



South Carolina

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# Purchasing Highlights

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February 2020

- Business Managers Update
- Manage Requisitions
- Negative Lines
- Mass Change
- PO Inquiry
- Reminders:
  - Purchases under \$5,000
  - Small Purchase Procedure
- Upcoming Webinars and Training



## The 3rd Annual Business Managers Update


- **When:** March 11th, 9 am – 1 pm
- **Where:** School of Law – Karen J. Williams Courtroom
- **Topics:** What Not to Do & Consequences; DoIT; MBE Reporting; Printing & Copier; P-Card; Exciting Things to Come





## How do I know the status of my requisition?

Favorites ▾ Main Menu ▾ > eProcurement ▾ > Manage Requisitions

- 1) Enter the requisition ID #
- 2) Click the  button
- 3) Click the grey arrow next to the blue ID # to expand the requisition and its activity (note: Approved requisition doesn't mean there is an approved PO)

### 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	
1000052467	Conversion Kit for door...	USC01	12/20/2019	Received	Valid	7,200.26 USD	[Select Action]

Requester Brenda Sue Racine  
Pre-Encumbrance Balance

Entered By Brenda Sue Racine  
0.00 USD

Priority High



### Request Lifespan:

### Line Information

Line	Description	Status	Price	Currency	Quantity	UOM	Supplier
1	Von Duprin - 958003-00 33/35...	Received	720.0260	USD	10.0000	EA	DOUBLE O ENTERPRISES

## Negative Lines

- Recently there have been Negative Lines entered as a requisition line. When a negative amount is entered there are issues with the General Ledger. We have been asked to remind everyone not to enter negative dollar amounts on a line. If you have entered a negative line, it will be cancelled or deleted.



## Checkout - Review and Submit

### Line Information [?](#)

Note: The information below does not reflect the data in the selected requisition lines. When the 'OK' button is clicked, the data entered on in the corresponding fields on the selected lines that are available for sourcing.

Supplier ID

Supplier Location

Buyer

Category

### Shipping Information

Ship To Location

[Add One Time Address](#)

Due Date

Attention

Ship Via

Freight Terms

Comments

### Accounting Lines

SpeedChart

Please enter GL Business Unit before selecting other chartfield values

### Accounting Information



Chartfields1

Details

Asset Information



Dist	Percent	Location	GL Unit	Oper Unit	Dept	Fund
1	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>



Mass Change

- 
- Use the mass change page to make changes to one or more requisition lines.
  - Select all lines to be changed, then click the “Mass Change” link. Enter values in any field requiring a change then click “OK” to apply the changes to the selected lines.
  - SpeedChart is available on the mass change page to quickly populate accounting chartfields.

## Some highlights of the PO Inquiry Page:

- Document Status
- Activity Summary
- Actions – Related Information

[Activity Summary](#)  
[Header Comments...](#)  
[Document Status](#)  
[▼ Actions](#)

### Related Information

[Approval Comments](#)

Approval Routings

Line Cat Exception

Line Not in Xwalk

Voucher Totals

Activity Comments

KK Budget Dates

Vchr Retainage

Change History



## Document Status

On the Purchase Order Inquiry page you can view Document Status (lifespan) of your requisition by clicking the [Document Status](#) link:

### Document Status

Business Unit	USC01	PO ID	<a href="#">2000041118</a>
Document Date	07/10/2018	Status	Compl
Currency	USD	Document Type	Purchase Order
Buyer	Lana Widener	Merchandise Amt	65,000.00
		Budget Status	Valid



\*Note: The Purchase Orders icon will be grey because that is the page you would actually be on when viewing the Document Status. When clicking another document type, its corresponding icon would also be greyed out.

## Activity Summary

**How to view the activity of your Purchase Order amount receipted, invoiced and matched.**

1 – Navigate to Purchase Order Inquiry search page:

Main Menu ▾ > Purchasing ▾ > Purchase Orders ▾ > Review PO Information ▾ > Purchase Orders

2 – Type your PO # in the PO ID field

3 – Click the  button to open the PO

4 – Find and click [Activity Summary](#) link in the **Header** section

5 – This will open a new tab/window named **Activity Summary** that displays line details, merchandise receipted, invoices entered, and what's been matched in PeopleSoft.

