PURCHASING PROCESSES

A number of people tend to order goods and services verbally, then wait until the shipments are received and invoiced before preparing the purchase requisitions. We would like to bring to your attention purchasing policy #2.8, which states that purchase orders are to be issued in advance of goods and/or services being provided. When a valid purchase order is not issued at the front end of a transaction, problems can develop such as: shipping errors, lost or misplaced invoices, supplier inquiries for payment, foreign orders held at customs, duplicate payments, etc. In addition, there are no commitments against budgets, resulting in local records being maintained for tracking purposes outside the system. Please issue your purchase order at the front end of the process. On-line Electronic Requisitions facilitate easy and speedy ordering.

LOW VALUE PURCHASE ORDERS BEING PHASED OUT

With Electronic Purchase Requisitions and the Visa Purchasing Card, the use of Low Value Purchase Orders (LVPO) is no longer efficient. As of September 1, 2006 the LVPO will be discontinued.

By using either your Purchasing Card or the Electronic Purchase Requisitions you will have better tracking of your orders, less handling of supplier invoices, and the manual process of handling paperwork is eliminated creating more efficient payment to our suppliers.

For more information on the Visa Purchasing Card call Jennifer Maxwell at x84580 or e-mail at jhmaxwel@uwo.ca. For access to the Electronic Purchase Requisitions call Lilly Ross at x84575 or e-mail at lross@uwo.ca.

PEOPLESOFT FINANCIALS TRAINING

If you are new to the University or just want a refresher course, the Financial Systems group offers weekly training sessions covering all Financials Modules. A brief description of these sessions can be viewed by clicking on the following link: http://www.uwo.ca/finance/people/fintrain/maintenance.html
To request training, use our online form at: http://www.uwo.ca/finance/people/fintrain/trainingrequestnew.html
For more information call Lilly Ross at x85432 or e-mail at lross@uwo.ca.

SIGNING AUTHORITY

If you have experienced staff changes and have not updated your signing authorities, you can do so by obtaining a new signing authority sheet at our web site at http://www.uwo.ca/finance/forms/signauth.pdf.

If you would like to find out who is on your list for signing authority please contact Chris Stevenson at x84585.
STANDING ORDERS

Standing orders may be issued any time a product or service is being provided by the same Vendor repeatedly. Once the Standing order is set up, you simply call the Vendor to release the goods you need, or in the case of a service just let the invoice go directly to Accounts Payable. This process minimizes ordering costs and ensures that suppliers send invoices directly to Accounts Payable, thereby expediting their payment. Standing purchase orders should be used when any of the following situations are anticipated:

- Numerous small value purchases of expendable materials will be made from a particular Vendor throughout a year;
- Numerous requests for services or maintenance repairs will be made from a particular Vendor throughout a year;
- Multiple billings will be received throughout the year under a contract for the rental/lease of equipment.

PHOTOCOPYING/PRINTING/ FAXING

The current contract for the campus-wide fleet of photocopiers ends April 30, 2006. We have issued a Request For Proposal to replace the fleet with the latest network ready digital equipment. This will be a large opportunity and should result in very aggressive pricing and service, since the University of Guelph, Trent University, and Fanshawe College are participating with us. The equipment will have multi-functional capabilities, and users should start thinking about combining their copy, print, and fax functions into one device. If you have printers or fax machines that are near the end of their life, this alternative should be taken into account.

ASSET DISPOSAL

University assets such as computer parts, monitors, scrap wood, or metal can be disposed of through our Physical Plant Department. You can call x88717 to arrange for pickup at your loading dock.

TRAVEL EXPENSES

Users will occasionally purchase goods using their own funds and then claim reimbursement on travel expense reports. Some purchases of supplies while travelling or on field-work are appropriate. However, acquisitions of equipment such as vehicles, computers, fax machines, etc. are outside of the Travel policy and must be purchased using a purchase requisition. This process ensures that users obtain the best value from the best source, as well as obtain PST exemptions where appropriate. It would be much appreciated if this information could be passed along to those in your respective areas. If you would like a local information session on purchasing processes and tools, including on-line capabilities and Visa Purchasing Cards, we would be pleased to do this. Call Bob Moore at x84576 or email finrhm@uwo.ca. For your convenience, information and forms are also available at our website http://www.uwo.ca/finance/purchase/index.html.

E-MARKETPLACE

There is a provincially funded project called OntarioBuys underway that will encompass all education facilities in the Province. It will provide an e-marketplace for people to search for goods, compare pricing from different suppliers, and place orders electronically. It is similar to a combination of our current PeopleSoft electronic requisitions with the Western Office Supplies on-line catalogue and ordering process. The project is expected to be available in the third quarter of 2007.