

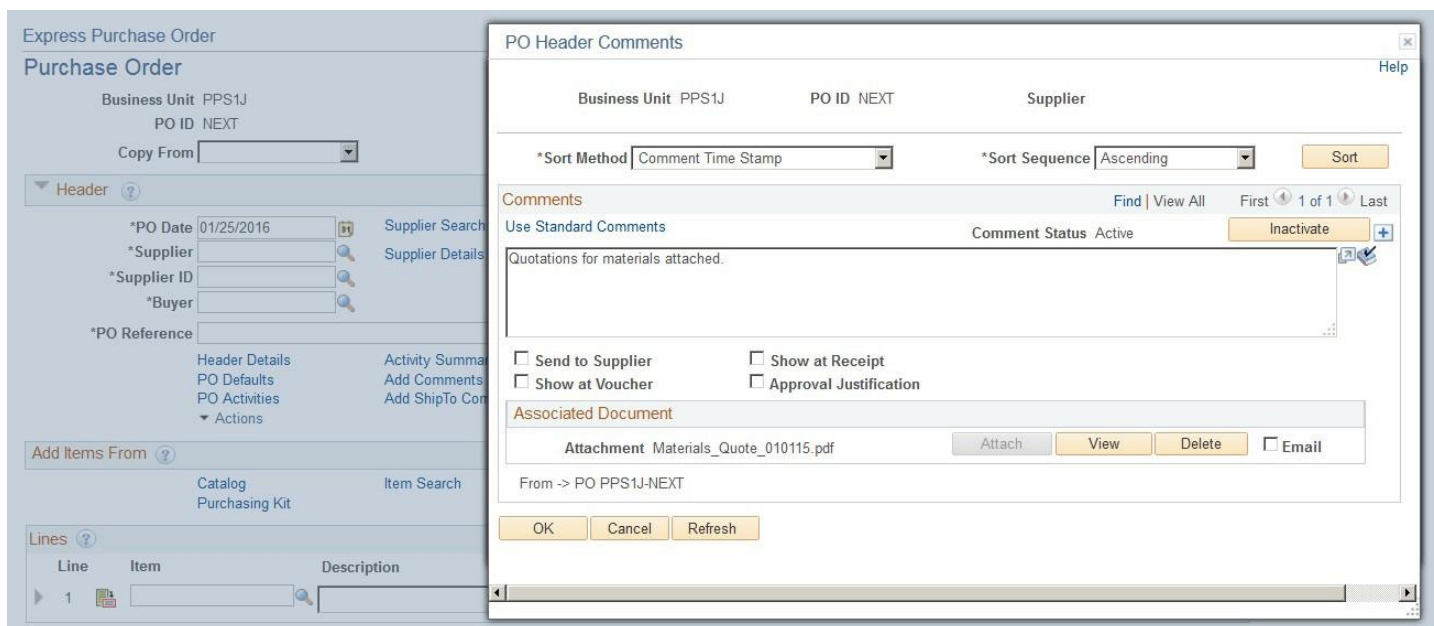


DOCUMENTING COMPETITION IN PEOPLESFT PURCHASE ORDERS

Purchases greater than \$10,000 require a competitive source selection method or exemption per PPS Public Contracting Rule. When issuing a purchase order (“PO”) in PeopleSoft, documenting your source selection method is required. Documenting source selection methods allow records to be retained with the PO.

QUOTATIONS

1. Scan your quote document and the quotes received into a single document.
2. When in the body of the PO, click ‘Add Comments’ to open PO Header Comments.
3. Click ‘Attach’ and attach your quote document.
4. Use the comments field to indicate that you have attached quotations.



COOPERATIVE CONTRACTS

Referencing the Cooperative Contract

1. When in the body of the PO, click 'Add Comments' to open PO Header Comments.
2. In PO Header Comments click 'Use Standard Comments' to open Standard Comments.
3. Enter '99' in Comment Type, 'CC' in the Comment ID, and then click 'OK'. This will auto-populate a standardized paragraph in PO Header Comments.
4. Fill in the referencing your cooperative contract information.

