

NCDPS—Purchasing & Logistics

Focus on Our Mission

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In This Issue

- **New Neighbors**

- **Did You Know**

New Neighbors

- *P-Card Training will soon be available through Learning Management System (LMS). At that time you will be able to access this training through the BEACON program. In the meantime we are doing a pilot project whereby the training is done by Presentation and documents via the email.*
- *P-Cardholders must submit the name and number of Reconciler for their account. If training is required or questions regarding reconcilers contact NCAS Helpdesk (919)716-3395. This information will also be required on the P-Card Enrollment*
- *Forms for E-Procurement and P-Cards are now located on Purchasing and Logistics website at (other forms are not acceptable):
<https://www.ncdps.gov/Index2.cfm?a=000003,000008,002452,002561>*
- *A new form is now available: E-Procurement Maintenance Form. When staff is leaving e-p folders should be cleaned up: (a) composing deleted; (b) POs closed that are complete; (c) another user chosen as "On Behalf Of" so that current POs may be accessed and processed.*
- *E-Procurement users changing locations or leaving the department must be managed in order to have a seamless operation. Just as we must register new users, so we must give notice when there is a change in position or department*

E-Procurement "Did You Know"

Payment Basis Changes:

900 Series Commodity Codes:

Requisitions entered with a 900 series commodity code automatically defaults payment basis of signature. Using the dropdown box, change this default to PO. Payment basis is located on the line item edit screen in the Accounting by Line Item section

Backing out Receipts:

1. Quantity Increase—

When requesting a quantity increase to your line and the line is fully received, user will need to back out enough quantity to reduce the quantity lower than the ordered amount. Change the CLOSE ORDER button to "no." Once the increase has been completed by Purchasing, the user must again receive the "1" backed out

2. Price Change—

When requesting a price change for a line item, all quantity affected by the price change must be backed out the way it was originally received by the user. Once the price change is completed by Purchasing, user must again receive the affected quantity back into the system with an "A" at the end of the packing slip. This will allow a new calculation by NCAS of the price change

- **Essential Reminders**

Delegations:

Approvers with advance notice of absence from the office may, before going on leave, create a delegation to a backup approver. Failure to set up the delegation—

- 1. holds requisitions in your queue until you return or*
- 2. stops Helpdesk from overrides to set up users to a different approver at your location so that order may be processed*

ESSENTIAL REMINDERS

- *CHANGE ORDERS-- can only be issued by Purchasing Staff. Email all needed changes to the purchasing agent who issued the purchase order.*
- *OPEN PO REPORTS-- are updated twice a week. New reports are available every Tuesday and Thursday. Contact NCAS Support Services for assistance in printing.*
- *CLOSING POs--purchasing agents can only close purchase orders to invoicing. Requestors must close purchase orders to receiving. Purchase order lines without activity must be canceled by purchasing agents.*
- *FREIGHT—when requesting a quote, it is important to always ask that the cost of freight be included in the quote. If freight is documented on the quote, a separate line is entered for freight which should be "PO" based for payment.*
- *SMALL PURCHASES--under \$200 should be placed on P-Card or Direct Processing Form CNTR005.*
- *It is mandatory for each P-Card to have a reconciler. Reconcilers should contact NCAS Helpdesk (919) 716-3395 for training or assistance.*