



**Shepherd**  
UNIVERSITY

Procurement Services Office  
Ikenberry Hall  
Room 217  
P: 304-876-5216

# What's New in Procurement?

Procurement Users' Group Meeting  
September 16, 2019



**Shepherd**  
UNIVERSITY

Procurement Services Office  
Ikenberry Hall  
Room 217  
P: 304-876-5216

# What's New in Procurement?

## Agenda

- I. Staff Changes/Responsibilities
- II. Procurement to Pay Process
- III. Banner to Oasis Funding
- IV. Procurement Website

# What's New in Procurement?



Procurement Services Office  
Ikenberry Hall  
Room 217  
P: 304-876-5216

## Procurement Staff

- Debra Langford – Executive Director
- Ty Eubanks – Assistant Director
- Kathy Anderson – Travel & P-Card Coordinator
- Michelle Bane – Accounts Payable & P-Card Coordinator
- Joi Gyasi – Buyer/P-Card Coordinator

# What's New in Procurement?



Procurement Services Office  
Ikenberry Hall  
Room 217  
P: 304-876-5216

## Procurement to Pay Process

### What is it?

Process in which Shepherd University will go about procuring goods and/or services, dependent on the nature and costs of those goods and/or services.

*Exempt from this process would be utility and travel expenses. However travel expenses must be procured in line with Shepherd University Travel policies, processes and guidelines.*



# What's New in Procurement?



Procurement Services Office  
Ikenberry Hall  
Room 217  
P: 304-876-5216

## Procurement to Pay Process

### Why?

- State of West Virginia Auditor's Office is requiring additional documentation for payment processing and has set requirements that the documentation has to meet.
- Also to assist with fiscal responsibility and monitoring expenses.

# What's New in Procurement?



Procurement Services Office  
Ikenberry Hall  
Room 217  
P: 304-876-5216

## Procurement to Pay Process

### How?

- Requisition Process

# What's New in Procurement?

## Procurement to Pay Process



Procurement Services Office  
Ikenberry Hall  
Room 217  
P: 304-876-5216

### What is a requisition?

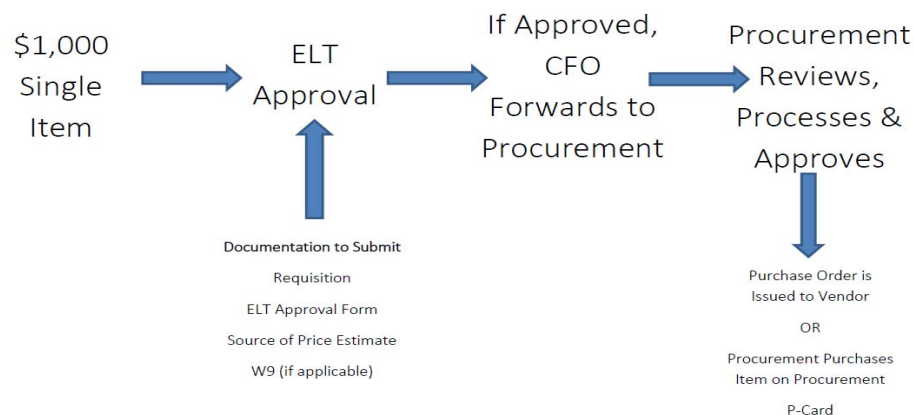
- A requisition is a form to be utilized by departments to request approval to procure certain goods and services. It should be completed **PRIOR** to ordering goods, procuring and/or agreeing to services to be rendered at Shepherd University.
- It is not a request to pay an invoice. An invoice indicates that goods and/or services have already been received and/or rendered.

# What's New in Procurement?

## Three Scenarios that Require a Requisition



Procurement Services Office  
Ikenberry Hall  
Room 217  
P: 304-876-5216





# What's New in Procurement?

## Procurement to Pay Process

### ELT Approval

*Professor Dolittle wants to purchase a new microscope that costs \$1,500.00.*

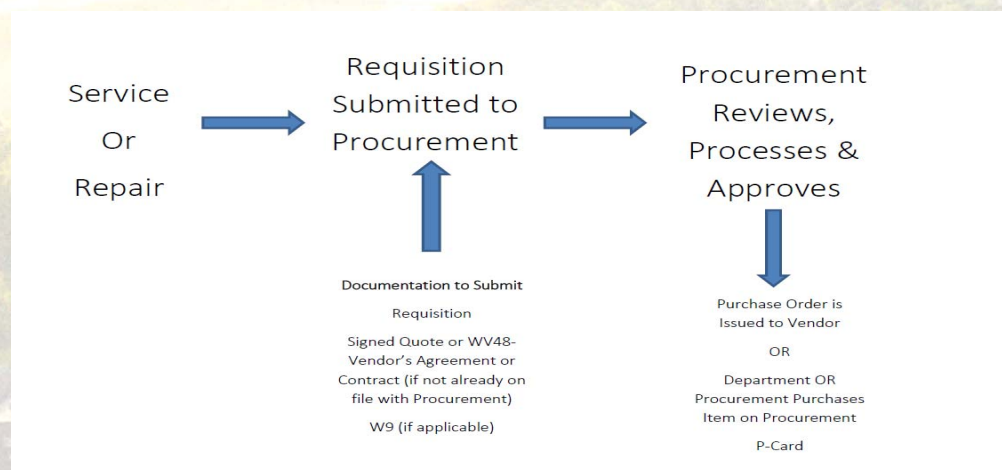
- a) He asks his department's admin to put in on his or her P-Card.
- b) He checks to ensure there are monies available in the Fund, Org and Account for his department's budget. He then completes an ELT Approval form, requisition form, procures a quote of the equipment he needs and forwards to Dean. Then Dean will then forward to Dr. Beard for ELT approval. If approved, CFO will forward to Procurement. Procurement will process the request by either issuing a Purchase Order or by purchasing with a Procurement P-Card.



