

THE CART

What's happening in Procurement at Virginia Tech

April 2024

End of Fiscal Year Procurements

In order to allow for sufficient time to complete the procurement, receipt and payment cycle, requisitions should be received in Procurement by the following dates:

May 10th, 2024: All purchases valued under \$200,000 which will require Procurement processing and all computer hardware of any value. Last day for Pcard purchases to be applied to FY24 funds.

Procurement will continue to accept and act upon requisitions received after these dates. However, no assurance can be offered that the business cycle will be completed before the end of the fiscal year.

HokieMart: Purchase orders to outside suppliers may continue to be processed in HokieMart using Punch-out catalogs, hosted catalogs for contract suppliers, contract suppliers, and non-catalog suppliers where the value is under \$10,000 with the exception of software. All software must be reviewed prior to purchase.

The above cut-off dates do not apply if the goods/services can be received and invoiced prior to the Controller's Office June 14th final date for processing invoices. If goods/services cannot be received and invoiced by the final date, users must apply the accounting date of 7/1/24 to avoid an encumbrance against FY24 funds.

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Tips for Procuring Software

- The most efficient way to get a software need met on campus is to utilize [Cobblestone](#), the [Software Service Center](#) (SSC), or [Collaborative Computing Solutions](#) (CCS) to leverage already approved software or software the University has enterprise, contract pricing for. If you are not able to find a solution in Cobblestone or through [consultation](#) with SSC or CCS, your department may be able to use the [Low Risk, Low Cost portal](#) if your software meets the following criteria:
 - the software costs under \$10,000 during the contracted period;
 - will not have a data integration with any University enterprise software system;
 - will not have a data integration with a system that processes or store moderate-high risk data;
 - will be used in accordance with FERPA restrictions and will not contain any personally identifying information;
 - will be utilized within a single administrative area or discrete research project; and
 - will not be used for facilitating the collection of money.
- We highly recommend requesting quotes from the University's value-added resellers as they are able to offer many software programs, licenses, and subscriptions from a variety of vendors. The value-added resellers can offer preferential pricing and allow the University to leverage an existing contract and contract terms. Reviews tend to be shorter when working with a value-added reseller.
 - Contact information for value-added resellers can be found [here](#).
- Software use cases that may require a substantial review include:
 - student data being shared with a web-based (hosted) solution, including student names and email addresses;
 - software that will be utilized by more than 1,000 users campus wide;
 - software storing Social Security Numbers, credit or debit card numbers, financial account numbers, driver's license numbers or state identification numbers, military identification, or passport numbers;
 - software processing electronic payments from the public or VT affiliates;
 - and software that will integrate with University enterprise systems.
- The definition of software includes: software licenses and applications, websites, browser plug ins, subscriptions, databases, software-as-a-service, platform-as-a-service, infrastructure-as-a-service, and maintenance or upgrades of existing software.

How To Buy New Software:

- If the software is new to the University, does not qualify for low risk or low cost, and you cannot find it listed as approved in Cobblestone or through SSC or CCS, this software must go through the Division of IT's software review process and be approved by the appropriate University data stewards prior to purchase. **Please note the Division of IT's review can take several months to complete and should be submitted far in advance of your implementation date.**
- To initiate this review process, you will submit a [HokieMart](#) requisition and use **account code 12755**. This account code stops the requisition in Procurement's queue to initiate reviews.

Tips for Procuring Software (cont'd)

- Please attach an official quote from the vendor, any license agreements, terms of service, privacy policies, statement of work, or other documents requiring signature by the vendor. Any documentation demonstrating your department's use case for the software is helpful as well. In the comments or internal notes, please specify who the end user in your department will be.
- Once your requisition is submitted, a Buyer will contact you via HokieMart comments alerting you that the review has begun. Often, the Buyer will have follow up questions for you or the end user of the software, if different from who entered the request.
- Throughout the review process, a Buyer will liaise with the vendor, the Division of IT, University data stewards, and your department. You can anticipate an update from your Buyer approximately every two business days.
- Once the software has completed all required approved, the department will be notified via HokieMart comment and a PO will be issued. If applicable, an IT contract or License Agreement will be created in HokieMart for the department's future use.

Reminders for Low Risk, Low Cost Software Approvals:

- In order to put software on your University P Card, your department must receive approval first. This will often be through the Low Risk, Low Cost software portal. Once approved via Low Risk, Low Cost, please attach your approval email as documentation in your reconciliation.
- If you have a moderate-high risk software that can only be paid by the P card, you or your Procurement buyer will need to request a P Card lift via email to purchasecard@vt.edu.
- Low Risk, Low Cost software approvals are not blanket approvals. This means if you purchase Chat GPT, for example, in January for \$20 and submit a Low Risk, Low Cost request for \$20, you cannot use that same approval for your February invoice. Instead, you would need to either submit an annual request of \$240 that would cover all monthly invoices in the year, or you would need to submit a new \$20 request each month that your department is using the software.

