

# THE SOURCE



## NC eProcurement Monthly Newsletter

February 2022 Edition

### TOP STORIES



P&C Procurement Rule Changes



ANNOUNCEMENT: NC eProcurement Entity Client iHub Upgrade



Upcoming Conferences



Tips and Tricks: Changing Default Shipping Information

### 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.

### ANNOUNCEMENT: NC ePROCUREMENT ENTITY CLIENT UPGRADE

As part of the NC Department of Administration's transition to cloud computing, NC eProcurement is moving the iHub application to a cloud platform. The iHub application is a component of NCEP that manages the transfer of procurement, vendor, and invoice data between NCEP and each community college or school system's Entity Client. We appreciate the help and support given during this transition.

### UPCOMING CONFERENCES

Thank you to everyone who stopped by to talk with us at the recent North Carolina Association of School Business Officials (NCASBO) conference in Greensboro, NC, on February 9.

The North Carolina Association of Community College Business Officials ([NC ACCBO](#)) will hold its Spring 2022 Conference March 7-9 at the Pinehurst Resort in Pinehurst, NC. NC eProcurement representatives will have a booth on March 8 to answer questions.

If you would like to attend a one-on-one meeting at the conference with an NC eProcurement representative, please email us at [eptraining@doa.nc.gov](mailto:eptraining@doa.nc.gov) to set up a time. We look forward to seeing you there!

## TIPS AND TRICKS: CHANGING DEFAULT SHIPPING INFORMATION

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 shipping information can be set on the **'Account/Ship'** page. To get to the **'Account/Ship'** page, click the **'Initials'** icon in either Guided Buying or Expert View and select **'Change your profile.'**

The screenshot shows the 'Personal Profile' page for user 'UP2256: EPLite Supervisor 01'. The 'Account/Ship' tab is selected. The page contains two sections for editing information:

- 1. Change your accounting information:**
  - Bill To: (no value) [dropdown]
  - Entity: BRUCC - Brunswick Community College
  - Account Code: [text input]
- 2. Change your shipping and delivery information:**
  - Ship To: (no value) [dropdown, highlighted with a red box]
  - Deliver To: [text input]

Navigation buttons 'Prev', 'Next', and 'Exit' are at the top right. A sidebar on the left shows tabs: 1 Personal Info, 2 Account/Ship (active), 3 Justify Changes, 4 Approval Flow, 5 Review Changes.

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

The screenshot shows the 'Personal Profile' page for user 'UP2256: EPLite Supervisor 01'. The 'Justify Changes' tab is selected. The page contains:

- Text: Enter comments explaining why you are changing your personal profile.
- Section: Comments - Entire User Profile, with a large text area for 'Comments:'.
- Section: Attachments - Entire User Profile, with an 'Add Attachment' button.

Navigation buttons 'Prev', 'Next', and 'Exit' are at the top right. The sidebar on the left shows tabs: 1 Personal Info, 2 Account/Ship, 3 Justify Changes (active), 4 Approval Flow, 5 Review Changes.

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.

The screenshot shows the 'Personal Profile' page for user 'UP2256: EPLite Supervisor 01'. The 'Approval Flow' tab is selected. The page contains:

- Text: Review the approvers assigned to review the request. Add and delete approvers as necessary, depending on your permissions.
- Section: Approval Flow - User Profile, showing a flow diagram: Submitted → Pending (NC User Maintenance eForm) → Approved.
- Text: (\*) indicates a required field.
- Text: You expressly agree and understand that your data entered into this system may be transferred outside of the European Union or other jurisdiction where you are located, as further described in the Arbia Privacy Statement. [Privacy Statement](#)

Navigation buttons 'Prev', 'Next', and 'Exit' are at the top right. The sidebar on the left shows tabs: 1 Personal Info, 2 Account/Ship, 3 Justify Changes, 4 Approval Flow (active), 5 Review Changes.

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 refer to 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](mailto: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
3/8	NC eProcurement EPLite Basic Requester Training
3/8	NC eProcurement EPLite Approver Plus 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
4/27	NC eProcurement EPLite Basic Requester Training

*This newsletter was sent to **EPLite users**. Questions about information covered in this newsletter? Send an email to [ephelpdesk@its.nc.gov](mailto:ephelpdesk@its.nc.gov).*