

# PURCHASING HIGHLIGHTS

May 20, 2020



# AGENDA

- COVID-19 PPE Supplies
- Amazon Business
- Closing FY19-20 PO's
- Fiscal Year Cutover
- Blanket PO's for FY20-21
- Purchase Order Roll to FY20-21
- Budget Checking Change Requests
- Future Webinars / Training

# COVID-19 PPE SUPPLIES

[https://sc.edu/about/offices\\_and\\_divisions/purchasing/covid19\\_supplies/index.php](https://sc.edu/about/offices_and_divisions/purchasing/covid19_supplies/index.php)

Purchasing Home

➤ **COVID-19 Supplies**

Our Staff

Solicitations and Awards

Procurement Card

Purchasing Toolbox

Small and Minority Business

Consolidated Services

Sustainable Initiatives

## COVID-19 Supplies

In the wake of the novel coronavirus pandemic, many items related to personal care have been in high demand across the entire university. In an effort to assist our staff in planning for upcoming Personal Protection Equipment (PPE) needs, the Purchasing Department has been working to establish multiple supply sources for these items for everyone's health and safety upon return to campus operations.

## Plan for dispersing supplies for return to work during COVID-19

May 19, 2020

Since the University's closing, the Purchasing and Facilities Services teams have been working diligently to ensure the safety of our campuses in preparation for our return. We have been analyzing campus needs and navigating a volatile market to ensure that each person has what is needed to promote a healthy environment with regard to the current pandemic.

As we draw closer to the return of faculty and staff, our plans to meet these needs are as follows.

# AMAZON BUSINESS

- Program went live with initial wave of account invitations issued March 3, 2020
- Eligible users are full-time employees with a valid procurement card issued by Bank of America and authorized by Purchasing
- New users must complete the Terms of Use agreement to be invited to activate an account
- All policies and restrictions related to the p-card apply to the use of Amazon Business.

# AMAZON BUSINESS

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

Procurement Card

➤ **Purchasing Toolbox**

Small and Minority Business

Consolidated Services

Sustainable Initiatives

State Contracts

Purchasing Forms

Purchasing Resources

Procurement Card Resources & Forms

**Amazon Business**

[Terms of Use Form \[pdf\]](#)

- [Guidance for filling out the Terms of Use form \[pdf\]](#)

[New User Registration Guide \[pdf\]](#)

[End User FAQ Library \[pdf\]](#)

[Amazon Business Overview \[pdf\]](#)

# CLOSING FY19-20 PO'S

- Continue sending close requests to [purchasing@sc.edu](mailto:purchasing@sc.edu).
- If a PO is fully matched and has a \$0 encumbrance, it will automatically be closed, so there is no need to request it.
- Only send requests to close a PO if you are 100% sure that all invoices have been paid and you do not need the PO to remain active.
- Any funds that are remaining on a PO will be rolled into the new fiscal year if you do not request it be closed.
- Use PO Inquiry to review PO information: *Purchasing > Purchase Orders > Review PO Information > Purchase Orders*

# FISCAL YEAR CUTOVER

- The planned fiscal year cutover period begins Monday, June 22, 2020.
- The last day for requisitions to be entered for FY19-20 will be Friday, June 19.
- At close of business on June 19<sup>th</sup>, no more requisitions or PO's will be created in FY19-20.
- All requisitions and PO's created after June 19<sup>th</sup> should be for supplies and services that do not require payment until after July 1<sup>st</sup>.

# BLANKET PO'S FOR FY20-21

- An early period for blanket order requisitions will begin **Monday, June 8, 2020**.
- This means **ONLY** blanket orders intended for FY20-21 can be created and submitted on June 8<sup>th</sup> forward.
- These requisitions will be placed on hold prior to being sourced to purchase orders, and they will all be dispatched on July 1, 2020.
- It is imperative that a requisition intended to be a FY20-21 blanket order PO must have an explicit description and comments identifying the requisition as a FY20-21 blanket order.
- Purchasing's staff will be required to stage these requisitions separately from all other FY19-20 requisitions so that they do not get released in or encumber funds in FY19-20.



# PURCHASE ORDER ROLL TO FY20-21

All Purchase Orders from FY19-20 will be rolled into FY20-21 on Wednesday, July 8, 2020. This means:

- All remaining PO encumbrances for FY19-20 will be liquidated and carried forward into FY20-21.
- All requisition lines that were created in FY19-20 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.