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## Activity Summary

6 – Below is an example of the Activity Summary:

### Activity Summary

<b>Business Unit</b>	USC01
<b>Purchase Order</b>	2000051383
<b>Merchandise Amount</b>	635.08 USD
<b>Merchandise Receipt</b>	635.08 USD
<b>Merchandise Returned</b>	0.00 USD
<b>Merchandise Invoice</b>	635.08 USD
<b>Merchandise Matched</b>	635.08 USD

## 7 – Line Details, Receipt, Invoice, Matched tabs:

### Lines

<div> <div></div> <div></div> </div>			
<div> <div>Details</div> <div>Receipt</div> <div>Invoice</div> <div>Matched</div> <div>RIV</div> <div>  ▶</div> </div>			
Line▲		Item	Item Description▲
1			HP 410A (CF410A) Black Origina
2			HP 410A (CF411A) Cyan Original
3			HP 410A (CF412A) Yellow Origin
4			HP 410A (CF413A) Magenta Origi

### Lines

<div> <div></div> <div></div> </div> <div>1-4 of 4</div>								
<div> <div>Details</div> <div>Receipt</div> <div>Invoice</div> <div>Matched</div> <div>RIV</div> <div>  ▶</div> </div>								
Line▲		Item	Item Description▲	UOM	Qty Received▲	Qty Accepted	Open Quantity	
1			HP 410A (CF410A) Black Origina	EA	2.0000	2.0000	0.0000	
2			HP 410A (CF411A) Cyan Original	EA	2.0000	2.0000	0.0000	
3			HP 410A (CF412A) Yellow Origin	EA	2.0000	2.0000	0.0000	
4			HP 410A (CF413A) Magenta Origi	EA	4.0000	4.0000	0.0000	

## 8— Line Details, Receipt, **Invoice**, **Matched** tabs:

**Lines**

☰ 🔍 1-4 of 4 ▾

Details Receipt **Invoice** Matched RIV ||▶

Line▲		Item	Item Description▲	UOM	Quantity Invoiced	Amount Only	Amt Invoiced
1			HP 410A (CF410A) Black Origina	EA	2.0000	<input type="checkbox"/>	103.000
2			HP 410A (CF411A) Cyan Original	EA	2.0000	<input type="checkbox"/>	133.020
3			HP 410A (CF412A) Yellow Origin	EA	2.0000	<input type="checkbox"/>	133.020
4			HP 410A (CF413A) Magenta Origi	EA	4.0000	<input type="checkbox"/>	266.040

**Lines**

☰ 🔍 ▶

Details Receipt Invoice **Matched** RIV ||▶

Line▲		Item	Item Description▲	UOM	Qty Matched	Amt Matched
1			HP 410A (CF410A) Black Origina	EA	2.0000	103.000
2			HP 410A (CF411A) Cyan Original	EA	2.0000	133.020
3			HP 410A (CF412A) Yellow Origin	EA	2.0000	133.020
4			HP 410A (CF413A) Magenta Origi	EA	4.0000	266.040

**100%**

**Matched!**

## Actions ➡ Related Information

Click the **Actions** link, and you can select from any of the following queries:

Whenever you click the **Actions** link, the system will run all of the queries in the **Related Information** list. This will take about 15 seconds. After you select an option, the results will be displayed in a **Related Content** split-screen area at the bottom of the page. You will then see tabs for all of the other queries, if you need to view those as well.

### Related Information

Line Not in Xwalk

Line Cat Exception

Approval Routings

Approval Comments

Voucher Totals

KK Budget Dates

Vchr Retainage

Change History

Accounting Details



## Actions ➡ Related Information

PO Date 01/27/2020  
Supplier Name EXPRESSLUB-001

Supplier ID 0000000140

Buyer Michelle Carrera

PO Reference Online Src From Req 1000052817

[Header Details](#)  
[All RTV](#)  
[Matching](#)

[Supplier Details](#)

[Activity Summary](#)  
[Header Comments](#)  
[Document Status](#)  
[▼ Actions](#)

Doc Tol Status Valid

Backorder Status Not Backordered

Receipt Status Received

☐ Hold From Further Processing

### Amount Summary

Merchandise	66.79
Freight/Tax/Misc.	1.88
Total	68.67 USD
Encumbrance Balance	0.06 USD

▼ Related Content	Approval Comments	Approval Routings	Line Cat Exception	Change History	Activity Comments	KK Budget Dates
	Line Not in Xwalk	Voucher Totals	Vchr Retainage			

### SC\_PO\_VOUCHER\_AMOUNT\_RC- PO Line Voucher Amounts

Download results in : [Excel Spreadsheet](#) [CSV Text File](#) [XML File](#) (4 kb)

