

Purchasing Forum

4/5/19

uwgppurchasing@westga.edu

The content of this presentation was the most up-to-date information available at the revision date. However, policies, procedures and guidelines may be updated during an academic year. Please refer to the [University Policy website](#) for the most current version of these policies, procedures and guidelines.

Revised 4/2019



Central Stores & Receiving Update

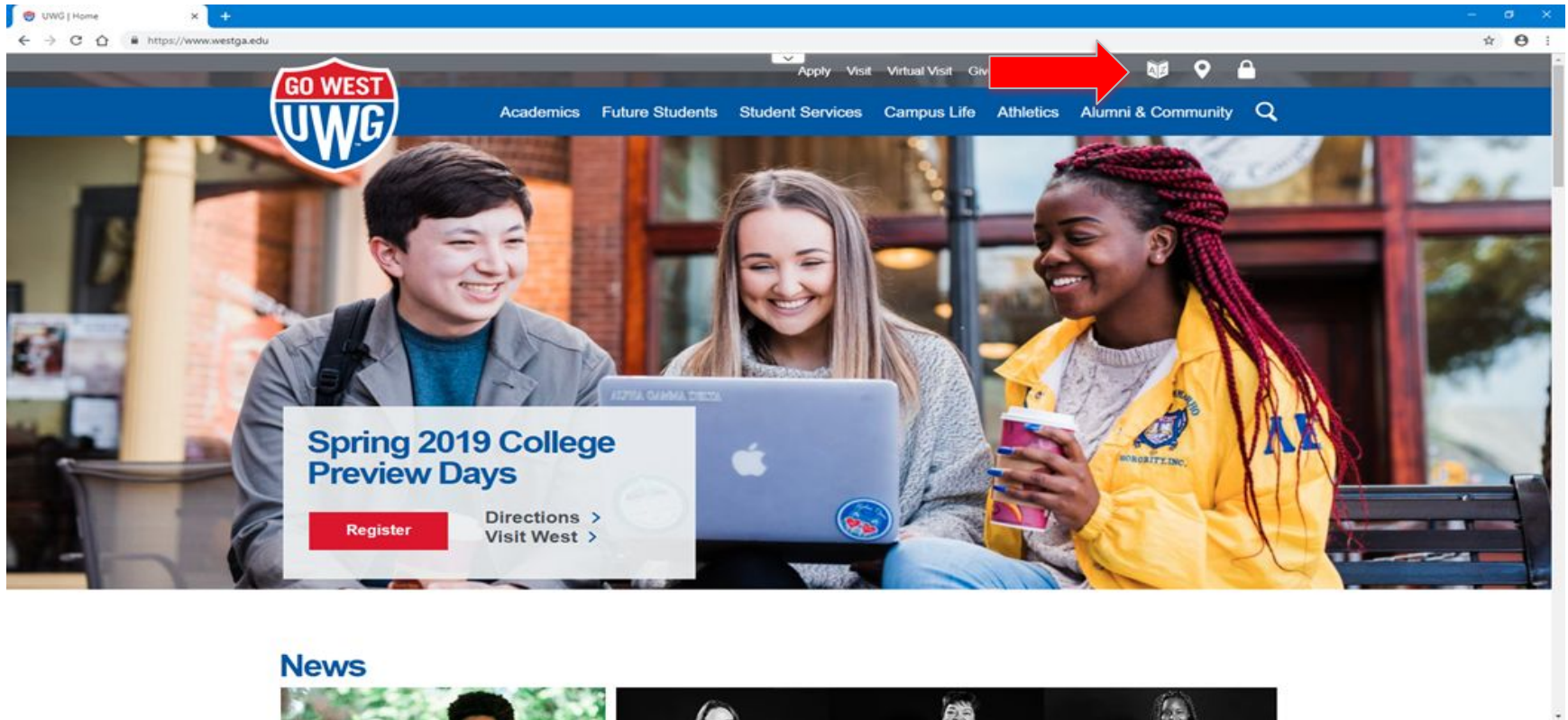
- Campus Convenience!
- GEPS-who??
- Items available: glass cleaner, bleach, tile cleaner, gloves, safety glasses, plumbing supplies, towels, tissues, disinfectant, paint, paint brushes, box cutter, trash bags, clorox wipes, batteries, copy paper 30% or more recycle
- Personal packages do not deliver to UWG, CSR&D sign for them owner will have to pick package up.
- **uwgcentralstores@westga.edu**