Procurement Services Office  
Ikenberry Hall  
Room 217  
P: 304-876-5216

# What's New in Procurement?

## Three Scenarios that Require a Requisition



Procurement Services Office  
Ikenberry Hall  
Room 217  
P: 304-876-5216

# What's New in Procurement?



Procurement Services Office  
Ikenberry Hall  
Room 217  
P: 304-876-5216

## Procurement to Pay Process Services/Repairs

*A department wishes to have guest speaker present to a group of students and the speaker requires a fee for his or her services.*

- a) On the day of the conference, the speaker comes and completes the necessary paperwork. The department then forwards to Procurement for payment.
- b) Department completes a requisition and submits to Procurement along with a signed WV-48 Vendor's Agreement Form, after ensuring budget monies are available in the Fund, Org and Account in which the service is to be expensed.

# What's New in Procurement?



Procurement Services Office  
Ikenberry Hall  
Room 217  
P: 304-876-5216

## Procurement to Pay Process Services/Repairs

*A department needs to have equipment in the lab repaired by an outside vendor.*

- a) The department calls the vendor and makes an appointment to have the equipment serviced. The vendor completes the repair and bills Shepherd University. The department forwards the invoice and receiving report to Procurement Services for payment.
- b) Department completes a requisition and submits to Procurement along with a signed WV-48 Vendor's Agreement Form, after ensuring budget monies are available in the Fund, Org and Account in which the service is to be expensed.

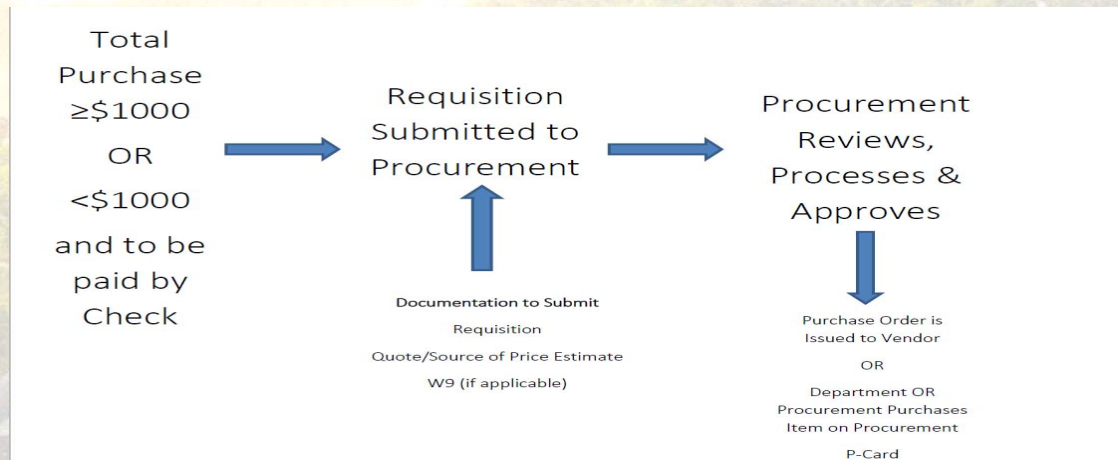


# What's New in Procurement?

## Three Scenarios that Require a Requisition



Procurement Services Office  
Ikenberry Hall  
Room 217  
P: 304-876-5216



# What's New in Procurement?

## Procurement to Pay Process

Total Purchase \$1000 or More OR a Check Issued by State



Procurement Services Office  
Ikenberry Hall  
Room 217  
P: 304-876-5216

*A department needs to purchase several lab supplies to be purchased from Amazon. The complete order will total \$1,001.*

- The administrative assistant purchases the supplies on his or her P-Card.
- Department completes a requisition along with a copy of a shopping cart after ensuring budget monies were available. Procurement processes and approves the requisition and forwards back to the department informing them that the purchase may now be purchased on the department's P-Card.

