



## The Source NC E-Procurement Newsletter

October/November 2013 Edition

**New Releases** The NC E-Procurement team made updates to NC E-Procurement on October 30, 2013. **Here are some updates from the recent release that might be of interest to you:**

- Change orders for catalog distributor items with an inactive supplier can be submitted as long as the change order is not being transmitted to the supplier
- If the user is the preparer of an outstanding requisition but not the requester, the user should be able to be deleted successfully

**Note:** For a full description of the items that must be resolved before a user may be deleted, please see **page 9** of the **'User Maintenance'** job aid located on the NC E-Procurement [User Training](#) page.

- Notification emails regarding eRequisition approvals and purchase order confirmations will be sent from the email address [ncnotification@its.nc.gov](mailto:ncnotification@its.nc.gov). Purchase orders will be sent to vendors from the email address [epservice@its.nc.gov](mailto:epservice@its.nc.gov).

**Note:** For a full list of NC E-Procurement email addresses and how they are used, please view the **'Understanding NC E-Procurement Email Addresses'** [System Tip](#). Users should also make sure to add these email addresses to local address books and safe lists so emails arrive directly to your inbox.

**Tips and Tricks: Delegating Approval Authority** When an approver of eRequisitions will be out of the office for an extended period of time – due to holidays, vacation, medical leave, etc. – use the following steps to delegate approval authority to another user so the agency can continue to make purchases in the approver's absence.

1. Click on the **'Preferences'** option on the Menu Bar at the top of the NC E-Procurement Dashboard and select **'Delegate authority'**

The screenshot shows the NC E-Procurement dashboard interface. At the top, there is a navigation bar with the logo, 'ARIBA\*', 'SPEND MANAGEMENT', and user options 'Home | Help | Logout'. Below this is a secondary menu with 'Home', 'Create', 'Search', 'Manage', and 'Preferences'. The 'Preferences' menu is open, showing options: 'Delegate authority', 'Change your profile', 'Change email notification preferences', and 'Reset default preference'. The 'Delegate authority' option is circled in red. The main dashboard area includes a 'Home Dashboard' with 'Common Actions' (Create: eRequisition, AddressMaintenance, UserMaintenance; Manage) and a 'Search' section with a 'Catalog' search box. A 'News' section at the bottom right says 'Welcome to NC E-Procurement @ Your Service!'. A table with columns 'ID', 'Date', 'From', 'Status', 'Title', and 'Required Action' is visible, showing 'No items'.

- In the **'Delegatee'** drop-down menu, select the user's name who will be responsible for approving the eRequisitions while the normal approver is out of the office. If the user's name is not in the drop-down menu, select **'Search for more...'** to search for the user.

**NCE-Procurement** @your service **ARIBA** SPEND MANAGEMENT Home | Help | Logout  
Welcome NCEP Approver

Create Search Manage Preferences

### Delegate Authority

UP4807: NCEP Approver Next Exit

Select a user to approve requests on your behalf; for example, while you are on vacation.

**1 Delegate**  
**2 Approval Flow**  
**3 Review Changes**

**Delegatee:** \* (none selected) 

**Delegation Start Date:** \* Search for more... 

**Delegation End Date:** \* 

**Delegation Reason:**

**Notification:**  Continue to notify me by email of approval requests

Next Exit

- Use the calendar icons to select the **'Delegation Start Date'** and **'Delegation End Date'** and set the date range for the delegation.

**Note:** When delegating approval authority, the delegation end date should be the day the user plans to return to the office. The automated process to end delegations occurs daily after midnight. For example, if an approver is going to be out of the office from January 1st to January 4th, returning to the office on January 5th, the delegation dates should be entered as January 1st to January 4th. The delegate will stop receiving eRequisitions to approve beginning at 12:00am on January 5th; however, the original approver continues to receive the approval requests even during the delegation period.

- Enter a comment as to why this delegation request is being entered in the **'Delegation Reason'** free-text field, if desired.
- Users have the option to continue to be notified of approval requests throughout the delegation period. To do so, check the box next to **'Continue to notify me by email of approval requests.'**
- Click the **'Next'** button to continue.

**NCE-Procurement** @ your service **ARIBA\*** **SPEND MANAGEMENT** Home | Help | Logout

Welcome NCEP Approver

Create Search Manage Preferences

### Delegate Authority

UP4808: NCEP Approver Next Exit

Select a user to approve requests on your behalf; for example, while you are on vacation.

Delegatee: \*  Use the drop-down menu to select the name of the person to whom approval authority will be delegated

Delegation Start Date: \*  Use the calendar icons to pick the dates in which approval authority will be delegated

Delegation End Date: \*

Delegation Reason:

Notification:  Continue to notify me by email of approval requests Check this box to continue to receive email notifications for approval requests during the delegation period

Next Exit

- The user to whom approval authority is being delegated must approve all delegation requests. In some cases, the user's supervisor must approve the request as well.
- Click the 'Next' button to continue.

UP4808: NCEP Approver

Review the approvers assigned to review the request. Add and delete approvers as necessary, depending on your permissions.

**APPROVAL FLOW - USER PROFILE**

Legend:  Pending

UP4808 —  NCEP Supervisor —  New Delegatee —  Approved

Add Approver

The delegatee and the supervisor, if required, will need to approve the delegation request

- Review the changes and click the 'Submit' button.

**Note:** Delegation approval flows are automatically created to include the user's supervisor, if required, and the user to whom approval authority is being granted. Approvals are required before the delegation is effective and the request is not activated until it is fully approved. Additionally, the Delegated Approver can only approve items received during the delegation time period.

UP4808: NCEP Approver

Review your request and then submit it for approval.

Change	From	To
Delegatee	(no value)	New Delegatee
Delegation Start Date		Mon, 23 Dec, 2013
Delegation End Date		Fri, 3 Jan, 2014
Delegation Reason		Taking a vacation.

Notification  Continue to notify me by email of approval requests  Continue to notify me by email of approval requests

**Note:** For further information on Delegating Approval Authority, please view the 'Delegating Approval Authority' job aid located on the NC E-Procurement [User Training](#) page and/or the 'Approving' [Web-Based Training Course](#).

## Follow-Up

This newsletter was sent to NC E-Procurement users from non-integrated entities.

*Questions about information covered in this Newsletter?* Send an e-mail to: [ephelpdesk@its.nc.gov](mailto:ephelpdesk@its.nc.gov)