Central Stores Web Order Process



1. Go to westga.edu and click on the A-Z index



2. Click on the letter C then click on Central Stores, Receiving & Delivery

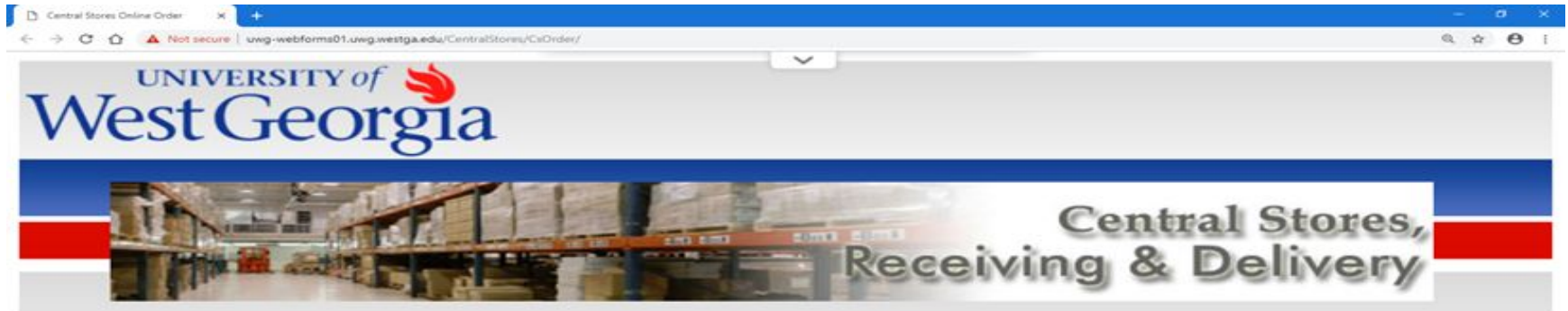
The screenshot shows a web browser window with the URL <https://www.westga.edu/directories.php>. The page features a blue header with the 'GO WEST UWG' logo and a navigation menu with links for 'Academics', 'Future Students', 'Student Services', 'Campus Life', 'Athletics', and 'Alumni & Community'. Below the header is a list of departments, each on a separate line. A red arrow points to the entry 'Central Stores, Receiving & Delivery'. Other departments listed include 'Center for Adult Learners and Veterans', 'Center for Business and Economic Research (CBER)', 'Center for Business Excellence (CBE)', 'Center for Economic Education (CEE)', 'Center for Public History', 'Center for Student Involvement', 'Center for Sustainability', 'Center for Teaching and Learning', 'Chapel', 'Cheerleading', and 'Chemistry'. A 'GO WEST UWG' logo is also visible in the bottom right corner of the page.

3. Toggle over Central Stores then click Central Stores Order Application

The screenshot shows the website interface for West Georgia State University's Central Stores, Receiving & Delivery. At the top, there is a navigation bar with the 'GO WEST UWG' logo and links for 'Academics', 'Future Students', 'Student Services', 'Campus Life', 'Athletics', and 'Alumni & Community'. Below this is a large banner image of a brick building. A secondary navigation bar contains links for 'Shipping', 'Central Stores', 'Material Safety Data Sheet', and 'About Us'. A dropdown menu is open under 'Central Stores', with a red arrow pointing to the 'Central Stores Order Application' option. The main content area features a 'Welcome to the Central Stores, Receiving & Delivery' section and a 'Contact Us' section with phone numbers and an email address.



4. Type one keyword for the item you are looking for in the search box. For example, if you are looking for copy paper then type “paper.” If you are looking for batteries then type “batt.” You may also click search to view all items in inventory.



Inventory Lookup

This page provides you with the opportunity to look up Warehouse inventory parts based on the DESCRIPTION. It will display inventory which has words in the description that are LIKE the word you put in the search Keyword.