2024 SWaM Vendor Fair Raffle Winners

Procurement would like to thank everyone for coming out to the 2024 SWaM Vendor Fair. Your participation made this year a success! We are happy to announce the following winners of our door prizes. To receive your prize, please visit the Procurement Office at the North End Center, 300 Turner Street, Suite 2100, and collect it from the reception desk. If you are unable to collect your prize in person, please contact ryan.sonya@vt.edu to arrange an alternative method of delivery. In case the winner selected does not accept the prize or fails to pick it up from the Procurement Office by 4:00 p.m. on Friday, April 12, 2024, another winner will be randomly chosen.

- Kroger -- Amy Cole
- 622 North -- Amanda Shepard
- Top of the Stairs -- Ben Evans
- The Cellar -- Terry Kingrea
- PK's -- Jennifer Dowdy
- Mill Mountain -- Devin Henry
- Starbucks -- Debora Harry
- Buffalo Wild Wings -- Hannah Pratt
- Benny's -- Sherry Hollandsworth
- Jimmy Johns -- Natalie Langowsky
- Souvlaki -- Lexi Simmers
- Gillies -- Scott Lewis
- Sugar Magnolia -- Sharon Stacy
- Greens Grill & Sushi Bar -- Eva Ryan
- Sharkeys -- Kyra Heatherman
- Cabo Fish Taco -- Angela Harrison
- VT Baseball Tickets -- Samantha Smith

New Fund Series Available for Request: Departmental America To Go Funds Linked to Virginia Tech Foundation Funds

The Controller's Office is excited to announce departments may now request a new university fund to be used for Virginia Tech foundation funded America-to-go orders placed via HokieMart. Requestors need to provide the organization code and VTF fund number to which the new university fund will be associated. A department may request as many university funds as desired (a 1:1 relationship between the university fund and VTF fund is required). In order to receive one of these new funds, a departmental approver must certify the following:

- The VTF fund number provided has sufficient funds to cover purchases made through America To Go using university systems;
- The university fund provided will only be used for purchases made via the America-to-go process & procedure that need to be billed to and paid by the Virginia Tech Foundation;
- The fund provided will be reviewed monthly in the normal course of business along with other monthly fund financial reviews in accordance with university policy 3100;

An accompanying policy is forthcoming that will be available on the Controller's Office website soon. Any questions can be directed to genactg@vt.edu.

Streamlining Supplier Updates in HokieMart

Simplify Your Procurement Process with the New Supplier Feature

Procurement understands the importance of keeping supplier information up-to-date and strives to make the ordering process as smooth as possible. In line with these efforts, we want to remind our Hokie community about the utilization of the "New Supplier" feature in HokieMart. The same process can also be used to create a new vendor can be used to update an existing vendor's information.

How Does It Work?

When you are creating a new requisition and you know that your supplier's details have changed, instead of selecting the supplier's name, type in the name "**New Supplier.**" This will let HokieMart know to route your requisition to our vendor team for review.

What Information to Provide?

In the Internal Notes section of your request, it's important to include all relevant details about the supplier. Here's what you need to include:

- **Supplier's Name:** List the full name of the supplier. Do not use initials unless that is their actual name, like IBM. If the vendor has multiple names, use the one that will appear on the 'remit to' section of the invoice, if known.
- **Banner ID:** If available, provide the last four digits of the supplier's Banner ID for easy identification.
- **Contact Information:** Include the supplier's physical address, phone number, and a fax or shared email address for purchase order delivery.

Attaching any documentation that you may have will facilitate the review process. This could include a quote, invoice, or address change notification. Remember that W8/W9 forms should be sent to AP directly (<https://controller.vt.edu/resources/accountspayable/dropbox.html>) and never sent through HokieMart.

By supplying this detailed information, you will enable our team to efficiently review and determine the necessary course of action.

Please be aware that not all of a vendor's addresses are going to be loaded into HokieMart. Only a vendor's physical address will be used, as this is the address that should be listed on a purchase order. Due to the rise of online banking and direct deposits, a business's payment address is frequently not going to be its physical address. Payment addresses can be viewed in Banner.

We value your cooperation in utilizing the New Supplier feature within HokieMart. By working together, we can uphold the highest standards of procurement effectiveness and precision.

Community Service

The Community Service Committee will hold a drive for the Women's Resource Center. We will be collecting items from May 01, 2024, through May 31, 2024. You can contact Deb Lowe at deb2@vt.edu or Emma Ruby at emmaru97@vt.edu for drop-off points, and more information.

