



South Carolina

Purchasing Highlights

June 2019

- Tax and Freight
- Change Requests
- Approved Requisitions in FY18-19
- New FY Requisitions for FY19-20
- Closing PO's with an Encumbrance Balance
- Blanket PO's for FY19-20
- Purchase Order Roll to FY19-20
- Purchasing Highlights and Upcoming Webinars and Training

Tax and Freight

- ❖ The sales tax is encumbered when the Purchase Order is created. The Category carries the tax applicability of the line item.
- ❖ Freight information should not be represented as a line item. Include this information in the Comments, preferably the Header area.

Change Requests



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Change requests require the requisitioner to budget check their edited requisition.

In order for the change request to route to the PO Buyer after it is approved in the requisition workflow, the change request must be budget checked.



Approved Requisitions for FY18-19

**Last Date to Enter Requisitions
for FY18-19 is this **Friday by 12 noon:****

June 21st

Future Fiscal Years Requisition Cutover

2020 – June 19

2021 – June 22

2022 – June 22

2023 – June 22

*These dates are the last day to enter requisitions to be included in the referenced fiscal year.

Requisitions in FY18-19

- Most requisitions not sourced to a PO and created in the first 10 months of this FY have been cancelled.
- Review your pending requisitions.
- There were 76 Requisitions pending approval end of business June 17th. If they are not approved or any created since that time, they will be cancelled on June 21st and you will need to create them again on June 24th.

Requisitions in FY18-19

- All approved requisitions will be assigned to Purchasing a buyer June 21st.
- By assigning the requisition to a Purchasing Buyer, this moves your pre-encumbered funds to encumbered funds (as long as your budget is valid).

**You can begin to Enter Requisitions
for FY19-20:**

June 24th

Money, Money, Money

(Closing PO's with an Encumbrance Balance)

CLOSE PURCHASE ORDERS

Make sure payment has been processed before requesting a Purchase Order to be closed, then send an e-mail to Purchasing: purchasing@sc.edu



Blanket Purchase Orders

Blanket Purchase Orders (BPO)

- Multiple invoices/vouchers issued per Budget period/year each year.
- When creating the requisition, begin with “Blanket Order” then a general description of the goods/services being purchased.
- BPO is to be charged to one Account or one Accounting Distribution line per line item.
- BPOs are valid for 1 year and will be closed out each fiscal year.
- BPOs over \$10,000.00 (not state contracts) must be distributed equitably among qualified suppliers.
 - Purchases should alternate between other qualified suppliers. For example if you are a department that uses food for events during the fiscal year, you would create 2 requisitions – one to Food Lion and one to Piggly Wiggly.

Blanket Purchase Orders

Check the Amt Ony box for all Blanket Purchase Orders. Also, you should check this box for all services with a quantity of 1.

Edit Requisition - Review and Submit

<u>Supplier</u>	Quantity	Price	Total	Amt Only
XEROX CORPORATION	1.0000	1,770.00000	1770.00	<input checked="" type="checkbox"/>

If the box is not checked on blanket orders or services with a quantity of 1, your requisition may be denied.

When can we enter the requisition for a Blanket Purchase Order (BPO)?

JUNE 24th

When does the Supplier get the Purchase Order?

Once the Purchasing Buyer has reviewed the requisition for the procurement method, the PO will be dispatched to the Supplier, as long as there is a valid e-mail address in PeopleSoft.

JULY 10

A "rolled" PO means it moves from one fiscal year to the next fiscal year.

Purchasing Highlights

Upcoming Purchasing Highlights webinars:

- **July 25th – 9 am**
- **November 6th – 9 am**
- **March 4th – 9 am**
- **June 3rd – 9 am**

Upcoming Classes for New Requisitioners

Upcoming Training Schedule for Requisitions and Receiving:

- Tuesday, July 9th, 9 AM – 12 PM
- Tuesday, August 6th, 9 AM – 12 PM

If an extra class is needed,
we will be glad to add an
additional class.



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PeopleSoft Training Schedule - Session Dates and Times

What	When	How Long	Where
Travel and Expense - Proxy Training ↗	Wednesday, June 12 9am - 3pm	6 hours	1600 Hampton Street, Suite 609
HCM and What it Means for the Grant Community To enter this webinar, click here .	Wednesday, June 12 11am - 12pm	1 hour	Online (webinar)
Purchasing Highlights ↗	Wednesday, June 19 9am - 10am	1 hour	Online (webinar)
Requisition and Receiving Training ↗	Tuesday, July 2 9am - 12:30pm	3.5 hours	1600 Hampton Street, Suite 605
Travel and Expense - Proxy Training ↗	Wednesday, July 17 9am - 2pm	5 hours	1600 Hampton Street, Suite 609
Travel and Expense - Proxy Training ↗	Wednesday, August 14 9am - 2pm	5 hours	1600 Hampton Street, Suite 609

Additional Questions



- If you have any additional questions please email them to purchasing@sc.edu
- For all other questions go to the [Contact Us](#) page and email them to the appropriate department.
- This presentation will also be available to download on the PeopleSoft [Purchasing Training Related Resources website](#).

thank you!