Search Keyword: Ex: Paint, Box, Tape

Search

Reset

Home



5. Complete the customer information. Check the order box on the line of the item you need and type in the quantity of how many you need in the Qty box. Click submit to place the order.

Inventory Search/ Email Order Request

Listed below are the parts which had descriptions that contained the search keyword. If you would like to submit an email order for any of the parts, please fill out the customer information, check the items "Order" box and enter the quantity you wish. When you are finished ordering, click the Submit button. An email order request will be sent to the warehouse and you will receive a confirmation email.

CUSTOMER INFORMATION

Your Name:

Your UWG Email Address: Email example: sjones@westga.edu

Your Dept Number: IE: 1045101- the NUMBER, not the name

Chg.to Fund: Required for budget check.

Chg.to Account: IE: 10000-1001110-11100-11000-714130

Search Keyword: BATT

Part#	Description	UOM	On- hand	Unit Cost	Order?	Qty
C-0457B-004	604105 NUMATIC BAGS FOR BATTERY	EA	18	\$14.95	<input type="checkbox"/>	
E-19560-001	BATTERIES CR2032 LITHIUM THINK CO PK	EA	6	\$4.44	<input type="checkbox"/>	
E-28506-015	BATTERY CP12-7 0(12V7 0AH) COOPOV	EA	2	\$22.54	<input type="checkbox"/>	
E-28595-005	BATTERIES AAA	EA	288	\$0.36	<input checked="" type="checkbox"/>	12
E-28595-010	BATTERIES C	EA	20	\$1.00	<input type="checkbox"/>	
E-28595-015	BATTERIES D	EA	36	\$1.02	<input type="checkbox"/>	
E-28595-020	BATTERIES 9 VOLT	EA	31	\$1.44	<input type="checkbox"/>	
E-28595-025	BATTERIES 6 VOLT W/SCREW	EA	3	\$7.47	<input type="checkbox"/>	
E-28595-030	BATTERIES CR123A 2/PK	PK	19	\$6.29	<input type="checkbox"/>	
E-45032-005	FLASHLIGHT, LANTERN HEAD W/BATT	EA	1	\$22.96	<input type="checkbox"/>	



Year End is Coming...

5/24/19 **Last day** for routine P-card charges to be charged for FY19

5/31/19 May P-card reconciliations due to Purchasing (early deadline)

6/4/19 Last day for Marketplace & special requisitions in ePro-all must be electronically approved and passing budget check by 5:00pm

6/7/19 Last day for fuel pumped at Central Stores to be **charged to FY19**



MEANWHILE

**IN THE PURCHASING
DEPARTMENT...**

makeameme.org



Year End continued

New!!! **Wednesday 6/26/19**

Last day to receive items in ePro for FY19.

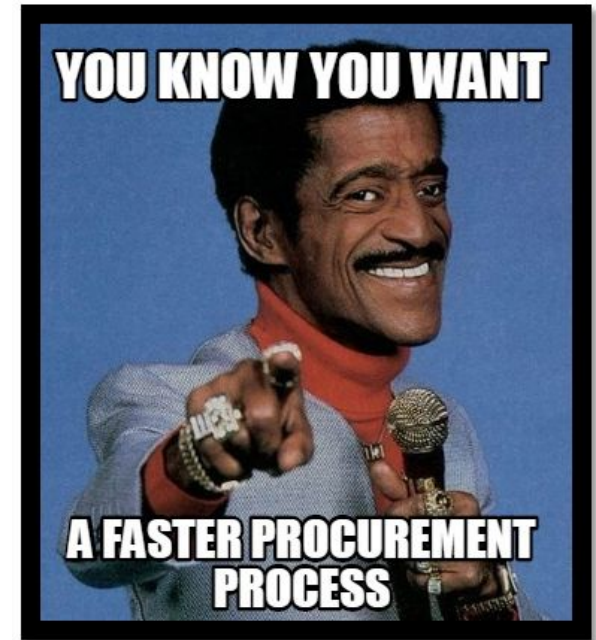
All items delivered after this date should be received electronically once Peoplesoft opens in July.

Check Purchasing website for any updates!



