

PURCHASING SERVICES

2024 Spring Training

April 24, 2024



Purchasing Services

- End of FY24 Guidance
- Purchasing Methods/Thresholds
- Planning Timeline
- Order Competition Status
- Dashboard Review
- Updated Purchasing Policy

End of FY24 Guidance

AREA

Requestor
Purchasing
Budgeting

DATE

Monday, June 3

BUSINESS UNIT ACTION

- All requisitions greater than \$100,000 should be submitted and approved; exceptions apply – contact Chief Procurement Administrator.
- Requestors start reviewing Open POs for closure – contact your Budget Analyst or Buyer with specific questions.

End of FY24 Guidance

AREA

Requestor
Purchasing
Invoices

DATE

Monday, June 10

BUSINESS UNIT ACTION

- FY24 Change Requests should be submitted to allow time for approval and processing.

End of FY24 Guidance

<u>AREA</u>	<u>DATE</u>	<u>BUSINESS UNIT ACTION</u>
Requestor Purchasing	Monday, June 17	<ul style="list-style-type: none">•Review open Purchase Orders with no receiving or partial receiving to ensure delivery before June 30. Have suppliers submit all invoices directly to acctspay@liberty.edu•Goods not received by June 30 will be expensed out of FY25 department budget. Service invoices will be accrued to FY24 based on service date. <p>Note: 10 business days remain until end of the FY.</p>

End of FY24 Guidance

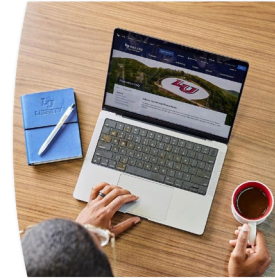
<u>AREA</u>	<u>DATE</u>	<u>BUSINESS UNIT ACTION</u>
Requestor Interdepartmental Purchasing Accounts Payable	Monday, June 24	<ul style="list-style-type: none">•Check Daily – Receive goods and services in BuyLU to facilitate payment and expensing in FY24.•Follow up on any outstanding items above. Complete approvals of requisitions for Internal Purchase Orders (IPOs) in accordance with internal servicing department guidelines.•Internal charge backs should be completed prior to June 30. <p>Note: Internal Servicing Department should only invoice if work is completed within FY24.</p>

Purchasing Methods



P-Card

- Under \$2,500
- Within P-Card policy
- No contracted services



Non-Catalog

- Quote/Contract for goods & Services
- Active supplier in buyLU



Catalog

- Contracted pricing
- Streamlines ordering process
- Available on buyLU Shopping Dashboard



Sole Source

- Purchase requiring multiple bids
- Competition is not available

Thresholds

Threshold	Process
\$0 - \$1,000	<ul style="list-style-type: none">• P-Card Purchases for LU Branded items are limited to \$1,000.• LU Branded purchases over \$1,000 require multiple bids.• All LU Branded items must be purchased from licensed suppliers.
\$0 - \$2,500	<ul style="list-style-type: none">• P-Card purchases must be less than \$2,500.
Above \$10,000	<ul style="list-style-type: none">• All purchases above \$10,000 require solicitation of a minimum of 3 bids.• If more than one bid is not possible, a Sole Source Justification Form is required.
Any Amount	<ul style="list-style-type: none">• All university purchases requiring contracts must go through the Procurement department for signature.• Employees do not have the authority to sign purchasing agreements on behalf of the university.

Procurement Planning Timeline

Supplier

Typical processing time: 1-3 business days

Supplier Request Submitted

Supplier Registration

Review/Approvals

Supplier Activated

Contracts

Typical processing time: 30+ business days

Contract Request Submitted

Contract Terms Reviewed & Negotiated

Contract Approvals & Signature

Contract Executed

Purchasing

Typical processing time: 1-3 business days

Requisition Submitted

Approvals

Requisition Processed

Purchase Order Distributed

Invoicing

Typical processing time: 1-3 business days

Invoice Created

Approvals

PO, Receipt, and Invoice Matched

Payment Distributed

Timeline does not include financial approvals.
Urgent requisitions - please notify approvers.

