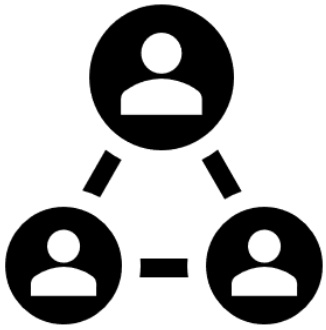
THE SOURCE

NC eProcurement Monthly Newsletter
October 2022 Edition

This month we review collaborative requisitions, share tips and tricks about contracts and delegating authority, provide information on a new statewide term contract and our upcoming training schedule, and bring attention to our holiday help desk hours.



COLLABORATIVE REQUISITIONS

In March 2022, changes were made to the state of North Carolina's procurement rules (including agency purchase thresholds), allowing more opportunity for informal purchases. The NC eProcurement system uses Collaborative Requisitioning as the quoting tool for these informal purchases where buyers collaborate with multiple vendors to achieve the best pricing for goods and services.

Buyers can:

- Reach out to multiple vendors simultaneously to request informal quotes and information.
- Review tabulated vendor responses.
- Clarify item details, substitutions, and negotiate prices with the vendors.

Vendors can:

- Respond and propose pricing for requested items.
- Add an additional line item (e.g., functional substitution when allowed or shipping when required).
- Communicate with the buyer within the tool for questions and clarifications.

To create a Collaborative Requisition, buyers must be in the **'NC Collaborative Requisition'** group. To choose the best vendor quote after responses, the buyers must be in the **'NC Collaboration Team'** group. Please contact your Security Administrator if you need to be added to these groups.

To learn more about Collaborative Requisitions, visit the Collaborative Requisitions training page.

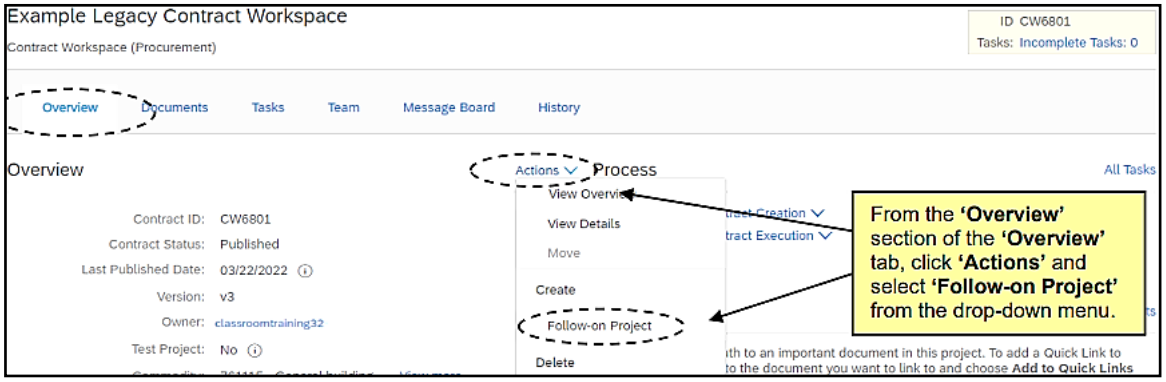
For more information about the Admin Code changes, please see the NCDOA Purchase & Contract website.

CONTRACTS TIP: MODIFYING LEGACY CONTRACTS WORKSPACES

Any contract workspace (CW) created prior to March 24, 2022, is considered a Legacy Contract Workspace (LCW). Before a LCW can be modified or an **'Amendment'** initiated, it must be converted into a newer version by creating a **'Follow-on Project'** and processing the **'Amendment'** in the new CW to take advantage of automated P&C workflows.

To create a Follow-on Project from an existing Legacy Contract Workspace:

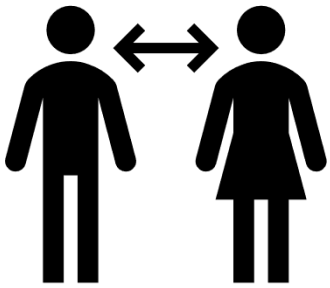
1. Navigate to the **'Overview'** tab of a **'Published'** LCW, click the **'Actions'** drop-down button and select **'Follow-on Project'** from the drop-down menu.



2. Click **'Contract Workspace (Procurement)**' on the subsequent **'Create Project'** page. Most fields will be prefilled from the LCW, but users must manually fill out the **'Name,' 'Related ID,' 'Test Project,'** and **'Notice Period (in days)'** fields, then click **'Create.'**

3. The new CW can then be completed and published, while the LCW can be marked **'Closed'** to avoid confusion. Users can then proceed to modify the new CW for whichever **'Amendment'** is applicable to the CW.

For thorough step-by-step instructions on creating a Follow-on Contract Workspace and/or modifying a new Contract Workspace, see the [Modifying a Legacy Contract Workspace]() job aid.