Recent Updates

- Purchasing items with personal funds
 - Not best practice
 - Potentially not reimbursed
 - State does not reimburse taxes
- Shipping address - **ALWAYS USE UWG**
University of West Georgia
1601 Maple Street
Carrollton, GA 30118
- Personal Packages - Do not ship to UWG.
- Any items paid for with institutional funds should be shipped to UWG and not a personal address.



Purchasing 101 Defined

Two types of statewide contracts:

- 1) Mandatory-mandated by law
- 2) Convenience-provided as a convenience

What if a mandatory contract is available but does not meet your requirements? A request for waiver on your behalf to purchase the item from another source with a reasonable justification: (Examples-significant cost savings - minimum 10%, compatibility issues, specials needs not covered by existing contract, delivery time factors)



Tips and Reminders

Contracts

- Who has signature authority??
- Any contract, agreement, credit application, vendor profiles for outside suppliers should be sent to Purchasing for signature.
- Standard one page service agreement available on Purchasing's website
- Send anything with terms & conditions for review (both paper or electronic)
-



Recent Updates

- Lowe's is on contract - 5% cards - PO's/P-Card, invoices/delivery tickets to Accounts Payable
- Adjustable sit stand desks comparable options are available on contract thru Workrite & GCI (Georgia Correctional Industries)



Commonly used state contracts

- Furniture
- Staples
- B&H
- McKesson
- Apple
- Software
- SCW
- Airgas



uwgpurchasing@westga.edu





IT Purchases

- All new systems/applications must be submitted through the Office of IT Strategic Planning for review & ranking.
- Submit IT solutions/software/applications with year-end funding by Friday, May 3. This allows sufficient time to review project feasibility and present to the IT Steering Board.
- Projects are ranked by the IT Steering Board. Projects are worked in the order they are received unless otherwise justified and re-ranked by the Steering Board.
- Applications that allow the acceptance of Credit Cards must go through the PCI Committee.
- Project proposals require approval from the requesting unit at at least the AVP level before review can begin.
- Tech purchases over \$250,000 must go through USG
- We cannot guarantee that projects submitted for year-end funding will be implemented by the start of the Fall Semester.



IT Purchases

- Project Proposal Link:
<https://ipmo.westga.edu/General/NewProject.aspx>
- Questions on IT Projects?
Email ipmo-list@westga.edu



Software Update

- Cannot be reimbursed for software/apps put on personal computers or cell phones
- Prohibited p-card purchase eff 5/1/19
- Needs to be done via PO
- contact ITS (approval) & Purchasing (state contract pricing availability)



Software Contract Suppliers

Category Description

Category 1: End User Software. Generally, these are desktop software products

Category 2: Enterprise Software. These are server-based system.

Category 3: Microsoft Reseller Services.

Category 4: Oracle Software and Databases (including Peoplesoft)

SHI	SoutheastTeam@shi.com
Dell	Brad_stroup@dell.com
PC Specialists	Robert.Kopesky@tig.com
CDW-G	Mikezor@cdwg.com
Presidio	ballen@presidio.com
IBM	erice2@us.ibm.com



Need to Know

P-Card

- Promo items bought for giveaways should be done via PO or check request...no P-card
- Amazon charges
- Reminder-only full time employees eligible
- Plan Amendments Effective 5/1/19
- Software must be purchase via PO
- Undocumented sales tax charges
- No altering of google log transaction after approval are in place (new major violation)



P-Card

Reminder about Violation Policy

- 3 minor violations=card suspension 1 month
- additional violations...case-by-case basis, but puts account on probation status
- refresher training required by card holder & encouraged by approvers to continue card use



Tips and Reminders

ePro

- More is better!
 - **Always** attach a quote, contact name, email, phone number in comment section
 - Special delivery instructions
 - Special handling instructions
- Description of items - Audits
- Invoice/Receiving - send to apinv@westga.edu
- Always enter a supplier
- *Approvers-denying a single line of a requisition causes all lines to be denied*



Expand lines to review shipping and accounting details

Add More Items

Requisition Lines

Line	Description	Item ID	Supplier	Quantity	UOM	Price	Total	Details	Comments	Delete
1	Item # 2576 Ultra Cotton T-shi		Ozier Products, Inc	150.0000	Each	5.5000	825.00		Edit	