Order Competition Status

Edit Purchase Details



NSF Approval
Justification

Order Competition Status

Competed or Sole
Source Status



1 - Purchase 10K or less (branded items<1K) ▼

Reason for Exemption

Other Exemption

Organization Values

- 1 - Purchase 10K or less (branded items<1K)
- 2 - Competed - Solicitation of 3 bids is required
- 3 - Justified - Sole Source according to attached SSJF
- 4 - Exempt - Provide reason below

Associated Documents

Associated PO


★ Required fields

Save

Close

Open PO's Shopping Dashboard

Shopping



Comment requests for closure on purchase order.

Close throughout year to get back unused funding.



Dashboards • Shopping



- Accounts Payable
- Accounts Payable Dashboard
- Approvals
- Contracts
- Contracts Dashboard
- Main Dashboard
- Shopping
- Sourcing Events Dashboard

My Open Purchase Orders



Total Purchase Orders: 90

Approx. Total Amount: 77,353.56 USD

PO Number ▾	Supplier	Created Date/Time ▾	Matching Status	Total Amount ▾
P0271065	Grainger Inc ⓘ	11/7/2023 1:56:55 PM	Fully Matched	4.09 USD
P0271059	Blue Ridge Sportswear ⓘ	11/7/2023 1:48:54 PM	No Matches	0.01 USD
P0269842	Fastenal ⓘ	9/26/2023 2:56:19 PM	Fully Matched	131.56 USD
3841344	Dell Computer Corp ⓘ	7/28/2023 8:00:23 PM	No Matches	50.00 USD
P0261720	LU Encumbrance ⓘ	7/11/2023 1:42:39 PM	No Matches	0.01 USD

Unmatched Invoices Approvals Dashboard

Approvals



Review status and address any issues such as need for receiving, change request, etc.



All ▾

Search (Alt+Q)



2,151.01 USD



421



3



Dashboards • Approvals



Accounts Payable

Accounts Payable Dashboard

Approvals

Contracts

Contracts Dashboard

Main Dashboard

Shopping

Sourcing Events Dashboard



Unmatched Invoices (These invoices will not be paid until the issue is resolved)



Total Invoices: 387

Approx. Total Amount: 1,721,291.32 USD

Invoice Number ▾	Supplier	Due Date ▾	Discount Date ▾	Total Amount ▾
QT006350	Dell Computer Corp ⓘ	4/8/2024		5.00 USD
QT006171	LU Cabinet Shop ⓘ	10/30/2023		1.00 USD
QT006157	Dell Computer Corp ⓘ	9/23/2023		85.00 USD
QT006154	Electrical Equipment Company/EECO ⓘ	9/16/2023		106.42 USD
QT006153	Electrical Equipment Company/EECO ⓘ	9/16/2023		106.42 USD



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Select "Matching" to identify reason invoice is unmatched.

Buy

LU

All

Search (Alt+Q)

0.00 USD

423

7

Invoice • LU Cabinet Shop • QT006171

Assign

1 of 1 Results

<

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Summary

Matching

Supplier Messages

Comments

Attachments

History

Please see the highlighted items below for any matching exceptions.

P0268672

Match Status	Matching Method	Invoice Line No.	PO Line No.	Catalog No.	Description	Size/Packaging	Unit Price	Quantity	Ext. Price
Unmatched	2 Way PO/Invoices	1	1		Cabinet	EA	1.00 USD	1	1.00 USD

MATCHING EXCEPTIONS

- No receipt has been entered

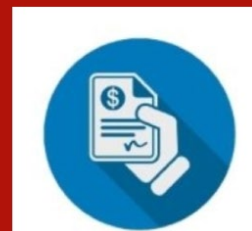
MATCHING SUMMARY

	Ordered	Received	Net Invoiced	Exception Reason
Quantity	1	--	1	
Unit Price	1.00 USD	--	1.00 USD	
Ext. Price	1.00 USD	--	1.00 USD	
Document DTS&H	0.00 USD	--	0.00 USD	

INVOICES 0 / CREDITS 0 / RECEIPTS 0

Invoices Requiring Receipts Uninvoiced/Partially Invoiced PO's Payments Dashboard

Payments



Create receipts if
products/services have been
received/completed.

Obtain invoices from vendor.



