

NC eProcurement

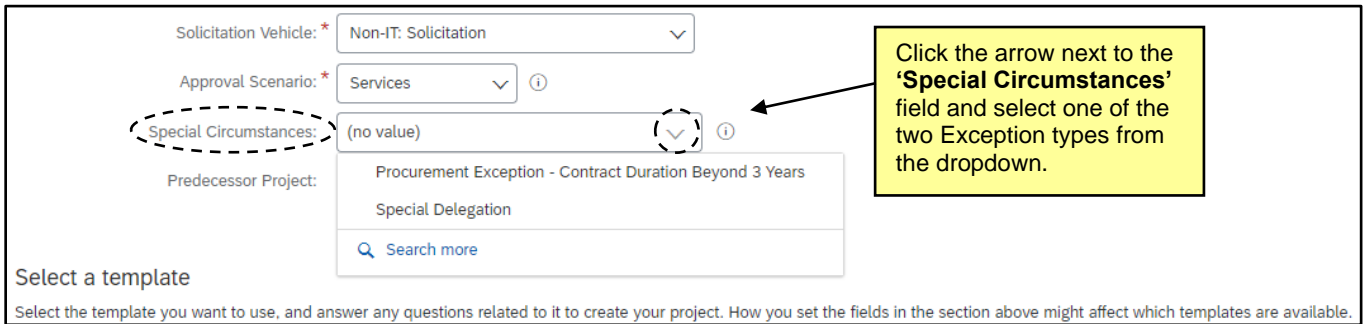
Procurement Exceptions

If circumstances arise where a user needs to petition P&C for a Procurement Exception, that request and approval process is built into the Sourcing Project workflow. Users will indicate their intent to request an Exception in the **'Special Circumstances'** field on the **'Create Sourcing Project'** page, which triggers additional tasks and documents to be added to the Sourcing Project. The user will submit their specific Exception request to P&C for approval via the custom **'Exception Form'** before completing the Sourcing Project and initiating the Sourcing Event.

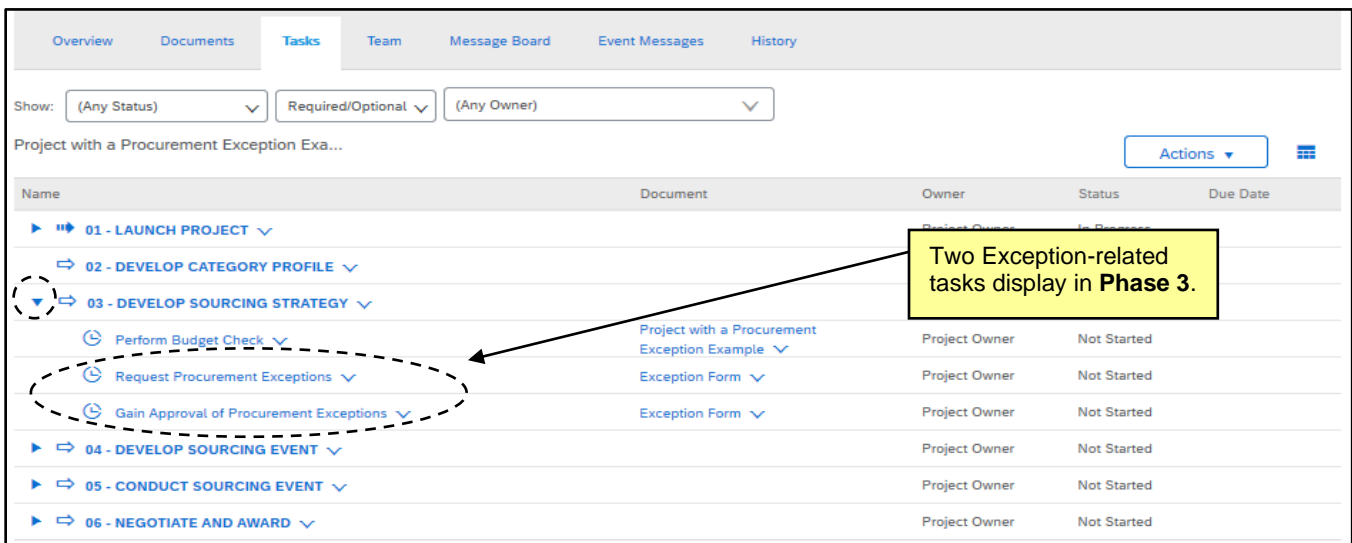
I. Requesting a Procurement Exception

1. While completing the **'Create Sourcing Project'** page after initiating a Sourcing Project, the user should click the dropdown arrow in the **'Special Circumstances'** field and select one of the two Exception types: **'Procurement Exception – Contract Duration Beyond 3 Years'** or **'Special Delegation.'**