The screenshot displays the 'Express Purchase Order' interface. The main window shows the 'Purchase Order' header with fields for Business Unit (PPS1J), PO ID (NEXT), and Copy From. Below this is the 'Header' section with fields for PO Date (01/08/2016), Supplier, Supplier ID, Buyer, and PO Reference. There are also buttons for 'Supplier Search', 'Supplier Details', 'Header Details', 'Activity Summary', 'PO Defaults', 'Add Comments', 'PO Activities', 'Add ShipTo Com', and 'Actions'. The 'Lines' section shows a table with columns for Line, Item, and Description, with line 1 selected. Overlaid on the main window are two smaller windows: 'PO Header Comments' and 'Standard Comments'. The 'PO Header Comments' window shows 'Business Unit PPS1J', '*Sort Method Comment Time Stamp', and a 'Comments' section with 'Use Standard Comments' selected. The 'Standard Comments' window shows 'Action Copy Comment', 'Comment Type 99', 'Comment ID CC', '*Effective Date 01/08/2016', '*Status Active', 'Description Cooperative Contract', and 'Short Desc Cooperativ'. The 'Comments' field in this window contains a standardized paragraph: 'THIS PURCHASE ORDER IS PLACED AGAINST (CONTRACTING AGENCY'S) SOLICITATION OR CONTRACT # _____ EXPIRING _____ THE TERMS AND CONDITIONS OF SAID SOLICITATION AND CONTRACT APPLY TO THIS PURCHASE AND TAKE PRECEDENCE OVER ALL OTHER TERMS AND CONDITIONS WRITTEN OR IMPLIED.' There are 'OK', 'Cancel', and 'Refresh' buttons at the bottom of both smaller windows.

Tying the PO to the Cooperative Contract

1. Click 'Line Details'
2. Click 'Contract'
3. Click the magnifying glass next to Contract ID. If your Supplier information is filled out, only contracts related to that Supplier will appear. Enter '99' in Comment Type, 'CC' in the Comment ID, and then click 'OK'. This will auto-populate a standardized paragraph in PO Header Comments.

The screenshot shows the 'Contract' details for a GPO Contract. The main window is titled 'Contract' and has a search bar for 'Contract ID'. Below the search bar are fields for 'Contract SetID' (PPS1J), 'Contract ID', 'Contract Version', 'Contract Line', 'Category Line Number', 'Group ID', 'Milestone Line', 'Release' (NEXT), and 'Rebate ID'. There are also buttons for 'Expand All', 'Collapse All', 'View Printable Version', 'Save', 'Notify', and 'Refresh'. The 'Contract' section is expanded, showing 'Contract Details' and 'Receiving' sections. The 'Contract Details' section includes 'GPO Contract' and 'GPO ID' fields. The 'Receiving' section has 'OK', 'Cancel', and 'Refresh' buttons.

SPECIAL PROCUREMENTS

1. Refer to PPS Public Contracting Rule PPS-47-0288.
2. Document the specific PPS Public Contracting Rule your purchase falls under and provide a brief explanation of how your purchase falls under this Rule.
3. Please note that some exceptions require additional forms and documentation to be attached to the PO.

Express Purchase Order

Purchase Order

Business Unit PPS1J
PO ID NEXT
Copy From []

Header ?

*PO Date 01/25/2016 Supplier Search
*Supplier Supplier Details
*Supplier ID
*Buyer
*PO Reference

Header Details PO Defaults PO Activities Actions
Activity Summary Add Comments Add ShipTo Com

Add Items From ?
Catalog Purchasing Kit Item Search

Lines ?

Line	Item	Description
1		

Expand All Collapse All

PO Header Comments

Business Unit PPS1J PO ID NEXT Supplier

*Sort Method Comment Time Stamp *Sort Sequence Ascending Sort

Comments Find | View All First 1 of 1 Last
Use Standard Comments Comment Status Active Inactivate +

Purchase made in accordance with PPS PPS-47-0288 (4) Copyrighted Materials and Creative Works. Student workbooks available from only one source.

Send to Supplier Show at Receipt
 Show at Voucher Approval Justification

Associated Document

Attachment
From -> PO PPS1J-NEXT

Attach View Delete Email

OK Cancel Refresh

BOARD INFORMATION

If competition is typically required but the board has exempted or otherwise approved, please follow the following format:

The screenshot shows the 'Express Purchase Order' interface. The main window displays the following information:

- Business Unit: PPS1J
- PO ID: NEXT
- Copy From: [Dropdown]
- Header section with fields for *PO Date (06/25/2018), *Supplier, *Supplier ID, *Buyer, and *PO Reference.
- Buttons for Supplier Search, Supplier Details, Header Details, PO Defaults, PO Activities, and Actions.
- Buttons for Add Items From, Catalog, and Purchasing Kit.
- Lines section with a table for Line, Item, and Description.

The 'PO Header Comments' window is open, showing the following details:

- Business Unit: PPS1J
- PO ID: NEXT
- Supplier: [Blank]
- *Sort Method: Comment Time Stamp
- *Sort Sequence: Ascending
- Sort button
- Comments section with a table containing one comment: 'Approved per Board Resolution 5275, 05/24/2016'. The comment status is 'Active'.
- Buttons: Inactivate, +
- Checkboxes: Send to Supplier, Show at Receipt, Show at Voucher, Approval Justification.
- Associated Document section with an Attach button and buttons for View, Delete, and Email.
- From: PO PPS1J-NEXT
- Buttons: OK, Cancel, Refresh.

QUESTIONS

If you have questions about documenting competition, please contact Purchasing & Contracting at 503.916.3305 or email purchasing@pps.net.