CU Marketplace New Purchase Requisition Process Webinar Q&A 10/08/2024

The following is a transcript of questions asked and answered in the Q&A function within Zoom during the Requisition Process webinar on 10/08/2024. It has been edited for clarity and some questions have been removed as a result.

Q1: Are we able to add forms to the Marketplace Forms box on the homepage?

A1: Unfortunately, the forms in this box cannot be customized at the user level.

Q2: When does the Amazon catalog launch? Looking forward to it!

A2: The Amazon catalog will launch on December 6th. In November, we will host webinars to provide training on their punchout catalog.

Q3: Spotted the Amazon catalog - when will that be available to all Shoppers?

A3: December 6th

Q4: How is the purchase requisition form different from the non-catalog form? Can we get a grid of form name and form purpose be provided? Or hover over form and see what it's for and what it's not for?

A4: We will have one requisition form that will take the place of all of the existing requisitions forms except Payment Vouchers, which has its own new form.

Q5: Will shopping through catalogs be the same process or has that been updated as well?

A5: The catalog process will remain the same.

Q6: Are there any other catalogs that will launch on December 6th, in addition to Amazon?

A6: At this time, Amazon is the only new catalog we will launch.

Q7: Are all search boxes case-sensitive? Does it have to be the exact supplier name as it exists in the Marketplace? If a supplier operates under multiple names, can the search box allow searching by any business name under that supplier?

A7: Search boxes are not case-sensitive. You can search using the full or partial supplier name.

Q8: Can we skip the purchase requisition form and go straight to the Construction SPO like we used to?

A8: You will see shortly that the construction SPO is part of this requisition form. The information you will be required to provide will be different from purchases for goods and services.

Q9: What does the fulfillment address default to?

A9: The supplier determines their default fulfillment address, so it can vary by supplier.

Q10: Are there any plans to be able to request items ship directly to non-campus addresses?

A10: Unfortunately, you cannot add non-CU addresses to Marketplace orders.

Q11: If our supplier is not in the system, will the "add" button pop up on this screen, or will we have to go to another screen?

A11: You will be able to request a supplier from the form itself.

Q12: Can we select Internal or External for attachments?

A12: The items that you attach here will default as an internal attachment, but you still have the ability to change it to an external attachment from the Requisition itself.

Q13: Should we save progress all the time or just click next? Doesn't the system save automatically for us?

A13: After you complete each page, you will need to select either Save Progress or Next to save what you did on that specific page; it will not automatically save as you type. If you try to leave the page without saving, you will receive a notice that you will lose your changes if you do not save your progress.

Q14: Is the Requisition number assigned after you create the cart? (i.e., the control number)

A14: Yes, the form number shown here is different from the requisition number. The requisition number is assigned when you create the cart.

Q15: What's the difference between the Form Number and Req number? I'm looking at the top left corner.

A15: The requisition number is assigned once you finish the form and create the cart – the form number is a unique number assigned whenever you begin a new Purchase Requisition.

Q16: Are the Percipio Skillsoft trainings going to be updated to show the new interface/workflows?

A16: Yes, we have updated the Skillsoft training as part of this project. We also have multiple knowledge base articles and videos on our website (with more to come as we go live).

Q17: How is this total now going to encumber on the general ledger?

A17: The encumbrance will match what you put in the line item information. If it is a blanket purchase order (which replaces our current SPOs), it will not encumber the grand total. It operates just like SPOs do now.

Q19: If we have a standing PO already established through the end of the year, do we need to update it or do anything once this goes live?

A19: For any SPO's that run through this fiscal year, we do not anticipate you needing to do anything with those purchase orders.

Q20: Do we need to do anything with our current SPOs as part of the transition?

A20: Not at this time, but we are working with the Controller's Offices at each campus to determine how we will manage SPO's that go beyond this fiscal year. We will provide communication on that process by the end of this calendar year.

Q22: So if there aren't variable dollar amounts, instead say it's the same amount monthly over time, it wouldn't be a BPO?

A22: Correct, that can be entered as a regular non-catalog order and paid on a monthly basis. If the payment is $1,000 per month, you can enter a quantity of 12 at $1,000 and pay that monthly.

Q23: What if the current SPO will go beyond the end of FY25?

A23: We are working with the Controller's on how we will manage these SPO's that go beyond FY25. We will communicate how these will be managed by the end of the calendar year.

Q24: Commodity Code Search: can we select "favorites" that will appear at the top of our selection list? This would be helpful.

A24: Unfortunately, not at this time.

Q25: For research laboratory purchases, most of our purchases would fall under 15 - is that subclassified?

A25: Yes, there is a subcategory under 15 for laboratory supplies and equipment.

Q26: Do these commodities crosswalk to account codes by the name of the child codes?

A26: Not at this time, but we are exploring the option to do this in the future.

Q27: How much freedom will I have to correct information in carts that people turn in to me? Like if they got the commodity code wrong or if it really should be a standing PO, etc. Can I correct all that?

A27: As a requestor or approver, you can modify the requisition assigned to you.

Q28: If you don't hit "Save Progress" and just hit Next, will it save your progress?

