

# **PURCHASING UPDATES AND YEAR-END ACTIVITIES**

**May 24, 2023**



# AGENDA

- Requisition Approval Workflow
- How to Make PO's Move More Quickly
- Quantity of 1 / Amount Only
- What is a Blanket PO?
- Purchases Under \$5k
- Consolidated Services
- Strategic Sourcing
- Closing FY22-23 PO's
- Fiscal Year Cutover
- Purchase Order Roll to FY23-24



# REQUISITION APPROVAL WORKFLOW

Favorites ▾ Main Menu ▾ > eProcurement ▾ > Manage Requisitions

▼ Search Requisitions

To locate requisitions, edit the criteria below and click the Search button.

Business Unit	<input type="text"/>	Requisition Name	<input type="text"/>
Requisition ID	1000072858	Request State	<input type="text"/>
Date From	02/22/2023	Date To	05/23/2023
Requester	<input type="text"/>	Entered By	<input type="text"/>
		Budget Status	<input type="text"/>
		PO ID	<input type="text"/>

[Show Advanced Search](#)

## Requisitions ?

To view the lifespan and line items for a requisition, click the Expand triangle icon.  
To edit or perform another action on a requisition, make a selection from the Action dropdown list and click Go.

Req ID	Requisition Name	BU	Date	Request State	Budget	Total	
▼ 1000072858	7645 - Internet2	USC01	05/18/2023	Pending	Valid	51,445.00 USD	[Select Action] ▼

Requester: Marjorie King, Entered By: Marjorie King, Priority: Medium

Pre-Encumbrance Balance: 51445.00 USD

Request Lifespan: Requisition → **Approvals** → Inventory → Purchase Orders → Change Request → Receiving → Returns → Invoice → Payment

Line Information

Line	Description	Status	Price	Currency	Quantity	UOM	Supplier	
1	NETWORK PARTICIPATION FEE 7-...	Pending Approval	51445.0000	USD	1.0000	EA	INTERNET 2	✘

Where is my requisition?

Don't forget to use the Manage Requisitions page to view the status of the requisition.

On this page you can view the lifespan of the requisition which includes the approval workflow.



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# REQUISITION APPROVAL WORKFLOW

By clicking the **Approval** icon, a new screen will open providing the Approval Status of the requisition and its workflow.

The example to the right has been approved by Level 1, Level 2, IT approver, then routed to Purchasing, and one of the Purchasing Sourcing Clerks has assigned it to a Buyer.

The buyer will review the procurement method as well as the requisition prior to approving the requisition.

At this point if there are any questions, the buyer will contact the requester or department contact.

## Review/Edit Approvers

### Department & Project Approval

Line 1: **Awaiting Further Approvals** [Start New Path](#)  
NETWORK PARTICIPATION FEE 7-1-2022 to 6-30-2023

Level 1 Approval

**Approved**

✓ **Roberto Santiago**  
Department Level 1 Approver  
05/18/23 - 3:28 PM

### Department Level 2 Approval

Line 1: **Awaiting Further Approvals** [Start New Path](#)  
NETWORK PARTICIPATION FEE 7-1-2022 to 6-30-2023

Level 2 Approval

**Approved**

✓ **Tina J. Dennis**  
Department Level 2 Approver  
05/18/23 - 4:45 PM

### Category Approval

Line 1: **Awaiting Further Approvals** [View/Hide Comments](#) [Start New Path](#)  
NETWORK PARTICIPATION FEE 7-1-2022 to 6-30-2023

IT Category Approval > \$50K

**Approved**

✓ **JOYCE S. SHEALY**  
Technical Review Brd. Approver  
05/23/23 - 10:53 AM

▶ **Comments**

### Final Purchasing Approval

7645 - Internet2: **Pending** [Start New Path](#)

Purchase Order Sourcing

**Approved** → **Pending**

✓ **Edna Sims** → **Lana Widener**  
PO Sourcing Clerk → Inserted Approver  
05/23/23 - 11:44 AM



# HOW TO MAKE PO'S MOVE MORE QUICKLY

Purchase Requisitions are for pre-planned purchases. The role for Purchasing is to make the determination of the procurement method. If you have an invoice to process, you will need to contact the Controller's office or Accounts Payable, do not submit a requisition for payment.