We will be sending out a flyer soon for this event.

We will also be doing a Food Drive for Micah's Backpack in September. We will be collecting items from September 02, 2024, through September 30, 2024.



Promotional Items Approval Forms

Please utilize the new Promotional Items Approval Form to document departmental approval to order promotional items for official university business (recruiting, advertising programs, etc.). Attach the completed form to the HokieMart Purchase Order along with the vendor quote.

Preapproval by the Controller's Office is only required for orders exceeding \$2,000 beginning March 1.

The following guidelines apply to the purchase of Promotional Items with university funds:

- Promotional items may be provided to current and/or prospective students, guests, and the general public. Only departments that provide services directly to university employees (ex: VT Police, Hokie Wellness, etc.) may purchase promotional items to provide to employees from other departments.
- Promotional items must not be purchased with the intention of providing the items as gifts (given in appreciation of a donation, service, etc.)
- University funds should not be used to purchase promotional items on behalf of a student club or organization.
- Promotional items should cost no more than \$20.00 per item including all set-up fees, design fees, shipping costs, etc.

Contact Brad Foster (bcfoster@vt.edu) with questions.



Have Suggestions?

Tell us how we are doing by using the link below:

[Give us your feedback](#)

PROCUREMENT SPOTLIGHT

We would like to take the opportunity to introduce the key figures in software procurement:

Jennifer Crawford brings 17 years of procurement expertise to her role as a Senior Buyer with IT Procurement, coupled with a 26-year career at the university. Jennifer cherishes her time outdoors, whether it's camping or simply enjoying nature, and values quality moments with her family.

Roger Gupta, a veteran at Virginia Tech with 32 years of service, including 20 in Procurement, shares a passion for photography, music, and Hokie sports. He co-manages a non-profit supporting a girls' orphanage in Patiala, India, a cause close to his heart, recently aiding in a significant renovation that enhanced both their living and learning environments. Roger's photography, inspired by his father's legacy, captures music festivals and more, achieving recognition in various prestigious outlets, including the cover of the National Endowment for the Arts Magazine in 2011.

Dean Ramsey joins us with a rich background in procurement, boasting 1.5 years at Virginia Tech as a senior buyer, and an additional 15 years in various procurement roles. Dean, a Roanoke native, is also a proud veteran of the Marine Corps, where he served in both active and reserve capacities. Married for over 30 years and a father to two sons, Dean values family time, actively participates in his church, and enjoys hunting, fishing, and hiking. An interesting fact about Dean is that he is the current custodian of the highly esteemed Procurement trophy—a story worth hearing directly from him!

Emma Ruby, who transitioned to Procurement in 2023 after serving as a project manager at the Center for Economic and Community Engagement, has quickly found her niche. Since joining Virginia Tech in 2021, Emma appreciates the diversity of procurement activities, from cybersecurity and transportation to agriculture, reflecting the university's wide-reaching initiatives. Emma enjoys running on the Huckleberry Trail, exploring new recipes, and traveling in her leisure time.

We're delighted to have such a dynamic and experienced team leading our IT procurement efforts and look forward to the contributions they will make towards advancing our department's mission.



Jennifer, Dean, and Emma



Roger Gupta

Hands On Training for HokieMart Requestors Now Being Offered:



- Apr 24th 2024 (Zoom)
- May 29th 2024 (In person)
- Jul 31st 2024 (Zoom)
- Aug 28th 2024 (In person)
- Sept 25th 2024 (Zoom)
- Oct 30th 2024 (In person)
- Nov 20th 2024 (Zoom)

Registration Required
through [PageUp](#)

A small bird is perched on a wooden post in a field, with a blurred background of trees and a sky.

DID YOU
KNOW?

Competition Threshold Friendly Reminder

A friendly reminder that when purchasing goods from non-contract vendors, the competition threshold is \$10,000. This means that whenever the grand total exceeds this amount, Procurement requires additional documentation to be provided. Regardless if the purchase is made up of supplies, consumables, equipment, etc. the grand total of the purchase is the determining factor used by Procurement. Depending on the nature of the purchase, you may be asked to obtain up to 3 quotes or fill out a sole source form. When 3 quotes are obtained, the lowest offer is proceeded with. A sole source is only applicable when the goods are only available to purchase from one company. Subjective factors such as quality or customer service cannot be used as determining factors for sole source justifications.

If you are unsure how to proceed with a purchase over the competition threshold, please reach out to the Procurement department for guidance.

UPCOMING EVENTS

ABC's of Procurement Part 1
Sign Up on [PageUp](#)

ABC's of Procurement Part 2
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