Select All / Deselect All Select lines to: Add to Favorites Add to Template(s) Delete Selected Mass Change

Total Amount 825.00 USD

Shipping Summary

Edit for All Lines

Ship To Location PURCHASING
Address University of West Georgia
 Cent Rcvg for Purchasing Dept.
 1601 Maple Street
 Carrollton, GA 30118
Attention To Udin,Alexandra C
Comments

Requisition Comments and Attachments

Enter requisition comments

Alex Stewart Quote for Student Promo giveaways.
astewart@westga.edu
678-839-6395

Send to Supplier

Show at Receipt

Shown at Voucher

Approval Justification

Enter approval justification for this requisition

Check Budget

Save & submit

Save for Later

Add More Items

Preview Approvals



Home



My Preferences



Requisition Settings



0 Lines

Checkout

Search

All

Search

Advanced Search



Web

Browse Supplier Websites

GAFirstMarketplace



Express Item Entry

Create an Express Requisition



Special Requests

Create a non-catalog request



Forms

Create and Submit Forms



Favorites

Browse Favorite Items and Services

1/28-1/31 - Huntsville and F...



Templates

Browse Company and Personal Templates

Sports.Med.MEDCO Bid#1003512...

SportsMed. 2013 PSS-Order

Athletics-NEW REVISED FB Del...

Bill Green FY14 Cellphone

Office supplies 8-20-2013

More...



ePro Services

Request Services

Fixed Cost Service

Variable Cost Service

Time and Materials



Recently Ordered

View recently ordered items and services

CH-302430 Three Drawer Chest...

PP Electrical repairs to ac...

Shipping

Dye sub printer bundle to in...

Sparrow Agency Check for 12-...

More...

Requisition Settings

Business Unit University of West Georgia **Requisition Name**

***Requester** Udin,Alexandra C **Priority**

***Currency**

Default Options ?

Default

If you select this option, the defaults specified below will be applied to requisition lines when there are no predefined values for these fields.

Override

If you select this option, the defaults specified below will override any predefined values for these fields, only non-blank values are assigned.

Line Defaults ?

Supplier

Category

Supplier Location

Unit of Measure

Buyer

Shipping Defaults

Ship To

Add One Time Address

Due Date

Attention

Ship Via

Freight Terms

Distribution Defaults

SpeedChart

Accounting Defaults

Personalize | Find | First **1 of 1** Last

- Chartfields1**
- Chartfields2
- Chartfields3
- Details
- Asset Information

Manage Requisitions

- Epro>Manage requisitions> Date From> special request or Marketplace.
- Dispatched purchase order- not received ?
- Received and Not paid?
- Please send all invoices to Accounts Payable for processing.
- **Email invoices to apinv@westga.edu**
- **Setting up a new vendor:**
- Send completed vendor profile, ACH & W-9 forms to vendor@westga.edu



Manage Requisitions

Business Unit

Requisition ID

Date From

Requester

Requisition Name

Request State

Date To

Entered By

Budget Status

Origin

PO ID

[Show Advanced Search](#)

Req ID	Requisition Name	BU	Date	Request State	Budget	Total			
0000529972	Desk for Georgia Evans	54000	04/03/2019	Pending	Not Chk'd	643.62 USD	[Select Acti v]	Go	
0000529971	Annex Work Room Unit	54000	04/03/2019	Pending	Not Chk'd	560.50 USD	[Select Acti v]	Go	
0000529948	Ed. 204/205 Tech Fee FY...	54000	04/03/2019	PO(s) Created	Valid	19,375.50 USD	[Select Acti v]	Go	
0000529923	Printer for H. Chambers	54000	04/02/2019	PO(s) Created	Valid	160.54 USD	[Select Acti v]	Go	
0000529868	Coliseum 2106 Tech Fee ...	54000	04/01/2019	PO(s) Created	Valid	15,471.84 USD	[Select Acti v]	Go	
0000529841	CyberCamp Supplies_3.29.19	54000	03/29/2019	PO(s) Dispatched	Valid	230.00 USD	[Select Acti v]	Go	
0000529813	OFE Office Supplies_3.2...	54000	03/28/2019	Received	Valid	148.00 USD	[Select Acti v]	Go	



Requisitions ?