# BUDGET CHECKING CHANGE REQUESTS


- Change requests are defined as changes to an existing requisition line that has previously been sourced to a purchase order.
- Change requests require the requisitioner to budget check their edited requisition, just as a new requisition would need to be budget checked.
- To ensure that a changed requisition is routed to the Buyer's worklist for the associated purchase order, the requisition must be Budget Checked after the requisition is submitted for approval.
- Failure to budget check a change request can delay the processing of the PO change order.

# BUDGET CHECKING CHANGE REQUESTS

## Requisitions <sup>?</sup>

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         |                                                                                                     |
|--------------|----------------------|-------|------------|---------------|--------|---------------|-----------------------------------------------------------------------------------------------------|
| ▼ 1000054269 | NRCCUA Inquiry Cloud | USC01 | 05/08/2020 | Pending       | Valid  | 25,500.00 USD | [Select Action]  |

**Requester** Kristin Elizabeth Freestate      **Entered By** Kristin Elizabeth Freestate      **Priority** Medium

**Pre-Encumbrance Balance** 0.00 USD

**Request Lifespan:**



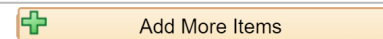
Requisition   Approvals   Inventory   Purchase Orders   Change Request   Receiving   Returns   Invoice

- [Select Action]
- Approvals
- Cancel
- Copy
- Edit**
- View Print
- [Select Action]


# BUDGET CHECKING CHANGE REQUESTS

Cart Summary: Total Amount 25,500.00 USD

Expand lines to review shipping and accounting details

 Add More Items

## Requisition Lines ?

| Line                       | Description                                                                                                      | Item ID | Supplier                               | Quantity                            | UOM  | Price                                     | Total    | Amt Only                            |
|----------------------------|------------------------------------------------------------------------------------------------------------------|---------|----------------------------------------|-------------------------------------|------|-------------------------------------------|----------|-------------------------------------|
| <input type="checkbox"/> 1 |  NRCCUA Inquiry Cloud: Client # |         | NATIONAL RESEARCH CENTER FOR COLLEGE & | <input type="text" value="1.0000"/> | Each | <input type="text" value="25,500.00000"/> | 25500.00 | <input checked="" type="checkbox"/> |

Select All / Deselect All

Select lines to:

 Add to Favorites

 Add to Template(s)

 Delete Selected

 Mass Change

Total Amount 25,500.00 USD  
Pre-Encumbrance Balance 0.000 USD

# BUDGET CHECKING CHANGE REQUESTS

| Quantity                            | UOM  | Price                                     | Total    | Amt Only                            |
|-------------------------------------|------|-------------------------------------------|----------|-------------------------------------|
| <input type="text" value="1.0000"/> | Each | <input type="text" value="35,500.00000"/> | 25500.00 | <input checked="" type="checkbox"/> |

[Template\(s\)](#)

 [Delete Selected](#)

 [Mass Change](#)

Total Amount 25,500.00 USD


Pre-Encumbrance Balance **0.000** USD


 [Check Budget](#)

 [Pre-Check Budget](#)

Budget Checking Status: **Valid**

 [Save & submit](#)

 [Save for Later](#)

 [Add More Items](#)

# BUDGET CHECKING CHANGE REQUESTS

Number of Lines 1  
Total Amount 35,500.00 USD  
Pre-Encumbrance Balance 0.000 USD

**Approval Justification**  
Exemption # 118 Copyrighted Educational Data Bases And Other Related Materials Made Available By Information Technology That Can Only Be Obtained From The Company Providing The Information Or Services.

 [Check Budget](#)

 [Pre-Check Budget](#)

Number of Lines 1  
Total Amount 35,500.00 USD  
Pre-Encumbrance Balance 10000.00 USD

**Approval Justification**  
Exemption # 118 Copyrighted Educational Data Bases And Other Related Materials Made Available By Information Technology That Can Only Be Obtained From The Company Providing The Information Or Services.