A28: Yes, Next automatically saves the information on the page.

Q29: Will IT purchases prompt for ICT Review? Or is that campus-specific?

A29: When you identify that you are purchasing software or will share university data, you will be prompted to complete a new page called Security & Compliance. On that page, the first thing you will do is identify which campus you are on and the form will then be customized to your campus process.

Q30: If we need to order more than one item from the same supplier in a non-catalog form, are we going to have to go through all of these questions again, or will it populate automatically?

A30: No, you can quickly add a second line without answering all of the questions again.

Q31: Can we still copy a requisition to a new cart?

A31: Yes you will still be able to copy a requisition to a new cart via the same method you are used to today. Follow up - you won't be able to copy a requisition to a new cart if it is a requisition you made using one of the old/legacy forms. But requisitions created using this new form will be able to be copied to a new cart as normal.

Q32: Have commodity codes been added to reflect the way Advancement-Development does business?

A32: The commodity codes have been added to reflect the broader way the university does business, not specific to any one department.

Q33: If I need to enter a small dollar contract before 10/17, what will happen to it after 10/17? Will it need to be entered again in the updated system if it does not get approved before 10/17?

A33: Nothing is changing with the small dollar contract process, so it will operate the same way after 10/17 and any requests that are inflight will continue as is.

Q34: Is "Add to Cart and Return" different from "Save to Cart and Add Another"?

A34: "Add to Cart and Return" and "Save to Cart and Add Another" are very similar but "Save to Cart and Add Another" has a specific advantage over "Add to Cart and Return". It keeps the form you already filled out "intact" so you don't have to fill out every question/entry again - you would only need to modify anything that needs changing. Alternatively, "Add to Cart and Return" still works - but you would have to fill out all the questions again (it puts the completed form in your cart then brings you back to a "blank" form)

Q35: What if there is not a unit price or quantity but only a dollar amount?

A35: If it is the type of purchase we think of today as a non-catalog order, you will put a quantity of 1 and then put the dollar amount in the unit price field. If it is a blanket PO, the quantity will default to 1, and you will just enter the full dollar amount.

Q36: Is there a limit on the number of items that can be added to the Purchase Order Items?

A36: No, there is no limit except for blanket purchase orders, which only allows one.

Q37: Are we able to "cart" our work? (Work on multiple orders at one time?)

A37: You can save a partial form and go back to it later. If that doesn't answer your question, let us know and we can ask in the live Q&A.

Q38: Are there any requirements for the product description? I just ask because it can be difficult when a lab purchases equipment or chemicals and the general population isn't familiar with the item.

A38: The information should make sense to the supplier, since they are the one receiving the purchase order and need to fulfill the order (that is the same as it is today).

Q39: What happens if we have a cart with multiple suppliers?

A39: Just as it is today, if you combine carts with multiple suppliers, it will combine all into a single requisition. When the requisition is approved, it will create separate purchase orders with separate purchase order numbers.

Q40: How do we take into account shipping costs in a quote if the quote has multiple items to be ordered?

A40: As you do now, if you know the amount, you can add it to the requisition as a separate line. If you do not know shipping, that is ok, AP can add it at the time of invoice.

Q41: Why do you have to add the commodity code twice, in the purchase information and the purchase order items?

A41: The first commodity code you select while completing the form is in place to trigger (where needed) additional "Commodity Specific Questions" - so we are able to collect all required information on the first go-around (some commodity selections require additional information). The commodity code on the Purchase Order Items page is the one that lands on the PO itself and is used by Purchasing for dividing up approvals, etc. but the two should be set to the same commodity code on any given purchase order line.

Q42: Can you edit from the shopping cart if you want to remove a line item?

A42: Yes, prior to submission if you need to make changes, you can open the line item and make edits to the form

Q43: Will we be able to purchase gift cards from the Amazon catalog (for subject payment)?

A43: All gift card purchases will follow our current gift card policy.

Q44: What about the first $25k and >$25k for BPOs?

A44: The system has the ability to allow for this if it is a subaward purchase, so the functionality remains the same.

Q45: Will we still have the ability to change the "Prepared For"?

A45: Yes, this does not change from what you are currently able to do now on Purchase Requisitions.

Q46: If the numbers for the commodity codes are not similar at all to account codes (e.g., 8.01, 8.02), how do we know which account code to add once you have submitted your order to the cart?

A46: This is similar to how the system operates today. We know it is not ideal, which is why we have engaged with the campus Controllers to look at a future project to populate the account code based on the selected commodity code. It is something we will be exploring in 2025.

Q47: I use Construction SPOs almost exclusively. The PO should not be sent to the supplier but rather to me. I am used to making that change when I enter the PO req. Maybe I missed it, will I still be able to do that?

A47: Unfortunately, you are not able to make that change on the front end because this particular form does not allow you to make that change and we hope to address this in a future version.

Q48: For converting commodities from another currency, how do you suggest we attach the documentation?

A48: You can add it either on the attachment page in the requisition form or in the Attachments section on the requisition.

Q49: Please provide an example of the kind of upload required for trademark approval.

A49: It would be a sample of how the logo is being used. So if you are purchasing a notebook with the CU logo on it, you would upload the drawing provided by the supplier.

