

Q&A- FY21 Order Entry Webinar

The answers in this document are current as of June 8, 2020.

- 1. When searching for purchase orders by your username, what is the difference between italicized and non-italicized?**

Italicized usernames are inactive and will not return results. Usernames presented in regular font represent active profiles which do return results.
- 2. What do we do if we are not renewing the PO?**

If you are confident no future invoices or credit memos need to book to the PO, close the PO. Do so by selecting "Close PO" from the Document Actions menu on the PO. Review the FY20 Payments & Encumbrances webinar for additional information.
- 3. Why does the cart name not export to the General Ledger?**

Requisitions do not export information to the General Ledger. Instead, the purchase order generated by that requisition creates encumbrances on the funding account(s). As with KFS, these encumbrances are associated with the supplier to whom the funds are promised, not the description of the order.
- 4. What does BPO stand for?**

BPO stands for "blanket purchase order."
- 5. When should I use a blanket purchase order versus a recurring order?**

A blanket order is a **type** of recurring order. A blanket order is used to set aside a pool of funds for a period of time. A blanket order is appropriate when the itemization of what's purchased is not important. For instance, I know that I need to purchase paint for projects over the course of a year, but I'm not concerned with what colors or types of paint were purchased.
- 6. Is there a limit on the amount of time over which a PO can extend?**

Technically no since recurring PO dates are manually entered when placing the order. If you have traditionally entered a new recurring PO each fiscal year but want to see if your order can actually be entered for multiple years, contact Purchasing. There are different requirements and considerations depending on the commodity being purchased and the supplier. [Locate a contract manager using the Who Buys What page.](#)
- 7. When can we start setting up POs for FY21?**

Now! Order entry for FY21 began on April 1. Purchasing-assisted orders, such as those that involve a contract, sourcing/bids, or establishing a new supplier, should be submitted as soon as possible to ensure they're available for release on July 1.
- 8. I know we should reference the old PO in the recurring payments section of the requisition, but should we also enter a comment?**

While not required, more information is always better than not enough. Add as many details as you feel necessary to help your document approvers and Purchasing understand what is being requested.
- 9. If I have replaced someone who has moved on to a new position should I search for POs under their username?**

Yes. When an individual leaves the university, or moves to a different department, these details are not logged in BUY.IU. Search using the individual's username in the "Prepared By" field in the advanced PO search to locate orders they established that may need to be re-entered. BUY.IU does not allow PO ownership to be transferred from one user to another.

10. If the PO has a previous agreement will it automatically transfer over? Or does it need to be copied manually and added to a new requisition?

The agreement itself is valid for the dates established within it. In most circumstances, the recurring order should be established to reflect the same beginning and ending dates of the agreement. It may be more appropriate to use a change request document to edit the recurring PO dates instead of establishing a new order. Be sure to contact Purchasing for guidance. The action you need to take varies depending on the commodity being purchased. [Use the Who Buys What? page to locate a contract manager.](#)

11. If a BPO is for two years should an additional accounting line be added for FY21?

No. Accounting information for POs established for multiple years will automatically be updated on July 1 to reflect the new fiscal year.

12. What does “sourcing” mean?

Sourcing is the name for the process Purchasing completes to request quotes from suppliers for a purchasing event. This process is also referred to as bidding or gathering quotes. Generally, single transactions exceeding \$10,000 must be sourced by Purchasing staff. [Review the Request Sourcing or Quotes documentation for a detailed walkthrough.](#)

13. Currently, I establish a recurring order with only one supplier. For the time being, would it be better to do a requisition as I order or go ahead and set up a new recurring order?

If you'll be making frequent purchases, a recurring purchase order is likely your best option. This allows you to establish a pool of funds for the fiscal year. The PO number should be referenced each time the supplier is used. Alternatively, if you only make a couple of purchases over the course of a year, one-time orders may be more appropriate. It really depends on your situation.

14. Can we no longer submit orders after June 17? By what date do I need to have my orders in?

The June 17 cutoff is a soft cutoff for catalog and P-Card purchases. If you have catalog or P-Card purchases which must book to FY20, Purchasing strongly encourages you to make those place those orders by June 17. This helps ensure the catalog order will be invoiced in FY20, and that P-Card charges will be available for reconciliation before the June 30 cutoff. You may still make purchases after June 17. However, know that there is a chance that the charges may fall in FY21 depending on how long it takes the supplier to invoice IU for the goods purchased.

There is no deadline for FY21 order entry. However, the sooner you are able to submit these orders the better to ensure they are ready for release on July 1.

15. Why would my requisition split into two POs?

A requisition generates multiple POs if there are multiple lines on the order, and those lines contain different information in the Distribution Methods section. For example, PO line 1 states the order should be distributed to orders@barnesandnoble.com and PO line 2 states orders should be distributed to customerservice@barnesandnoble.com.

A distribution method is attached to each fulfillment center on the supplier record. The supplier dictates this information when they register. **Unless you have specific instructions from the supplier, this field should not be updated.**

16. What do I do if I realize I made a mistake, but I've already submitted my requisition?

If the requisition has not been approved by the FO Approval workflow stop, you are able to withdraw it. Follow the steps outlined in the [Cancel a Requisition document](#) to learn how. Once cancelled, the order can then be copied, updated, and resubmitted. The [Copy a Requisition document](#) outlines these steps. If the requisition has been approved past the FO Approval workflow stop, it must be returned or rejected by a document approver. Review the PR Approvals workflow to see a list of approvers and use the Comments section to request its cancellation. Learn more about logging comments by reviewing the [Comments in BUY.IU document](#).

17. What if we are waiting on P-Card refunds for FY20, does that get cutoff?

There is no cutoff for P-Card refunds. P-Card expenses should be reconciled within 30 days of posting to the eWallet, regardless of whether a future refund is expected.

18. If a recurring order is not re-established for FY21 prior to June 30, can we still use the copy feature on the requisition after June 30 to set it up for FY21?

Yes, you can use this feature at any time. Review the [Copy a Requisition document](#) to learn more.

19. If you've copied a previous requisition will the Previous PO# field on the new requisition auto-populate with information associated with the copied requisition?

Unfortunately, no. This field is not validated by BUY.IU and must be manually updated when updating the copied requisition.

20. Would there be situations where it would be appropriate to use a change request to update a reoccurring PO rather than create a new PO?

Possibly. This is a question for Purchasing. Locate the appropriate contract manager using the [Who Buys What? page](#).

21. What do we need to think about and do regarding items we are waiting to reconcile due to changes related to COVID-19 travel and P-Card items purchased waiting for refunds?

Review [SOP-TVL-02](#) for guidance related to reconciling travel impacted by COVID-19. The steps you need to take vary depending on how the travel was booked and who paid for the travel.

IU pays P-Card expenses net seven days, and transactions should be reconciled within 30 days of posting to the eWallet. If you are waiting on a refund to reconcile an expense, go ahead and reconcile the expense without the refund. The refund will be applied when it is issued by the vendor.

22. Is "BPO" appropriate to use for subaward requisitions?

No. ORA has established detailed Product Descriptions for use with subawards. Review the [Subaward Entry guide](#) for additional details on entering subawards orders.