Note: **'Special Delegation'** does not require P&C approval. If no options display in the dropdown menu immediately, click **'Search more.'**



2. After clicking **'Create'** on the **'Create Sourcing Project'** page, navigate to the **'Tasks'** tab on the Sourcing Project and note the two Exception-related tasks in **Phase 3:** **'Request Procurement Exceptions'** and **'Gain Approval of Procurement Exceptions.'**

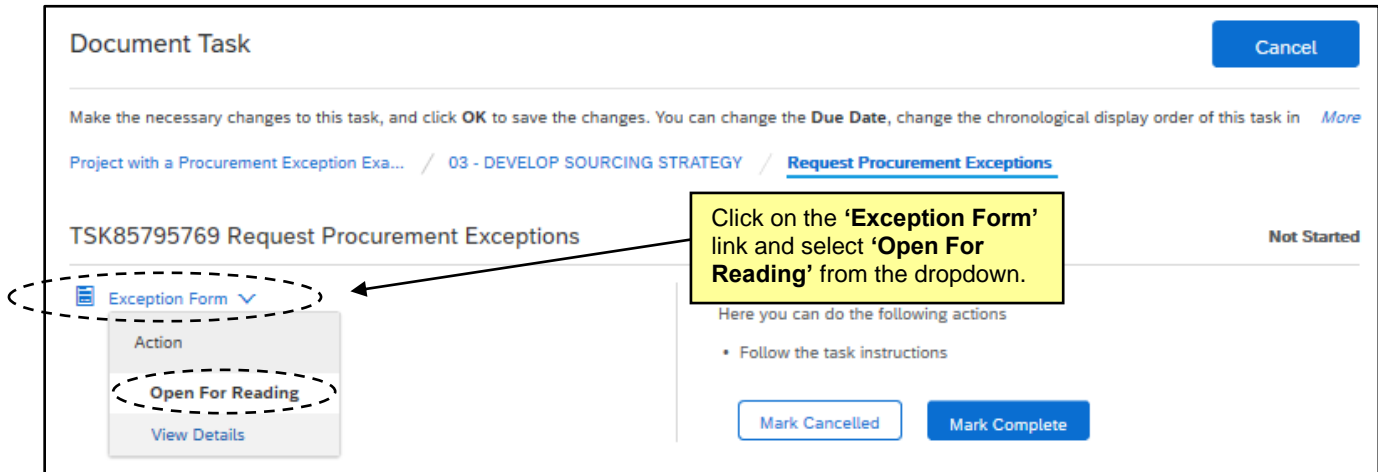


Name	Document	Owner	Status	Due Date
01 - LAUNCH PROJECT		Project Owner	In Progress	
02 - DEVELOP CATEGORY PROFILE		Project Owner	Not Started	
03 - DEVELOP SOURCING STRATEGY		Project Owner	Not Started	
Perform Budget Check	Project with a Procurement Exception Example	Project Owner	Not Started	
Request Procurement Exceptions	Exception Form	Project Owner	Not Started	
Gain Approval of Procurement Exceptions	Exception Form	Project Owner	Not Started	
04 - DEVELOP SOURCING EVENT		Project Owner	Not Started	
05 - CONDUCT SOURCING EVENT		Project Owner	Not Started	
06 - NEGOTIATE AND AWARD		Project Owner	Not Started	