BuyLU

All ▾

Search (Alt+Q) 🔍

0.00 USD 🛒

♥️ 423

🔔 7

Dashboards • Payments

Accounts Payable Dashboard

Approvals

Contracts

Contracts Dashboard

Main Dashboard

Payments

Shopping

Sourcing Events Dashboard

Supplier Management Dashboard

Supplier Manager

Invoices Requiring Receipts (These invoices will not be paid until the receiving is completed)

Total Invoices: 270

Approx. Total Amount: 1,673,730.56 USD

Invoice Number ▾	Supplier	Due Date ▾	Discount Date ▾	Total Amount ▾
QT006350	Dell Computer Corp ⓘ	4/8/2024		5.00 USD
QT006171	LU Cabinet Shop ⓘ	10/30/2023		1.00 USD
QT006157	Dell Computer Corp ⓘ	9/23/2023		85.00 USD
QT006154	Electrical Equipment Company/EECO ⓘ	9/16/2023		106.42 USD
QT006153	Electrical Equipment Company/EECO ⓘ	9/16/2023		106.42 USD

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In Process Invoices (Pending Workflow)

Total Invoices: 3358

Approx. Total Amount: 5,643,654.30 USD

Invoice Number ▾	Supplier	Accounting Date ▾	Total Amount ▾
QT006352	Dell Computer Corp ⓘ	3/4/2024	5.00 USD
QT006351	Dell Computer Corp ⓘ	2/28/2024	10.00 USD
QT006350	Dell Computer Corp ⓘ	2/23/2024	5.00 USD
QT006339	Google, Inc ⓘ	2/22/2024	0.50 USD
QT006338	CVCJA Central Virginia Criminal Justice Academy ⓘ	2/22/2024	0.52 USD

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Uninvoiced/Partially Invoiced Purchase Orders

Total Purchase Orders: 1865

Approx. Total Amount: 247,896,935.31 USD

PO Number ▾	Supplier	Accounting Date ▾	Total Amount ▾
PO11111	Lowe's ⓘ	8/15/2016	1,111.00 USD
PO11111	Lowe's ⓘ	8/15/2016	1,200.00 USD
PI000025	LU Warehouse ⓘ	9/16/2016	625.00 USD
PI000024	LU Warehouse ⓘ	9/16/2016	1,118.29 USD
PI000023	LU Warehouse ⓘ	9/15/2016	1,118.29 USD

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Coming soon...

Updated Purchasing Policy

Solicitations

Solicit a minimum of 3 bids for purchases over 10k
(LU branded over 1k)

Bid Matrix

All purchases over 10k require a Bid Matrix, located in the Procurement Document Library

Notification

Procurement must be notified by email and included in the acquisition strategy of purchases above 100k

Competition Bid Matrix Form

Standardizes documentation of
competition results

Calculates and highlights cost
savings or additional cost

Justification if higher bid is
selected

LIBERTY UNIVERSITY

Competition Bid Matrix

Pursuant to the Liberty University Purchasing Policy, the University requires all requisitions that exceed \$10,000 to be solicited with three or more vendors. The Competition Bid Matrix is required to be attached with the Requisition and Contract Request when a purchase exceeds \$10,000, unless an exemption or Sole Source Justification applies.

Your name and title: Tammy Gilbert Department: Procurement Date: 4/26/24

Selected Supplier:

Name of Company/Consultant: Vendor Name

Product or Service Description: Description

Manufacturer & model number: (if applicable)

Competition Bid Matrix				
Name of Bidder 1	Vendor Name			
Name of Bidder 2	Vendor Name			
Name of Bidder 3	Vendor Name			
Name of Bidder 4				
Selected Bid Price	\$ 100.00			
Estimated Savings from Competition (Avg - Selected Bid Price)	\$ 100.00			
Description of Requirement	Vendor Name Cost	Vendor Name Cost	Vendor Name Cost	Bidder 4 Cost
Goods	\$ 100.00	\$ 200.00	\$ 300.00	
Total Bid Price	\$ 100.00	\$ 200.00	\$ 300.00	\$ 0.00
Average Price	\$ 200.00			

If the lowest bid was not chosen, provide justification as to why you chose another bid:

By submitting this form, you certify that the information above is accurate and complete and that I have disclosed all potential conflicts of interest (if any) concerning this purchasing matter in accordance with the University's applicable conflicts of interest policies.