Q50: Regarding "punchout" quotes. Will I still get the punchout and accept or submit it (can't remember the language) and it will then automatically generate the PO?

A50: The punchout catalog process will remain the same as it does today.

Q51: Does a high dollar amount Purchase Requisition tell us when we've reached the RFQ, RFP level of processing?

A51: It does not directly tell you when you have reached that level, but if you select the option that your order is over $50,000, it will display a new page for the Source Selection and Price Reasonableness (SSPR) form, and it does state at the top that the process is used for orders between $50,000 and $150,000.

Q52: I never really remember the process 100%.

A52: You'll still be able to create 2 PO lines for Subcontract BPOs. We'll get some How-to's on those.

Q53: Will that closure of old purchase orders apply to ones already in the system?

A53: It will apply to any existing POs that are currently open. We will not auto-close anything that is a BPO or any SPOs that are still out there that are active and open.

Q54: Is the threshold of $10K remaining the same for ATF purchase orders and for required receiving?

A54: Yes that is accurate on both counts. The ATF threshold is still $10k, and any PO over $10k that is not a BPO (new name for SPO) will require receiving to release payment on invoices.

Q55: To clarify, we won't need to email POs to AP anymore; it will be done automatically.

A55: Invoices should be submitted to APinvoice@cu.edu and a PO# is still required to be indicated on the invoice document in order for AP to be able to process.

Q56: Can we request a BPO be held open if we anticipate an amendment to the SOW in the near future? For example, to increase the BPO amount?

A56: BPOs will not be auto-closed so you don't need to do anything special to keep it open.

Q57: To clarify, we won't need to email POs to AP anymore; everything will be handled automatically in Marketplace? Thanks.

A57: Copies of the PO do not need to be sent to AP, only the invoice should be submitted to APInvoice@cu.edu with the PO# indicated on the invoice document.

Q58: What happens if the item actually comes in as slightly higher? Will we need to contact change orders, or will it also be flagged for auto close?

A58: There is a small tolerance for POs if the invoices come in slightly higher, depending on the type of PO and the amount, etc. If it's a match exception, the invoice approver would be notified through the workflow, then you can email change order to make the adjustment.

Q59: So for the commodity code/account, we should just add the account codes that we normally use or that are as close to the commodity code description?

A59: Yes, you will operate the same way you do today.

Q60: How do we open POs again? I can see POs closing while we are waiting for an adjustment for a subcontract.

A60: You can email change order to request the PO be reopened.

Q61: What if we want a PO to stay open?

A61: You will email changeorder@cu.edu.

Q62: Is the auto-close process just for POs going forward after 10/17 or any previous POs submitted prior to the redesign?

A62: Any non-catalog that has not yet been closed.

Q63: Maybe I missed this, but if the invoice is larger than the PO, how does that factor into the new change order process?

A63: There is a small tolerance, but if the voucher is in match exception you will still contact changeorder@cu.edu like you do today, or work with supplier for a credit memo if you disagree with the charges.

Q64: Should we request to close any POs that should currently be closed before the 17th?

A64: The change does not impact our ability to close PO's so those requests do not have to be done prior to the 17th.

Q65: What if we do not know the "quantity"? For example, when we hire consultants to provide services, sometimes we do not know how many times they will invoice, so we might set it up as quantity 1 x $5000. However, if they decide to invoice 2 x $2500, would their PO auto-close after the first invoice is paid?

A65: This would be a blanket purchase order. The PO will be based on the total dollar amount and you can pay against it at varying rates.

Q66: More of a comment - We can select 'green/recycled' products in catalog searches, but it would be great to also highlight suppliers that have commitments to sustainability.

A66: This is a great suggestion and something we will take back and look into.

Q67: Can you clarify - we are supposed to preemptively email change orders to keep an SPO from auto-closing when it is fully billed?

A67: PO auto-close will not impact SPO's or BPOs.

Q68: Are there any changes in the Redesigned Marketplace for purchasing from a catalog vendor using a quote? We order many items from Dell using quotes generated by our "shopper".

A68: That process will not change.

Q69: Where did the ST info come from? I must have missed it, but have to add for the requestors I handle.

A69: Proving a guide below on how to add a SpeedType as a default value in your profile. If your Requestors have a default SpeedType set up, it will show automatically https://pschelp.cu.edu/s/article/CU-Marketplace-How-to-Set-a-SpeedType-as-Default-in-Your-Profile please let me know if this doesn't address the question in full!

Q70: Is there a way to search for a supplier using EIN?

A70: No, this is a permission we have looked into but if we turn on that permission, it allows people to search and see social security numbers so this is not something we can do at this time.

Q71: For sole source, will that just be an internal attachment?

A71: If you choose to upload the Sole Source Form instead of filling it out online, you will attach it when prompted in the requisition, and it will be sent to the PSC as an internal attachment.

Q72: I work with grant accounts and most of the shoppers have multiple STs. Do they have to pick a default?

A72: No, this is intended to be used as a convenience measure for people who like to use "favorites" who frequently used ST auto populate on their orders to save data entry time.