

Purchasing Services Tips

October 24, 2008

FOR APPROVERS:

a. Receiving a Bid Requisition Again to Approve:

There are several reasons that centrally bid requisitions may be routed back through the approvers even after they have approved the on-line requisition and approved the off-line Bid Referral Form, including:

1. Errors – The requester may need to edit the requisition due to a typo on the requisition or missed step in the CPS process. This may route the requisition back through the approval process.
2. If Purchasing needs to insert an additional row to be able to split a bid to multiple vendors, the new row will cause the requisition to go back through approvals.
3. If Purchasing awards part of a bid and re-bids the remainder of the items for award later, this may also require a new line for the re-bid information and also require approval again.

b. Alert Messages

Be sure to review the Alert Messages in the upper right hand corner of your approval screen.

Approval Status

Req Name: Dbt Mgmt Invest Svcs RFP
Total: 50,000.00 USD
Requester: [JSTRADER](#)
Entered on: 07/24/2008
Status: Pending
Requester's Justification:
Investment banking and underwriting services for the issuance and sale of special purpose taxable bonds by the university up to approximately \$20,000,000. The proceeds of the bonds will be used to finance a portion of the costs

Requisition Alert

•A one time ship to address exists on this requisition
•A vendor does not exist on this requisition
Business Unit: LIMN01
Requisition ID: 0000008372
Priority: High

This will show alerts such as, when a one-time shipment address is used instead of an established ship to location code. These are riskier transactions and should be closely reviewed. Approvers should be aware of the reason a requisition is using a non-standard shipping address.

Another message you may receive is that a vendor does not exist on the requisition. These requisitions should not be approved. The only time it is appropriate to not have a vendor listed is for bid requisitions, and those do not come to the approver until a later step in the process when the bid is complete and the vendor is added.

FOR REQUESTORS WHO ARE ALSO PROCUREMENT SPECIALISTS:

If you are a procurement specialist and also have security to prepare requisitions, you cannot combine both roles on the same requisition. This is especially important on CPS type transactions that you enter. You cannot be both the requestor and procurement specialist who prints and approves the final CPS requisition.

FOR CASUAL RECEIVERS:

If you order an asset through the web tab (e.g., UStores, Dell, Apple) the asset icon will not display during the receipt process. It is still an asset and the casual receiver should advise the procurement specialist to receive the asset.

FOR REQUESTORS:

- Requisition preparers do not have access to a Hold flag on the ePro requisition but the procurement specialist can put the requisition on hold through the Purchasing > Requisition > Add /Update requisition screen. Contact your procurement specialist if you need a requisition put on hold temporarily.
- If you request a change order to reduce the quantity on a purchase order, be sure to advise your procurement specialist what should happen to the quantity that was removed from the purchase order. The quantity removed from the PO is put back on the requisition. At that point a new purchase order may be issued or the requisition may be canceled.
- VCPS vouchers are tied to the procurement specialist identification. When the system creates the voucher on a VCPS requisition, the Voucher Source displays EDI. This indicates it was a system-built voucher for the VCPS transaction. Since there is no voucher specialist entering these transactions, the system assigns the procurement specialist name in the Voucher Summary page as the "Created By" person.