Before submitting a requisition for approval, the requisition should be reviewed at a minimum for:

- Description

**Note:** Requisitions with only a part # does not provide enough information.  
The description must be **descriptive**.

- Unit Price
- Quantity
- Attachments

**Examples:** quote, sole source justification memo, specifications of a bid, conference site selection, emails to vendors if using 3-quote method (any type of justification).

- Supplier on each line
- Due Date (when is the expected date of delivery or services or the end date of a blanket order or project)
- State contract number or USC contract number



# QUANTITY OF 1 AND AMOUNT ONLY

## Requisitioners

- When creating a requisition, PeopleSoft requires you to enter a unit price.
- On the checkout page (or Edit Requisition page), each line has an Amt Only checkbox.

## When do you check the Amount Only box?

- Amount Only allows multiple payments against the line.
- Quantity is 1
- Services
- Blanket Orders
- Grant Projects, Construction Projects, etc.

**Exception:** When using the “TO BE BID” supplier on the requisition, please do not check the Amt Only box. This is due to a condition created by the requisition line when it is copied into a solicitation event. An alert email will be sent to requisitioners when this scenario exists as a reminder to uncheck the Amt Only checkbox.

### Requisition Lines

Line	Description	Item ID	Supplier	Quantity	UOM	Price	Total	Amt Only	Details	Comments	Delete
▶ <input type="checkbox"/> 1	 ELECTRICAL SERVICE FOR CABLE D		CASHION ELECTRICIANS INC	<input type="text" value="1.0000"/>	Each	<input type="text" value="6,440.00000"/>	6440.00	<input checked="" type="checkbox"/>	  Edit		
▶ <input type="checkbox"/> 2	 ELECTRICAL SERVICES FOR CABLE		CASHION ELECTRICIANS INC	<input type="text" value="1.0000"/>	Each	<input type="text" value="3,100.00000"/>	3100.00	<input checked="" type="checkbox"/>	  Edit		



# BLANKET PURCHASE ORDERS FOR FY23-24

- Blanket Purchase Orders are a simplified method of filling repetitive needs for small quantities of **miscellaneous** supplies, services or information technology and are designed to reduce administrative costs associated with small purchases by eliminating the need for issuing individual payment requests or purchase orders.
- Blanket Purchase Orders are valid for up to one year and are closed each fiscal year.
  - ❖ A one-year service agreement is not a blanket order.
  - ❖ An annual software license is not a blanket order.
- FY23-24 Blanket Orders are allowed on or after **June 6<sup>th</sup>**.
  - ❖ These Requisitions must have (1) line descriptions indicating they are (2) **FY23-24** blanket orders, as well as the (3) authorized users of the PO.
- FY22-23 Blanket Orders will close the last week of July allowing for June invoices to process.



# PURCHASES UNDER \$5K

It is strongly encouraged to utilize the university purchasing card for transactions with a total value up to \$4,999.99 that meet the purchasing card policy (applicable fees, sales/use tax, shipping, etc.).

This includes:

- Operational or Educational Supplies
- Select contractual services, such as repairs
- Memberships / Fees / Dues
- Information technology (computers, toner cartridges, e-Devices, and cellular services).

*NOTE: Dell punchout should be reserved for purchases exceeding a single transaction limit of \$4,999.99.*





# CONSOLIDATED SERVICES

- When it is time to turn in equipment, furniture, etc.
- Use [Inventory Form 7](#) (available in the [Purchasing Toolbox](#))
- Call for an appointment: (803)777-2156 or (803) 777-9001
- Closed for Inventory: **June 28<sup>th</sup>-30<sup>th</sup>**
- New location: 1413 Bluff Road, Columbia, SC 29201



# STRATEGIC SOURCING

USC went live with a new online bidding module in PeopleSoft on March 15, 2021, which allows suppliers the opportunity to submit online electronic bids in lieu of mailing their hardcopy offers to the Purchasing Office.

