Published Date: 11/01/2021 ⓘ

Version: v2 (editing)

Owner: classroomtraining27 ⓘ

Test Project: No ⓘ

Commodity: 811125 - Computer softwar... View more

Base Language: English

Entity: ADMN Department of Admini... View more

Access Control: (No restrictions - Accessible to all users) ⓘ

Description: Test Contract Workspace ⓘ

Process

- Phase 1 - Contract Creation ▾
- Phase 2 - Contract Execution ▾
- Phase 3 - Contract Management ▾
 - Deliverable 1 for Vendor to Complete ▾
 - Deliverable 2 for Vendor to Complete ▾
 - Deliverable 3 for Vendor to Complete ▾
 - Deliverable 4 for Vendor to Complete ▾
- Phase 4 - Contract Modification ▾

Quick Links All Documents

A Quick Link is a path to an important document in this project. To add a Quick Link to this area, navigate to the document you want to link to and choose **Add to Quick Links** from its menu.

Contract Attributes Actions ▾

- Edit Attributes
- View Attributes
- Publish**
- Amend

Related ID: S

Last Published: Test Contract Workspace (v2/2) ⓘ

Hierarchical Type: Stand-alone Agreement

Amendment Type: Renewal ⓘ

New Details

10/29/2021
classroomtraining27

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 and stay tuned for our 2022 training dates to be posted.

We look forward to (virtually) seeing you!

This newsletter was sent to **NCAS users**. Questions about information covered in this newsletter? Send an email to ephelppdesk@its.nc.gov.