View All

First 1-6 of 6 Last

	PO ID	PO Line	PO Dist	Voucher	Invoice Number	Accounting Date	Voucher Line	Voucher Dist	Voucher Quantity	Total Amount	Account	Oper Unit	Dept	Fund	PC Bus Unit	Project	Merch Amount	Misc Amount	Freight Amount	Sales Tax	Use Tax	Finalized PO?	Budget Line Status	Voucher Close Status	KK Process PO Line
1	2000051709	1	1	01760241	0219941	01/31/2020	1	1	1.0000	19.990	52070	UP000	987012	A0001			19.990	0.000	0.000	0.000	0.000	N	V	Open	Y
2	2000051709	2	1	01760241	0219941	01/31/2020	2	1	1.0000	19.750	52070	UP000	987012	A0001			19.750	0.000	0.000	0.000	0.000	N	V	Open	Y
3	2000051709	3	1	01760241	0219941	01/31/2020	3	1	1.0000	0.300	52070	UP000	987012	A0001			0.300	0.000	0.000	0.000	0.000	N	V	Open	Y
4	2000051709	4	1	01760241	0219941	01/31/2020	4	1	1.0000	21.300	53008	UP000	987012	A0001			19.950	0.000	0.000	1.350	0.000	N	V	Open	Y
5	2000051709	5	1	01760241	0219941	01/31/2020	5	1	1.0000	6.410	53008	UP000	987012	A0001			6.000	0.000	0.000	0.410	0.000	N	V	Open	Y
6	2000051709	6	1	01760241	0219941	01/31/2020	6	1	1.0000	0.860	53008	UP000	987012	A0001			0.800	0.000	0.000	0.060	0.000	N	V	Open	Y

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## **Purchases Under \$5K**

It is strongly encouraged to utilize the University purchasing card for all transactions with a total value of \$4,999.99 or less. This includes:

- Supplies
- Contractual services
- Memberships
- Fees and dues
- Information technology (computers, toner cartridges, e-devices, and cellular services)

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

*Exceptions:* radioactive materials, food/food supplies, gifts (incentives, awards, trophies), promotional supplies



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## **Purchases Under \$5K**

- The use of the purchasing card eliminates the need for issuing low-dollar purchase orders, reduces blanket purchase orders and minimizes the use of Payment Requests.
- Payment by credit card is cost efficient to the University; and most importantly, vendors get paid expeditiously.
- Be reminded to use state contract providers and spread the wealth by exploring opportunities with local small and minority vendors.

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## Small Purchase Procedure




- In May 2019 the Procurement Code was updated to allow for 3 bona fide written quotes solicited from a minimum of 3 suppliers for procurements between \$10,000 - \$25,000.
- You must have issued a written request (e-mail) to each vendor (with the same wording) and receive no fewer than 3 bona fide written responses on the vendor's letterhead. A "no quote" is not a bona fide quote.
- The solicitation, with any attachments, and written responses, must be submitted by way of attachment to a purchase requisition for Purchasing to evaluate.
- ❖ *Publicly advertised solicitations per the existing Request for Quotations procedures may also be utilized instead, whenever needed or preferred.*



## Upcoming Training Schedule for Requisition and Receiving:

- March 3rd, 9 AM – 12 PM
- April 7th, 9 AM – 12 PM
- May 5th, 9 AM – 12 PM
- June 2nd, 9 AM – 12 PM

If additional classes are needed, they can be added.

What	When	How Long	Where
<a href="#"><u>Travel and Expense Proxy Training</u></a> 	Wednesday, February 12 9 a.m. - 2 p.m.	5 hours	1600 Hampton Street Suite 609
<a href="#"><u>Journal Entry/Journal Voucher eForm Webinar</u></a>	Thursday, February 13 9 a.m. - 10 a.m.	1 hour	Online Webinar
<a href="#"><u>Depositor Training</u></a>	Friday, February 14 10 a.m. - 11 a.m.	1 hour	1244 Blossom Street Suite 308
<a href="#"><u>Payment Request Webinar</u></a>	Wednesday, February 19 9 a.m. - 10:30 a.m.	1.5 hour	Online Webinar
<a href="#"><u>Supplier Webinar</u></a>	Thursday, February 20 9 a.m. - 10 a.m.	1 hour	Online Webinar
<a href="#"><u>AP Upload Webinar</u></a>	Wednesday, February 26 9 a.m. - 10 a.m.	1 hour	Online Webinar
<a href="#"><u>Requisition and Receiving Training</u></a> 	Tuesday, March 3 9 a.m. - 12 p.m.	3 hours	1600 Hampton Street Suite 605
<a href="#"><u>Travel and Expense Proxy Training</u></a> 	Wednesday, March 11 9 a.m. - 2 p.m.	5 hours	1600 Hampton Street Suite 609



- If you have any additional questions, please email them to [purchasing@sc.edu](mailto: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](#).