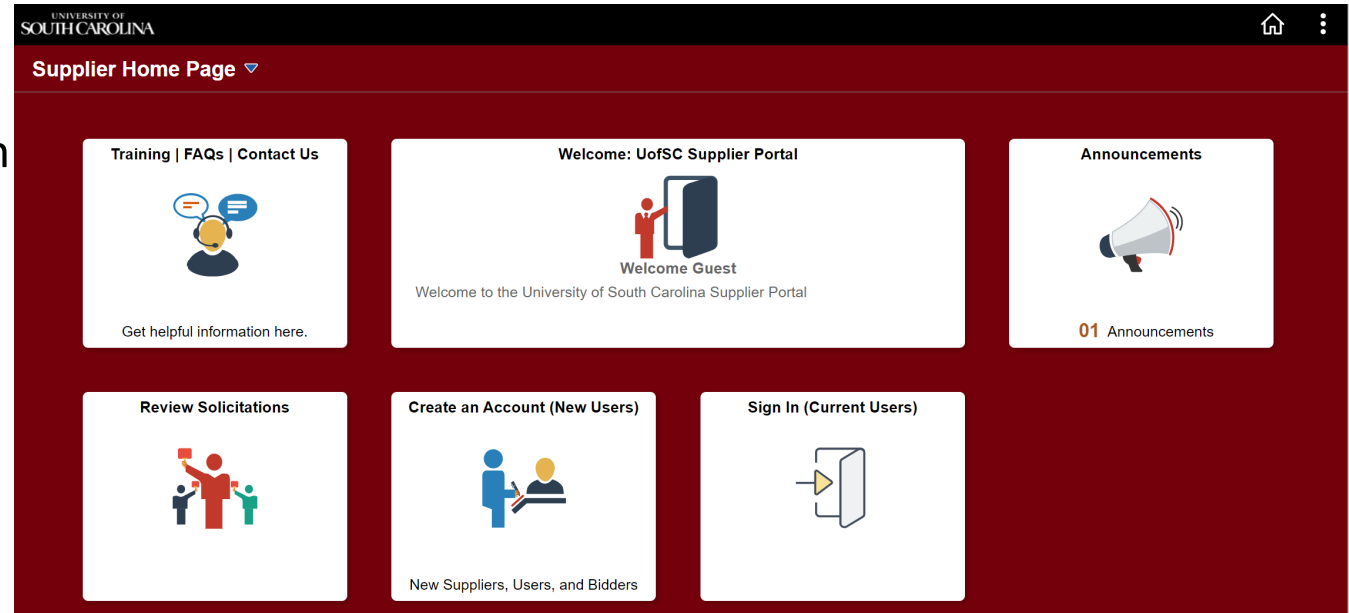
- “Strategic Sourcing” essentially means to *strategically* (competitively) solicit online offers (bids/proposals) from qualified *sources* of supply.
- When a requisition is submitted using the TO BE BID supplier, this alerts Purchasing that strategic sourcing is needed.
- A Solicitation “Event” is created by the buyer, which the requisition lines are copied into.
- After the Event is analyzed and awarded to a supplier/offeror, a Procurement Contract and/or Purchase Order is generated in PeopleSoft.



# STRATEGIC SOURCING

The Purchasing website has an overview for both university and vendor communities which includes:

- Important Information for USC Employees
- Announcement of the New Online Solicitation System
- Supplier Portal link <https://supplier.ps.sc.edu/>



➔ Training resources to assist new Offerors and current Suppliers with the Supplier Portal and UofSC's Solicitation

Opportunities will be available in the **New Solicitation System** section of our **Purchasing Toolbox**.

**Offeror Registration** - This guide outlines the process for prospective suppliers to become "Offerors" in the USC solicitation system.

**Supplier ID Request** - This guide outlines the necessary steps for a current USC Supplier to request a User ID using the USC Solicitation System.

# STRATEGIC SOURCING

- A query exists on two pages to assist users in finding Solicitation Event numbers and the buyers managing the solicitation.
- On the Manage Requisitions page, right-click on the Requisition ID field, then click the Event Req XREF query.

## Manage Requisitions

### ▼ Search Requisitions

To locate requisitions, edit the criteria below and click the Search button.

Business Unit	<input type="text" value="USC01"/>	Requisition Name	<input type="text"/>
Requisition ID	<input type="text" value="1000058819"/>	Request State	<input type="text" value="All but Complete"/>
Date From	<input type="text"/>	Date To	<input type="text" value="05/19/2021"/>
Requester	<input type="text"/>	Entered By	<input type="text"/>
		Budget Status	<input type="text"/>
		PO ID	<input type="text"/>

**Related Information**

- Event Req XREF



# STRATEGIC SOURCING

On the Requisitions Details page, find the Event Req XREF query in the Related Content link.