# What's New in Procurement?



Procurement Services Office  
Ikenberry Hall  
Room 217  
P: 304-876-5216

## Procurement to Pay Process

Total Purchase \$1000 or More OR A Check Issued by State

*A department needs to order supplies totaling \$300.00 and the vendor does not accept a credit card and a check will need to be issued.*

- a) The department places the order with the vendor. The vendor delivers the supplies and an invoice. The department submits the signed invoice and receiving report to Procurement.
- b) Department completes a requisition along with a copy of a quote after ensuring budget monies were available. Procurement processes and approves the requisition and issues a purchase order to the vendor.

# What's New in Procurement?



Procurement Services Office  
Ikenberry Hall  
Room 217  
P: 304-876-5216

## Procurement to Pay Process



### Test Your Knowledge

Do I require a requisition if...

- I would like to buy \$50 of office supplies on my P-Card?
- I would like to pay an honorarium to a guest speaker for a campus event?
- I would like to print flyers for an event on campus and pay with my P-Card?
- I would like to use a monthly computer service such as SurveyMonkey?
- I would like to pay \$500 for a conference registration?
- I have equipment to purchase that totals \$450.00 and the vendor needs to be issued a check for payment?
- I would like to host an event on campus and have catering provide a meal. The total costs would be \$300.00.



# What's New in Procurement?

Procurement to Pay Process

## The Purchase Requisition Form



Procurement Services Office  
Ikenberry Hall  
Room 217  
P: 304-876-5216

# What's New in Procurement?

Procurement to Pay Process

## The Purchase Requisition Form



Procurement Services Office  
Ikenberry Hall  
Room 217  
P: 304-876-5216

- Type of Purchase
- Signatures Required
- Funding Information

<b>Shepherd UNIVERSITY</b>		<b>REQUISITION</b>		DATE	FISCAL YR	
SUGGESTED VENDOR		VENDOR ID NUMBER		TYPE OF PURCHASE		
				<input type="checkbox"/> STANDARD <input type="checkbox"/> P-CARD <input type="checkbox"/> GRANT FUNDS <input type="checkbox"/> AGREEMENT <input type="checkbox"/> Y <input type="checkbox"/> N <input type="checkbox"/> CONTRACT    #		
PHONE:		FAX:		DEPARTMENT NAME		
MAJOR ADMINISTRATOR		DATE		DEPARTMENT CONTACT		
BUDGET OFFICER				EXTENSION		
ORG ADMINISTRATOR		DATE		Ship To:		
BUDGET OFFICER				SOURCE OF PRICE ESTIMATE		
				QUOTE NUMBER		

# What's New in Procurement?

Procurement to Pay Process

## The Purchase Requisition Form

- Blanket Requisition

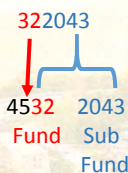
Shepherd  
UNIVERSITY

Procurement Services Office  
Ikenberry Hall  
Room 217  
P: 304-876-5216

# What's New in Procurement?

Banner to Oasis Funding

Banner Fund



4532 | Operations  
4533 | Auxiliary  
4534 | State Grants  
8771 | Federal Grants

Fund/Sub Fund = The Big Pot of Money

Fund Accounting			
Fund :	4532	Object :	
Sub Fund :	2043	Sub Object :	
Department :	0486	Revenue :	
Unit :		Sub Revenue :	
Sub Unit :		BSA :	
Appr Unit :	09900	Sub BSA :	
		OBSA :	
		Sub OBSA :	
		Dept Object :	
		Dept Revenue :	

Shepherd  
UNIVERSITY

Procurement Services Office  
Ikenberry Hall  
Room 217  
P: 304-876-5216



# What's New in Procurement?

## Banner to Oasis Funding



Procurement Services Office  
Ikenberry Hall  
Room 217  
P: 304-876-5216

### Banner Org

206330



Unit  
6330

Fund Accounting		
Fund :	4532	Object :
Sub Fund :	2043	Sub Object :
Department :	0486	Revenue :
Unit :	6330	Sub Revenue :
Sub Unit :		BSA :
Appr Unit :	09900	Sub BSA :
		OBSA :
		Sub OBSA :
		Dept Object :
		Dept Revenue :

Org/Unit = Departmental Check Book

# What's New in Procurement?

## Banner to Oasis Funding



Procurement Services Office  
Ikenberry Hall  
Room 217  
P: 304-876-5216

### Banner Account

7GH116



Sub Object  
H116

Fund Accounting		
Fund :	4532	Object :
Sub Fund :	2043	Sub Object :
Department :	0486	Revenue :
Unit :	6330	Sub Revenue :
Sub Unit :		BSA :
Appr Unit :	09900	Sub BSA :
		OBSA :
		Sub OBSA :
		Dept Object :
		Dept Revenue :

Account/Obj/Sub Obj = Type/Purpose of Expense



# What's New in Procurement?

Procurement Services Office  
Ikenberry Hall  
Room 217  
P: 304-876-5216

## Procurement Website



# What's New in Procurement?

Procurement Services Office  
Ikenberry Hall  
Room 217  
P: 304-876-5216

## Questions?