

February 7, 2008  
Campus Center Auditorium

PO Data Entry Operator Meeting 10:00am to 12:00pm

- Procurement
  - Updated Procurement Web Site - <http://www.umass.edu/procurement/> the site is constantly updated. It has contract information, open bids, awarded bids, surplus equipment bids, buyer assignments, training information. Go out and look! One item to emphasize is surplus equipment. If you have surplus equipment and no other department on campus wants it, a couple of times a year we sell it through sealed bid. Funds go back to the department (as appropriate – grants may not be able to do this – see the website for more information.)
  - Blanket Orders – we'd like to reduce the number of blanket orders. While there will always be a need, please do not enter blankets for marketplace vendors or for goods that could be more easily purchased on procard. If you are not sure, call and we can work with you.
  - WB Mason website – the office supply contract is ending June 30, 2008. The 5 campuses and the Presidents office do this contract together. We are in the process of bidding the new contract so we do not know if the vendor will remain Mason or change. Regardless of who wins the bid, there will not be a website from which you can make purchases on procard. The vendor will be on the marketplace, hopefully with a 'punchout' to a website so contract information is more up to date and accurate than a static catalog. [To read more about the conversation around this topic, see Q&A below]
  - Change Orders – We process an amazing amount of change orders in the system, on average 44 a week. Each of these change orders take time for you to put into the system and can take up to 30 to 45 minutes per request for a Buyer in Procurement to interpret, research, and process. We would like your cooperation to reduce the number of change orders done to save both your time and ours. Here are some suggestions:
    - You no longer need a change order to pay freight because AP can now pay that on the voucher.
    - You do not need to increase a purchase order to match an invoice unless you are contacted by AP and asked to do so.
    - Please let purchase orders pay out and then put a new requisition in the system if you need to. You can reference the old purchase order number in the description; for example, "This purchase order replaces PO 0001XXXXXX."
    - Please try to minimize change orders under \$100.00. We have many change requests for \$20, \$40 or even under \$10.
    - If you find that you need to make a change to a purchase order that has had no vouchering activity against it, please cancel the purchase order and enter a new requisition. It's faster in the long run for all concerned. Again, reference the old purchase order number that the new order replaces.
  - Changes to the Procurement pages – requisition name now carries to the purchase order reference field and the PO reference field can now be used when searching in PO Inquiry. The category and vendor location has been added to the PO approval page.

- Ship To for Chemicals: Effective immediately, all chemicals, including radioactive chemicals, must be routed through the Chemistry Stockroom. Please change the Ship To Code on the Define Req page from the default of DS to CHEMS. The EH&S Ship To code will be deactivated.
- Marketplace Training – We now have a shortened eProcurement training, two hours, for users who will process marketplace orders only. Please see the link on the Procurement website for more detail
- Year End – Good news is last year went well and rollover process was much improved. We may not have to close out as many orders as we did in prior years. *However*, we do not yet know if we will be able to roll purchase orders that have rolled once already a second time, whether we will be able to add requisitions for the next fiscal year before July 1 or what we will be able to do with requisitions that have not yet become purchase orders at year end. Stay Tuned! We have a University wide team together that is working on these issues.

## Questions and Answers

### **Q) What if the item I want is not on the marketplace in the Mason catalog?**

A) Then you can use your procard. We are looking at making the new office supply contract a 'punchout', which is a live site, where we would go to the vendor's website through the marketplace so they can update the items they are offering on a continual basis.

### **Q) When I use procard, delivery is overnight. Marketplace takes 3 to 4 days.**

A) Marketplace orders only require department approval and are dispatched 8 times a day. Therefore you should be getting the same service. If you do not, please call and tell John about it. What could delay a marketplace requisition is timely approval by the department or a budget check error. Unlike procard, requisitions do have to be budget checked prior to going out the door.

### **Q) If I use the marketplace to place all these orders, that will mean all the material comes to me and then has to be sorted out and delivered causing a delay for everyone.**

A) You can change the delivery location on the requisition to specify where it is delivered.

### **Q) Most of the vendors on the marketplace are not relevant for the business I do, so I've never used the marketplace.**

A) We are working to get more vendors up. If there is a vendor you think should be there, let us know and we can contact them to determine if they should be on the marketplace.

### **Q) Won't moving away from procard impact AP because now there will be invoices?**

A) No, because marketplace vendors send their invoices electronically.

### **Q) Well, then what if something is wrong with my order, how soon will AP pay?**

A) AP will pay in the standard 30 days. However, Mason sends credits so whatever process you would have followed if a purchase was wrong on procard, you would follow with a purchase order. Instead of crediting the procard, they send a credit to AP. On the Procard a vendor gets paid within 72 hours.

**Q) You mentioned how your procurement website saves phone calls, administrative work of mailing bids, and other things to free your office up to work on other issues. How is using the marketplace and not a procard going to do this for me? It seems like it will be adding work so I can't do things I used to do.**

-- People gave extensive feedback on the impact of no Procard for office supplies --

A) We have really heard all that you've had to say about this and we will be taking all of your comments and suggestions into consideration. We will also be trying to look at a whole range of options with the new contract that will make it easier to use from an end user's standpoint.

**Q) Have you thought about talking to some of us to get feedback about the marketplace and what the issues are? Like a focus group?**

A) We have been asking for, and receiving, feedback on a regular basis. We will try to get a group together in the not too distant future to review what is being planned.

**Q) Marketplace training: did you mention the person doing the entry has to change the speedchart?**

A) We conduct the marketplace only training on a department by department basis so the department can decide what parts have to be done. You can decide that people must put in the correct speedchart or we can default it in. You can decide on standards of what you want entered and when the training is conducted we weave that into the training.

**Q) For change orders, is there a percent over the PO that AP will pay?**

A) Yes, for most supply orders it is a percentage. We are doing some analysis to see if we can raise those.

- PO/AP Inquiry training session – A quick version of PO/AP Inquiry training was conducted. We will set up additional trainings which will be offered to anyone who wants to know more about PO/AP inquiry. If you are interested, please email Patty Roper at [roper@admin.umass.edu](mailto:roper@admin.umass.edu)