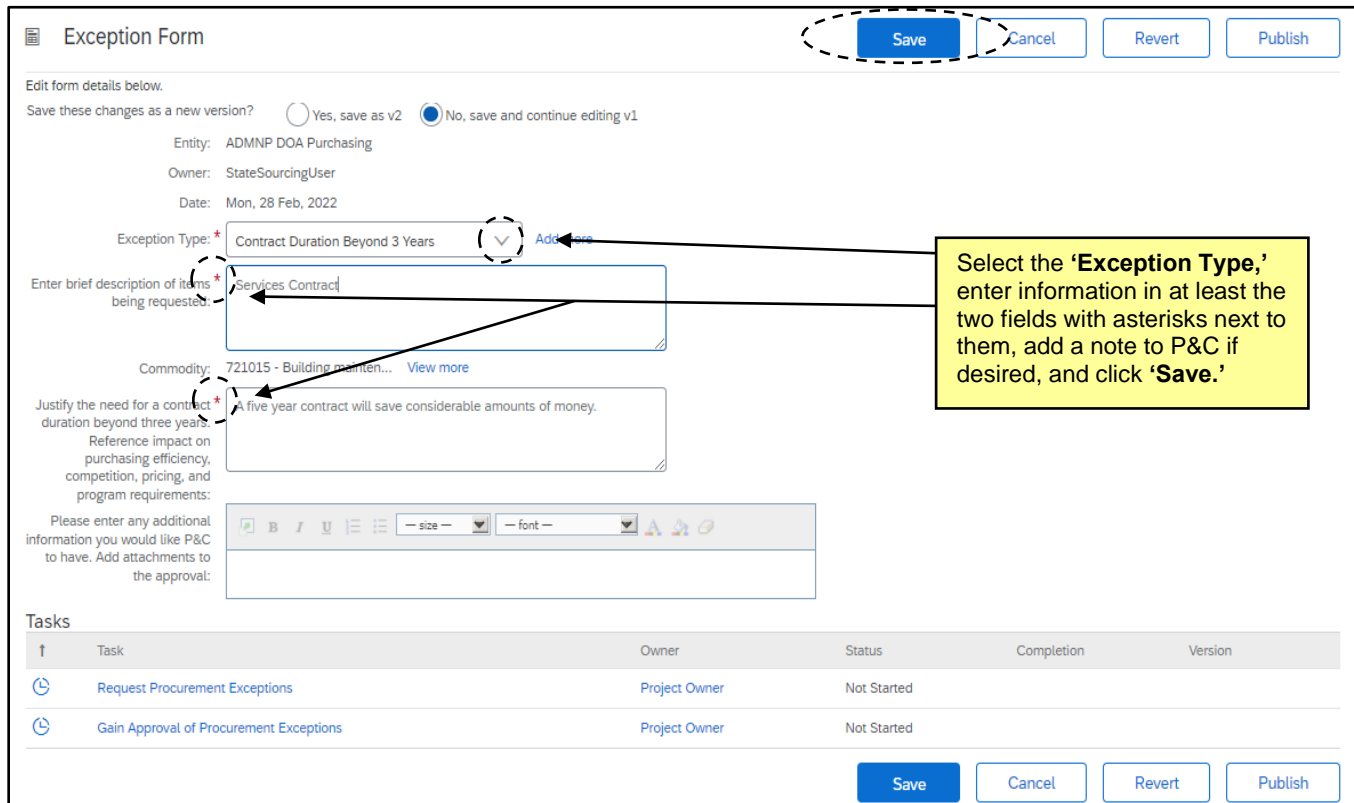
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3. Click on the **'Request Procurement Exceptions'** task and select **'View Task Details'** in the dropdown.
4. The **'Document Task'** page will display, and there will be a link to the **'Exception Form'** in the top left. Click the link and select **'Open For Reading'** from the dropdown. Alternately, the user will find a link to the **'Exception Form'** at the top of their **'Documents'** tab if they do not access it through the task.



5. The **'Exception Form'** page will display, and the user will have to specify the **'Exception Type'** and **'Enter brief description of items being requested,'** and fill out a field to **'Justify the need for a contract duration beyond three years.'** When all fields have been populated on the **'Exception Form,'** click **'Save.'**



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- The user will be returned to the **'Documents'** tab. Navigate to the **'Tasks'** tab and click on the **'Gain Approval of Procurement Exceptions'** task and select **'View Task Details.'**
- On the subsequent **'Approval Task'** page, click the dropdown in the **'Select Approvers'** section and choose the P&C Service Team to which this request should be directed.
- The default **'Approval Rule Flow Type'** is **'Parallel,'** but that can be changed if either **'Serial'** or **'Custom'** is preferred. If there is only one approver being added, this selection does not matter.
- Specify a fixed due date to trigger a notification to complete this **'Approval Task'** that will display in the approver's **'To Do'** portlet in addition to the email notification they will receive.
- Include an informative message further explaining the need for the Exception and include any additional attachments if necessary and click **'Submit.'**

- When P&C approves the **'Exception Form,'** the user will be notified by email and the task in the **'To Do'** queue will change to **'Approved'** status. On the **'Tasks'** tab, the **'Gain Approval of Procurement Exceptions'** task will be marked **'Approved'** with a check mark to its left. At this point, the user may move on to **Phase 4** and continue with the Sourcing Project in a normal fashion.

Task Name	Status	Due Date
03 - DEVELOP SOURCING STRATEGY		
Perform Budget Check		
Request Procurement Exceptions		
Gain Approval of Procurement Exceptions	Approved	09/23/2020
04 - DEVELOP SOURCING EVENT	Not Started	
05 - CONDUCT SOURCING EVENT	Not Started	
06 - NEGOTIATE AND AWARD	Not Started	