Revision Date: 3/7/2024

FY24 Stats

- 23,626 purchase orders -18% increase
- 1,362 non-PO check requests – 4% increase

Violation of Board of Trustees Signature Policy by authorizing use of University funds without a purchase order

- 387 urgent requisitions (higher than FY23)
- 10% cost savings in FY24 beginning 9/11

Average cost savings 8 – 17%

Contact Us

Purchasing Services

- procurement@liberty.edu
- (434) 592-3012

Enterprise Sourcing

- enterprisesourcing@liberty.edu
- (434) 592-5058

Contract Services

- contracts@liberty.edu
- (434) 582-7839

Payment Services

- acctspay@liberty.edu
- (434) 592-3166

P-Card Services

- pcard@liberty.edu
- (434) 582-2266

Travel Services

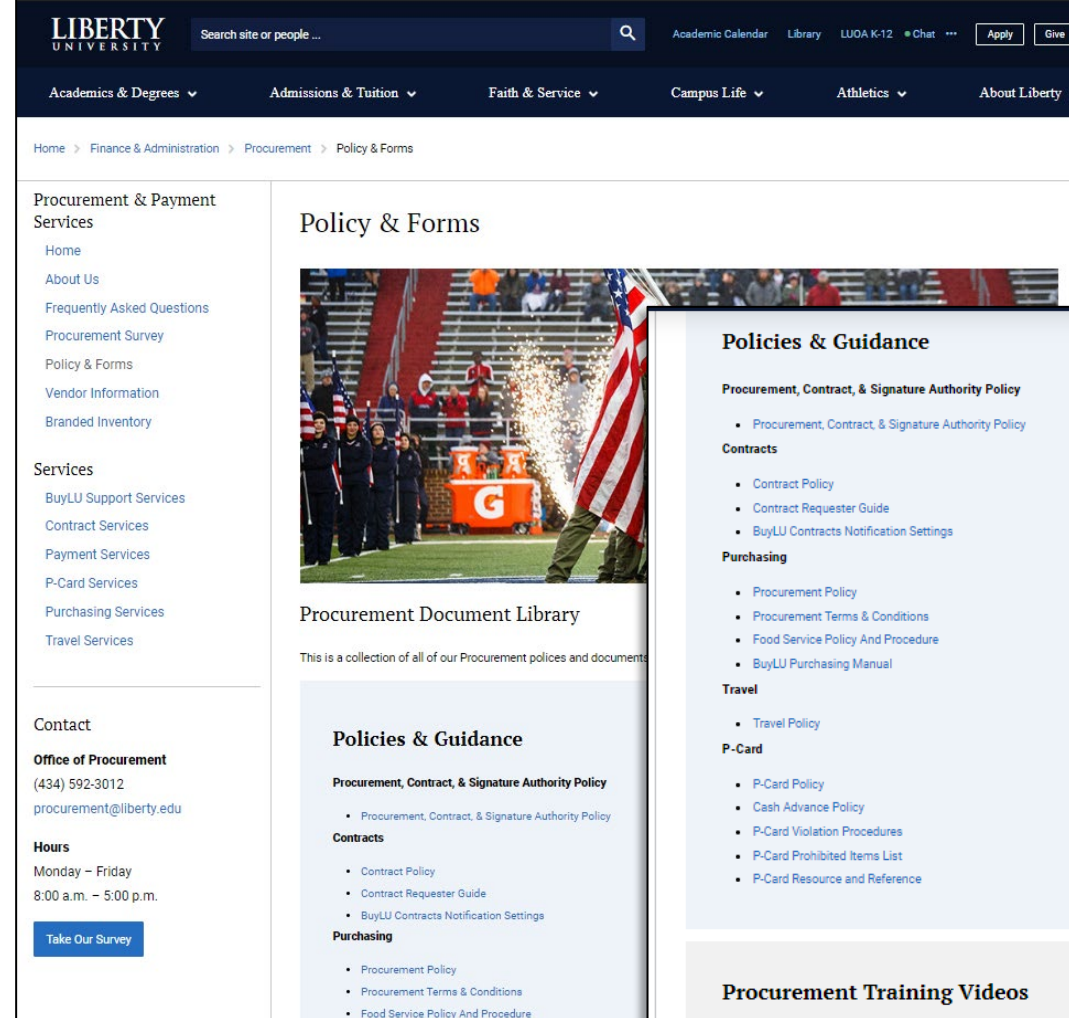
- travel@liberty.edu
- (434) 582-8760

Thank You
Q&A



Procurement Training & Resources

- **Procurement Website**
 - Training Videos
 - Document Library
- **Procurement Training Month – April 2024**
 - Training schedule to be posted on [Procurement website](#)
 - Newsletter announcement