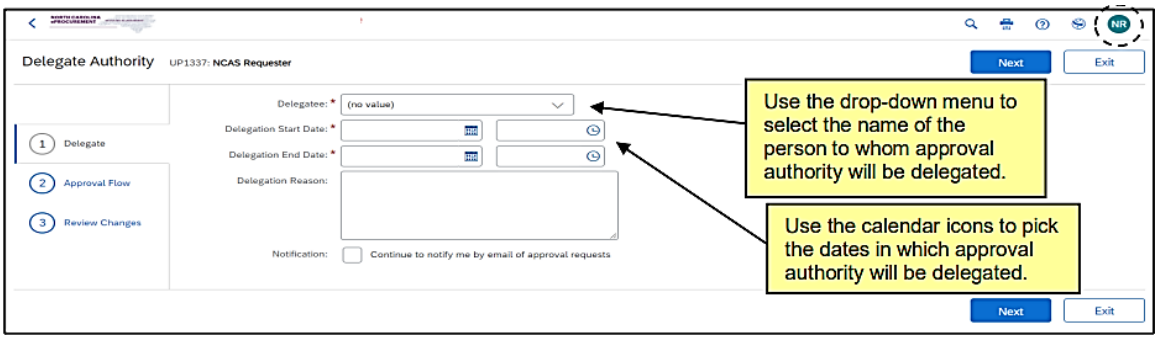


TIPS & TRICKS: DELEGATING YOUR AUTHORITY

As the holiday period approaches, please use the delegate authority function if you plan on taking time off to allow your agency to purchase what it needs in your absence. A delegation of approval authority is a temporary change set up to handle any approvals when the original approver or receiver is out of the office. The delegation of approval authority allows another user, the "delegatee," to approve, deny, or receive items on behalf of the original approver.

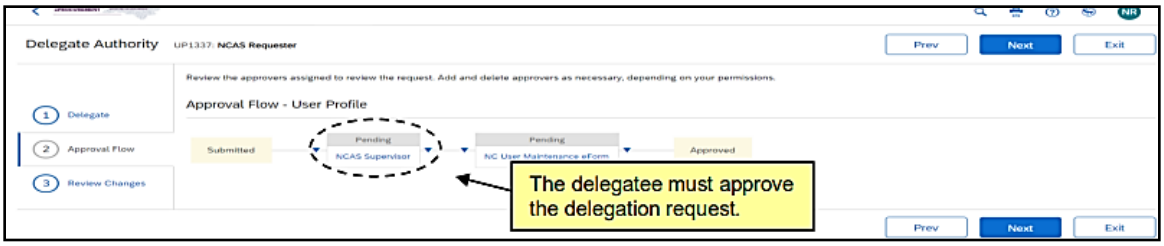
To delegate your approval authority to another user:

1. Click the **'Initials'** icon in either Guided Buying or Expert View and select **'Delegate authority.'** Fill out the appropriate fields where applicable.



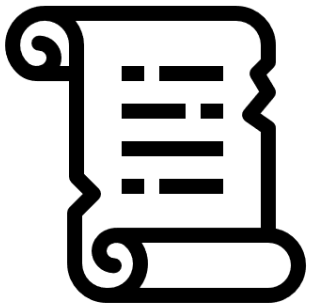
Note: Users have the option to continue to be notified of approval requests throughout the delegation period. To do so, in the **'Notification'** field, check the box next to **'Continue to notify me by email of approval requests.'**

2. In the approval flow section, other approvers can be added, but the "delegatee" must approve the delegation request. Click **'Next,'** review changes and click **'Submit.'**



To find out more about delegating authority, including detailed steps for setting up a delegation, see the Getting Started job aid.

STATEWIDE TERM CONTRACT ANNOUNCEMENT



Statewide Term Contract 2714A Walk-In Building Supplies

The North Carolina Department of Administration (NC DOA) Division of Purchase & Contract (P&C) has established a new Statewide Term Contract 2714A Walk-In Building Supplies. This is a single-vendor convenience contract for all state agencies, departments, institutions, universities, community colleges, and non-mandatory entities, including schools and local governments. The contract term is September 1, 2022, through July 3, 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.

The online classes below are generally available via the NC Learning Center without registration:

- Introduction to Procurement (ITP)
- Request for Proposals (RFP) Development and Evaluation
- Specification Writing (SW)

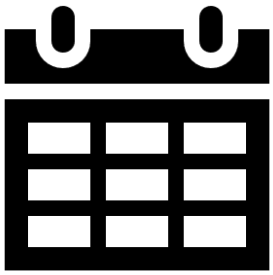
To register for the following upcoming NC eProcurement classes, see How to Register.

DATE	COURSE TITLE
11/02	NC eProcurement Collaborative Requisitioning
11/09	NC eProcurement NCAS Basic Requester Training
11/10	NC eProcurement Advanced Buyer NCAS Training
11/29	NC eProcurement NCAS Basic Requester Training
12/01	NC eProcurement Sourcing Training
	NC eProcurement Contracts Training
01/04/23	NC eProcurement Collaborative Requisitioning
01/05/23	NC eProcurement Sourcing Training
	NC eProcurement Contracts Training
01/10/23	NC eProcurement NCAS Basic Requester Training
	NC eProcurement Advanced Buyer NCAS Training

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

We look forward to (virtually) seeing you!

HELP DESK HOLIDAY HOURS



The NC eProcurement Help Desk will be closed due to the observance of state holidays on the following dates:
November 24th and 25th
December 23rd, 26th, and 27th
January 2nd, 2023

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.

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