

# Topics

# Finance Liaison Meeting

August 30, 2007 10:00 AM  
Campus Center, Room 917

## Agenda topics

- Ed Trachy's Retirement
- Blanket Order Reduction
- New Marketplace Vendors
- Shortened eProcurement Class for Marketplace Vendors
- Procard Sweep Program Running
- Procard - ThorLabs Security Breach
- Questions & Comments?

### Special notes:

**Ed Trachey:** Ed has retired. A current job search for a Manager of Procurement is ongoing until the position is filled. Please refer any questions to John O. Martin, Director, or Bob Clukay, Assistant Director.

**Blanket Orders:** Blanket orders are not allowed for any Marketplace Vendor. If you can't find an item on the Marketplace, call the Help Desk (5-2119) or call Santo directly (5-1090).

In addition, one of the goals of our department is to reduce blanket orders by 75% by the end of this fiscal year (June 30, 2008).

**Marketplace:** Currently there are 18 vendors (see attached list). We will be adding a 2<sup>nd</sup> round of vendors to the Marketplace in October. Those vendors will cover products for Maintenance, Repair, and Operations (MRO). To date, Graybar and Grainger are confirmed. We are also working with F.W. Webb, Metropolitan Pipe, and MSC.

**Marketplace:** Santo is currently working with some of the departments in the College of Natural Sciences and Mathematics to develop a shorter version of the eProcurement training (about 2-hours) for those who purchase only from Marketplace vendors (WB Mason, Fisher, etc.). Test classes will happen in September and training will begin in the fall. This training is in conjunction with the elimination of Blanket Orders for marketplace vendors.

If this is of interest to your department, please contact Santo (5-1090). These classes are department specific, so some individual development time with each departmental (business managers) is required.

**Procard:** On Friday (night), August 31<sup>st</sup>, the Sweep Program will resume running. This is the program that Final Posts all transactions 30 days or older. The program will run each business day going forward.

**Procard:** There has been a security breach at ThorLabs. This breach has affected a very small number of credit cards. Those affected have already been notified and new cards have been ordered. Until further notice, only Purchase Orders will be allowed for that vendor.

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### Questions & Comments

#### RE: Marketplace prices

- **Q:** Data-entry operators are receiving quotes for orders. Prices on the quotes are lower than prices for the same items on the Marketplace.
- **A:** After following up, it appears that of the two examples given, one item does not appear in the Fisher Marketplace catalog so no comparison could be made. The other item was higher in the Marketplace than on the Fisher web site by \$1.05.
- If you do receive a quote for a price from a Marketplace vendor that is less than on the Marketplace forward a copy of the quote to Procurement, attention Santo. If the price quoted is significant you can place the order thru a description only purchase order to obtain the savings.
- Santo will notify the vendor and work with IT to update the Marketplace.
- **Please note that the marketplace doesn't guarantee the lowest price every time on every item.** Once our prices are known there will be a competitor somewhere that will offer you a lower cost on your item to get your business. If we accept these offers and go off contract we won't have credibility in our future bids. The value of the marketplace is that it offers a broad array of products that are under contract prices, most of which are lower than anywhere else, as well as the ease of sourcing multiple vendors.
- **Please note that if you are purchasing large volumes then it is appropriate to ask for a special quote or bid to obtain the best prices.**

#### RE: Reducing the number of Blanket Orders in system

- **Q:** Why are we cutting back on the number of blanket orders in the system?
- **A:** While blanket orders are convenient to use, they take a significant amount of time to process and create a lot of back-end work/paperwork for data-entry operators, accounts payable clerks, procurement staff, and vendors. In addition, blanket orders do not give the level of detail required for financial reporting.
- Procurement understands that there will always be a business need for some blanket orders. This will be reviewed on a department-by-department basis.

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### Questions & Comments, continued

#### RE: Change Orders

- **Q:** In Version 7.5, Procurement would telephone the department when a Change Order was denied. Now Change Requests are done and denials are transmitted electronically by email. If the Requester is unavailable, the department is unaware that their change did not go through. One example was when a student worker, who worked part time, entered a change order that was denied. The student did not come back in for three days, and the email notification was not addressed in a timely fashion.
- **A:** That is correct, Procurement no longer telephones when a change is complete or denied. When a request is denied, the system requires that the reason for denial be entered. The system then notifies the person who entered the request by email that the request was denied. The user must then inquire on the specific comments for the denial.
- A Business Manager can look up any order, including denied change requests, using the Manage Requisition page. This page allows you to search by both Requisition ID (order/change request) or by User ID. In this same way the Business Manager can also inquire and view any denial comments.
- For change requests that are approved, the change is made directly to the original Purchase Order by a Procurement Department buyer or manager. When the change is complete, the change request itself is canceled. A canceled Change Request (requisition) displays a status of **canceled** or complete on the Manage Requisitions page. A Business Manager could also inquire directly on the Purchase Order or on Change History, which reflects that the change has been made. Changes often are reflected in the line or comments sections of the Purchase Order.
- A PO/AP Inquiry class will be available in the future to train on looking up information in the system.