Introductions & Ice Breaker

"It is not a question of how well each process works; the question is how well they all work together." – Lloyd Dobens

""Individually, we are one drop. Together, we are an ocean." – Ryunosuke Satoro

Table of Contents!

Overview

Today's training will consist of "Common Procurement Functions" performed on a daily basis.
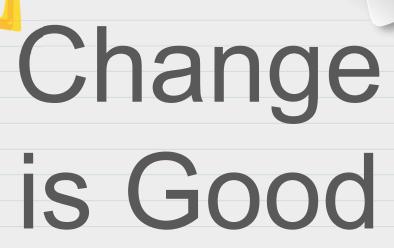
*Note: If you are new and require additional training, please email your Buyer at the end of this training.
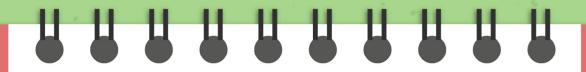
Topic Features

- Procurement Guidelines
- MUNIS
- Vendors
- Requisitions
- Purchase Orders/ Change Orders
- Ratifications
- Sole Sources
- P-Card
- Records Retention

Change is Good

When in doubt, contact the office of Procurement Services BEFORE you proceed…

Procurement Guidelines

What's New or Improved:

- procurement@richlandone.org

- Line item descriptions, Include sales tax

- State Contracts

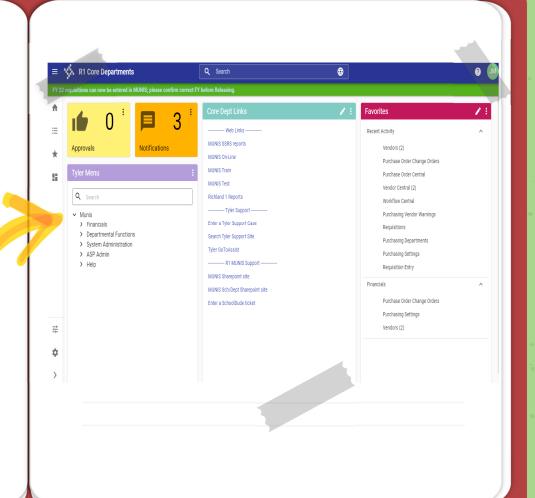- Vendor Applications Vetting

- Ratifications

MUNIS

In this section we will cover the following:

How to look up information and navigate the following information on the MUNIS Hub Home Screen:

❖ Purchase Order Central – Change order information

❖ Vendor Central – Vendor tax ID/ EIN information, business name, etc.

❖ Check the Status of Req.'s

Vendors/ Vendor Application & Information

What will be covered in this section:

❖ Vendor application (utilizing the correct version) & W9/ W8

❖ End User Procurement Guidelines for Processing Vendor Applications

❖ "The vetting process" and why this is important

❖ Processing time

PCards

- ❖ Do's & Don'ts

- ❖ I need my password reset. What do I do?

- ❖ Where can I find PCard policy & procedures

Requisitions/ Purchase Orders/ Change Orders

> Keying requisitions

> How to complete the change order form correctly

Ratifications

- ❖ What is a ratification?

- ❖ Ratification procedures

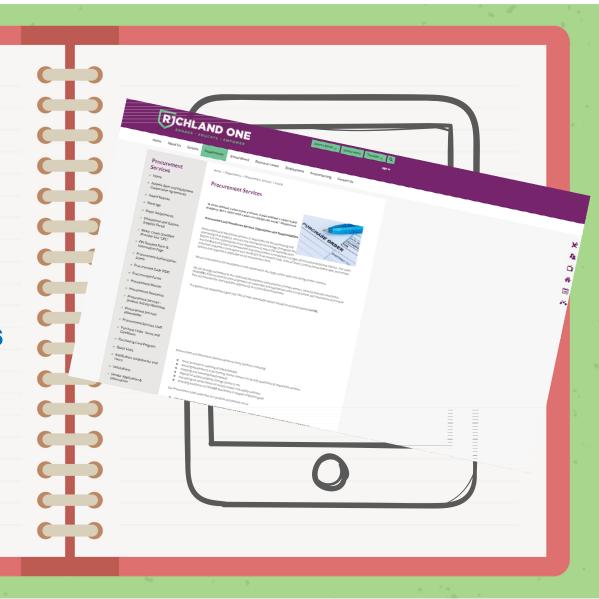- ❖ Where can I locate ratification instructions?

Sole Source

❖ What is a sole source?

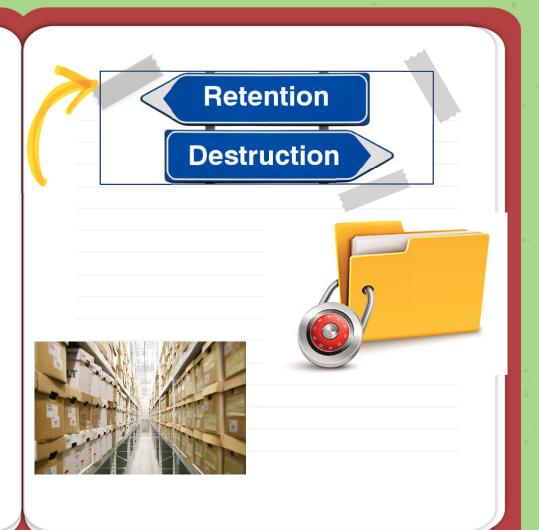❖ Documentation from the vendor does **NOT** justify a sole source

Find Procurement Services Resources on the web!

https://www.richlandone.org/Page/306

Records Retention

- ❖ Logging into IM (Iron Mountain)

- ❖ Records retention policy based on records

- ❖ ….. And much, much more!

Procurement Services Staff

Procurement Staff Member Name	Position	Phone Numbers
LaShonda Outing, CPPB	Director, Procurement & Warehouse Services	231-7040
Jessica McElroy	Administrative Professional	231-7033
(TBA)	Procurement Manager	231-7037
(Vacant)	Construction Contracts Manager	231-7052
Yolanda Cuttino	P-Card Administrator/Procurement Specialist II	231-7039
Charlene Maffett	Procurement Specialist II	231-7029
Stephanie Conrad	Procurement Specialist II	231-7031

Resources

VECTORS:

- Wooden background with checklist and pen
- Open notebook with accessories
- Notebook page vector
- Collection of leaves and colored notes
- Tablet background with hand-drawn learning items

- Retention sign
- File with lock
- Assortment of arrows highlighter
- Pack of small sticky notes in realistic style