LIBERTY UNIVERSITY Search site or people ... Academic Calendar Library LUOA K-12 Chat Apply Give

Academics & Degrees Admissions & Tuition Faith & Service Campus Life Athletics About Liberty

Home > Finance & Administration > Procurement > Policy & Forms

Procurement & Payment Services
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Policy & Forms
Vendor Information
Branded Inventory

Services
BuyLU Support Services
Contract Services
Payment Services
P-Card Services
Purchasing Services
Travel Services

Contact
Office of Procurement
(434) 592-3012
procurement@liberty.edu
Hours
Monday – Friday
8:00 a.m. – 5:00 p.m.
[Take Our Survey](#)

Policy & Forms

Procurement Document Library
This is a collection of all of our Procurement policies and documents.

Policies & Guidance
Procurement, Contract, & Signature Authority Policy

- Procurement, Contract, & Signature Authority Policy

Contracts

- Contract Policy
- Contract Requester Guide
- BuyLU Contracts Notification Settings

Purchasing

- Procurement Policy
- Procurement Terms & Conditions
- Food Service Policy And Procedure
- BuyLU Purchasing Manual

Travel

- Travel Policy

P-Card

- P-Card Policy
- Cash Advance Policy
- P-Card Violation Procedures
- P-Card Prohibited Items List
- P-Card Resource and Reference

Forms & Templates
Contracts

- General ICA – Independent Contractor Agreement
- LUCOM ICA – Independent Contractor Agreement
- Master Purchasing Agreement
- Statement of Work
- Short Form Service Agreement For Guest Speakers & Performers

Purchasing

- ePayables Form
- Fund/Org permissions Request Form

P-Card

- Missing Receipt Form
- Tax Exemption Forms:
 - Home Depot Tax Exemption Form
 - VA Tax Exemption Form

Procurement Checklist & Timeline

- Procurement Process Checklist
- Procurement Process Timeline

Procurement Training Videos
General BuyLU Training Videos

- BuyLU Intro & Navigation
- BuyLU Shopping Dashboard
- BuyLU Catalog Requisitions
- BuyLU Commodity Codes
- BuyLU New Supplier Requests
- BuyLU Non-Catalog Item
- BuyLU Receiving
- Change Request for Non-Catalog Items
- Change Request for Catalog Items
- Finding Draft or Assigned Carts in buyLU