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All Search >> Advanced Search Last Search Results

Related Content ▾ |

Event Req XREF

## Requisition Details

[Requisition Summary](#)

Business Unit	USC01	Requisition Name	QS-1 Q-Stress ECG
Date	03/10/2021	Requisition ID	1000058819 FAMIS Work Order
Request State	PO(s) Dispatched	Total Amount	25,100.00 USD
Requested For		Pre-Encumbrance Balance	5744.01 USD

Approval Justification  
SOLICITATION

# STRATEGIC SOURCING

- The Related Content section will open at the bottom of the page.
- The Requisition ID will populate into the query from Manage Requisitions if there was already a number entered in that field.
- It will automatically populate on the Requisitions Details page.
- Click the View Results button to see which Event ID the Requisition ID is associated to, as well as the Event Buyer's name, email address, and other event information.

▼ **Related Content** Event Req XREF

[SC\\_SS\\_EVENT\\_REQ\\_XREF\\_RC - Event/Req Cross Reference](#)

Requisition ID

Event ID

[View Results](#)

Download results in : [Excel SpreadSheet](#) [CSV Text File](#) [XML File](#) (1 kb)

[View All](#) First 1-2 of 2 Last

Row	Requester Name	Requester Email	Requisition ID	Requisition Line	Event ID	Event Status	Start	Finish	Event Name	Event Line	Buyer Name	Buyer Email
1	Daniel Rabon	DR34@mailbox.sc.edu	1000070158	1	230123-01	Awarded	01/18/2023 12:30:00PM	02/07/2023 11:00:00AM	Woodward Delphi or Equivalent Outdoor Chairs	1	Kristen Moss	KBMOSS@mailbox.sc.edu
2	Daniel Rabon	DR34@mailbox.sc.edu	1000070158	2	230123-01	Awarded	01/18/2023 12:30:00PM	02/07/2023 11:00:00AM	Woodward Delphi or Equivalent Outdoor Chairs	2	Kristen Moss	KBMOSS@mailbox.sc.edu



# CLOSING FY22-23 PO'S

- Continue sending close PO requests to [purchasing@sc.edu](mailto:purchasing@sc.edu).
- If a PO is fully matched and has a \$0 encumbrance, it will be closed, no need to send a request to close.
- Only send requests to close a PO if all invoices have been paid.
- Closed PO's with remaining funds will be released to the general ledger.
- PO's that are not closed and still have an encumbrance balance will be rolled into the new fiscal year.
- Use PO Inquiry to review PO information: *Purchasing > Purchase Orders > Review PO Information > Purchase Orders*



# FISCAL YEAR CUTOVER

- **June 16<sup>th</sup>** @ 12 PM – Approved Requisition period for FY22-23 closes.
- **June 19<sup>th</sup>** - You may begin entering FY23-24 Requisitions entered on June 19<sup>th</sup> or later will carry over into FY24.
- After the fiscal year PO Roll processes are performed, all FY22-23 requisitions will have a status of “complete” meaning the requisition is closed and can no longer be modified. Remember the PO is still valid.





# PURCHASE ORDER ROLL TO FY23-24

All Purchase Orders from FY22-23 will be rolled into FY23-24 on **Thursday, July 6, 2023**. This means:

- All remaining PO encumbrances for FY22-23 will be liquidated and carried forward into FY23-24.
- All requisition lines that were created in FY22-23 will no longer be linked to their corresponding PO lines. The consequences of this is that **change requests** for these line items will not be possible. At that point only new requisition lines can be created and manually added to existing PO's.



# CONTACT US

Purchasing Receptionist Phone #: (803)777-4115

Purchasing mailbox: [purchasing@sc.edu](mailto:purchasing@sc.edu)

Consolidated Services: (803)777-2156 or (803) 777-9001

A listing of Purchasing staff and their contact information is located on the Purchasing website:

[https://sc.edu/about/offices\\_and\\_divisions/purchasing/index.php](https://sc.edu/about/offices_and_divisions/purchasing/index.php)



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# THANK YOU!

If you have additional questions, please  
send an email to [purchasing@sc.edu](mailto:purchasing@sc.edu)



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