Best Practices-Purchasing with ePRO

Use This Document For:

Best practices when purchasing with ePRO

A. Contacting Purchasing ASAP for purchases greater than $5,000

- If greater than $5,000:
  - Contact Purchasing to obtain a competitive bid, group purchases, alternative recommendations or receive "sole source justification" approval.
- If under $5,000, or under $1,000 for sponsored programs:
  - check to see if the p-card is acceptable for the purchase.

- *See the Purchasing Card User's Guide on the Purchasing web page.* *http://www.bc.edu/bc_org/fvp/purch/*

- Check to see if the university has a contract in place for this type of purchase.

B. Before starting the requisition online:

- Run a query to see if the vendor and order address you are requesting is available in the PeopleSoft system.
  - See *Step-By-Step 3: Searching for a Vendor*

- Check your budget to see if you have sufficient funding in the applicable account.
  - See *Step-By-Step 1: Inquiring on a Budget*

C. Managing your requisitions on a regular basis:

- Review requisitions on a weekly basis (depending on the level of activity in your department) to make sure that the requisitions are flowing through the system and that they have been sent to the vendors.

Note: You may need to change the dates of the search in order to bring up a requisition that is more than 30 days old.

- Check to see what PO-related payments are being made so that you can verify that you have received the items and that the payments should be made.
  - Query Name: **BC_PO_RECEIVING_REVIEW-PAYMENTS**. (Refer to QR3, pg. 3)
    - Result: Will display what payments are in process and recently paid within your department.