 [Check Budget](#)

 [Pre-Check Budget](#)

# BUDGET CHECKING CHANGE REQUESTS

## Requisitions <sup>?</sup>

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         |                   |    |
|--------------|----------------------|-------|------------|---------------|-----------|---------------|-------------------|----|
| ▼ 1000054269 | NRCCUA Inquiry Cloud | USC01 | 05/08/2020 | Pending       | Not Chk'd | 35,500.00 USD | [Select Action] ▼ | Go |

**Requester** Kristin Elizabeth Freestate      **Entered By** Kristin Elizabeth Freestate      **Priority** Medium

**Pre-Encumbrance Balance** 0.00 USD

**Request Lifespan:**

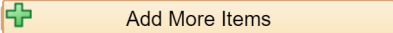
- [Select Action] ▼
- Approvals
- Check Budget
- Copy
- Edit
- PreCheck Budget
- View Print

| Req ID       | Requisition Name     | BU    | Date       | Request State | Budget | Total         |                   |
|--------------|----------------------|-------|------------|---------------|--------|---------------|-------------------|
| ▼ 1000054269 | NRCCUA Inquiry Cloud | USC01 | 05/08/2020 | Pending       | Valid  | 35,500.00 USD | [Select Action] ▼ |


# BUDGET CHECKING CHANGE REQUESTS

Cart Summary: Total Amount 25,500.00 USD

Expand lines to review shipping and accounting details

 Add More Items

## Requisition Lines

| Line                       | Description                                                                                                      | Item ID | Supplier                               | Quantity                            | UOM  | Price                                     | Total    | Amt Only                            |
|----------------------------|------------------------------------------------------------------------------------------------------------------|---------|----------------------------------------|-------------------------------------|------|-------------------------------------------|----------|-------------------------------------|
| <input type="checkbox"/> 1 |  NRCCUA Inquiry Cloud: Client # |         | NATIONAL RESEARCH CENTER FOR COLLEGE & | <input type="text" value="1.0000"/> | Each | <input type="text" value="25,500.00000"/> | 25500.00 | <input checked="" type="checkbox"/> |

Select All / Deselect All

Select lines to:

 Add to Favorites

 Add to Template(s)

 Delete Selected

 Mass Change

Total Amount 25,500.00 USD  
Pre-Encumbrance Balance 0.000 USD



# BUDGET CHECKING CHANGE REQUESTS

Line Description

▶ 1  NRCCUA Inquiry Cloud: Client #

### Item Details

\*Item Description

\*Price

\*Currency

\*Quantity

\*Unit of Measure

\*Category

Due Date

# BUDGET CHECKING CHANGE REQUESTS

| Quantity                            | UOM  | Price                                     | Total    | Amt Only                            |
|-------------------------------------|------|-------------------------------------------|----------|-------------------------------------|
| <input type="text" value="1.0000"/> | Each | <input type="text" value="35,500.00000"/> | 35500.00 | <input checked="" type="checkbox"/> |

Template(s) Delete Selected Mass Change

Total Amount 35,500.00 USD  
Pre-Encumbrance Balance **0.000** USD

[Check Budget](#)

[Pre-Check Budget](#)

Budget Checking Status: **Not Checked**

Save & submit

Save for Later

Add More Items

This action will restart the approval process. Click OK to continue, or click Cancel to go back. (18036,12207)

# BUDGET CHECKING CHANGE REQUESTS

Number of Lines 1  
Total Amount 35,500.00 USD  
10000.00 USD

## Approval Justification

Exemption # 118 Copyrighted Educational Data Bases And Other Related Materials Made Available By Information Technology That Can Only Be Obtained From The Company Providing The Information Or Services.




Check Budget



Pre-Check Budget

# FUTURE WEBINARS / TRAINING

[https://sc.edu/about/offices\\_and\\_divisions/peoplesoft\\_finance/internal/training/](https://sc.edu/about/offices_and_divisions/peoplesoft_finance/internal/training/)

| What                                                                                                                                        | When                                  | How Long | Where          |
|---------------------------------------------------------------------------------------------------------------------------------------------|---------------------------------------|----------|----------------|
| <a href="#"><u>Cash Advance and Prepaid Card Programs Webinar</u></a>                                                                       | Tuesday, May 26<br>9 a.m. - 10 a.m.   | 1 hour   | Online Webinar |
| <a href="#"><u>2019-2020 Fiscal Year End Webinar</u></a>                                                                                    | Thursday, May 28<br>9 a.m. - 10 a.m.  | 1 hour   | Online Webinar |
| <a href="#"><u>Requisition and Receiving Training</u></a>  | Tuesday, June 2<br>9 a.m. - 12 p.m.   | 3 hours  | Online Webinar |
| <a href="#"><u>2019-2020 Fiscal Year End Webinar</u></a>                                                                                    | Wednesday, June 3<br>9 a.m. - 10 a.m. | 1 hour   | Online Webinar |

**THANK YOU!**  
**WASH YOUR HANDS!!** 😊

**Mac Stiles**

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