Dashboard Navigation Training Videos

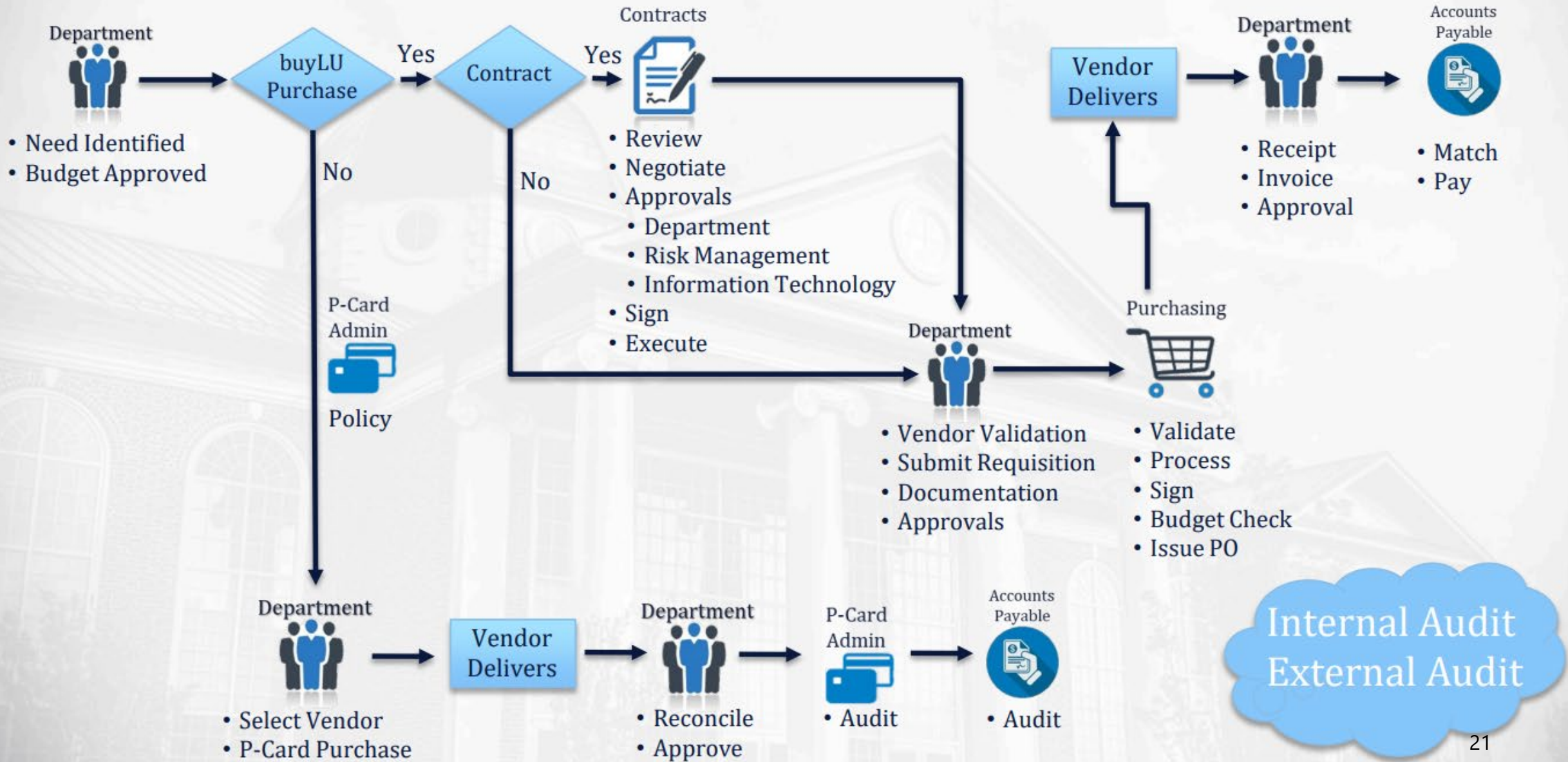
- Approvals Dashboard
- Payment Services Dashboard
- Contracts Dashboard

Procurement Training Sessions Archive
2023
2024

Procurement Newsletter Archive
2023
2024

Procurement Announcement Archive
2023
2024

Procure-to-Pay (P2P) Walk Through



Procurement Planning Checklist

PROCUREMENT PLANNING CHECKLIST

Use this checklist to keep track of all required documentation and forms required for your purchase.

- **Procurement Policy & Forms** are located on the Procurement & Payment Services website:
www.liberty.edu/finance-admin/procurement/policy-forms/
- **Got questions?** Contact Procurement by email or phone:
 - Email: procurement@liberty.edu
 - Phone: (434) 592-3012

SUPPLIER

- ☐ Check to see if supplier is registered in BuyLU:
Suppliers > Search for Supplier
- ☐ If you need a new supplier, request one by
going to BuyLU > Suppliers > Request >
Request New Supplier
- ☐ New supplier request requires current year
W-9 and COI (if required)

CONTRACT

- ☐ Ensure supplier is registered in BuyLU. If not,
submit a supplier request before submitting
contract request
- ☐ Submit contract request in BuyLU
- ☐ Quote
- ☐ Agreement (contract, terms & conditions, etc.)
 - ☐ If ICA, need ICA and ICA Questionnaire
- ☐ COI (if required)
- ☐ Supporting Documentation (as needed)
- ☐ Receive request from Contract Administrator to
submit requisition

CREATE A REQUISITION

- ☐ Determine whether purchase can be made via
a BuyLU catalog. If not offered via catalog,
submit non-catalog requisition
- ☐ Confirm supplier is active in BuyLU. If not,
Request New Supplier
- ☐ If a contract is involved, submit new contract
request in BuyLU. Wait for request from
Contract Administrator to submit requisition
- ☐ Submit non-catalog requisition
- ☐ Attach corresponding documentation (Quote
from vendor, contract, statement of work,
proposal, etc.)
- ☐ For requisitions valued at over \$10,000,
multiple formal bids are required. For
promotional products, multiple formal bids
are required, and the threshold is reduced to
\$1,000

RECEIVING

- ☐ Once item arrives, create receipt on PO in BuyLU

PAYMENT

- ☐ Instruct vendor to email invoices to Payment
Services at acctspay@liberty.edu