To view the lifespan and line items for a requisition, click the Expand triangle icon.

To edit or perform another action on a requisition, make a selection from the Action dropdown list and click Go.

Req ID	Requisition Name	BU	Date	Request State	Budget	Total		
0000529425	0000529425	54000	03/15/2019	Received	Valid	12.60 USD	[Select Acti v	Go

Requester Entered By Priority Medium

Pre-Encumbrance Balance 0.00 USD

The diagram shows a horizontal timeline with an arrow pointing right. Above the arrow are icons for each stage: a document with a star (Requisition), a document with a checkmark (Approvals), a warehouse (Inventory), a document with a shopping cart (Purchase Orders), a document with a pencil (Change Request), a truck (Receiving), a truck with a return arrow (Returns), an envelope (Invoice), and a document with a dollar sign (Payment). Below the arrow, the names of these stages are written.

Request Lifespan:

Line Information		Personalize Find First 1 of 1 Last						
Line	Description	Status	Price	Currency	Quantity	UOM	Supplier	
1	Rome and Jerusalem: The Clas...	Received	12.6000	USD	1.0000	EA	Complete Book & Media Supply, Inc	





Tips & Reminders

Food Purchases

- Should **NEVER** be made via GA First Marketplace!!
- All food purchases must have a pre-approved food form from Accounts Payable.
- Send quote, food form, list of attendees and event flyer to *A/P* in Controller's Office for approval before entering a requisition.



Tips and Reminders

Copier Leases

- Options available:
 - Canon, Ricoh, Xerox, Toshiba

Canon

allison@coec.com

Ricoh

stan.fuhr@ricoh-usa.com

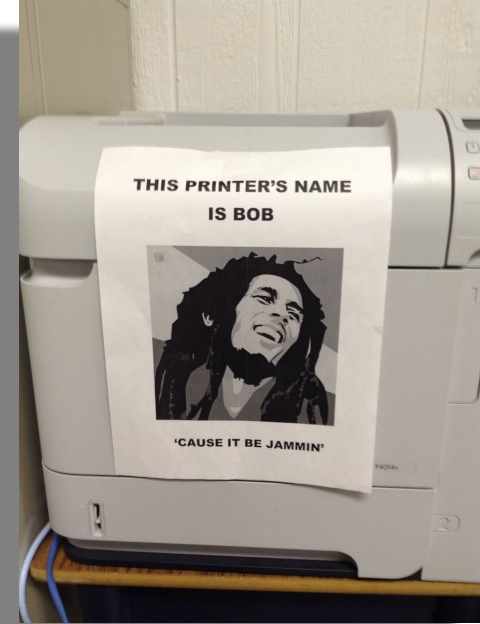
Xerox

terone.harrisjr@xerox.com

Toshiba

casey.eidson@tbs.toshiba.com

- Desktop Printer contract-convenience



Tips and Reminders

Cellular/Data Devices

- Options Available: Verizon, T-Mobile, AT&T
- NIGP Codes
 - Cellular Voice Devices - 83935
 - Cellular Monthly Charges - 91575
 - Data Devices - 83840
 - Data Monthly Charges - 91551
- Account Codes
 - Cellular - 771300
 - Data - 771800

Notify Asset Mgmt to surplus old equipment please



Tips and Reminders

Promotional Items

- State contract coming
- Options (attend the Oct vendor fair)
- NIGP Codes
 - Promotional Items - 03778
 - Set Up Charges - 96642
- Vendor have permission to use UWG logo?

Sherri Shelnut - Coordinator Marketing and Communication
email:sshelnut@westga.edu



Kahoot

- Smart phone, Tablet, or Laptop
- Open web browser:
- kahoot.it
- Game Pin: _____



Puppies and Rainbows



Taxable Fringe Update

What has changed:

- Effective January 1, 2019
- Wearable items can only be purchased through ePro or a direct charge form at the UWG bookstore.
- Taxable Fringe forms can be found on the purchasing website: under Forms, General.



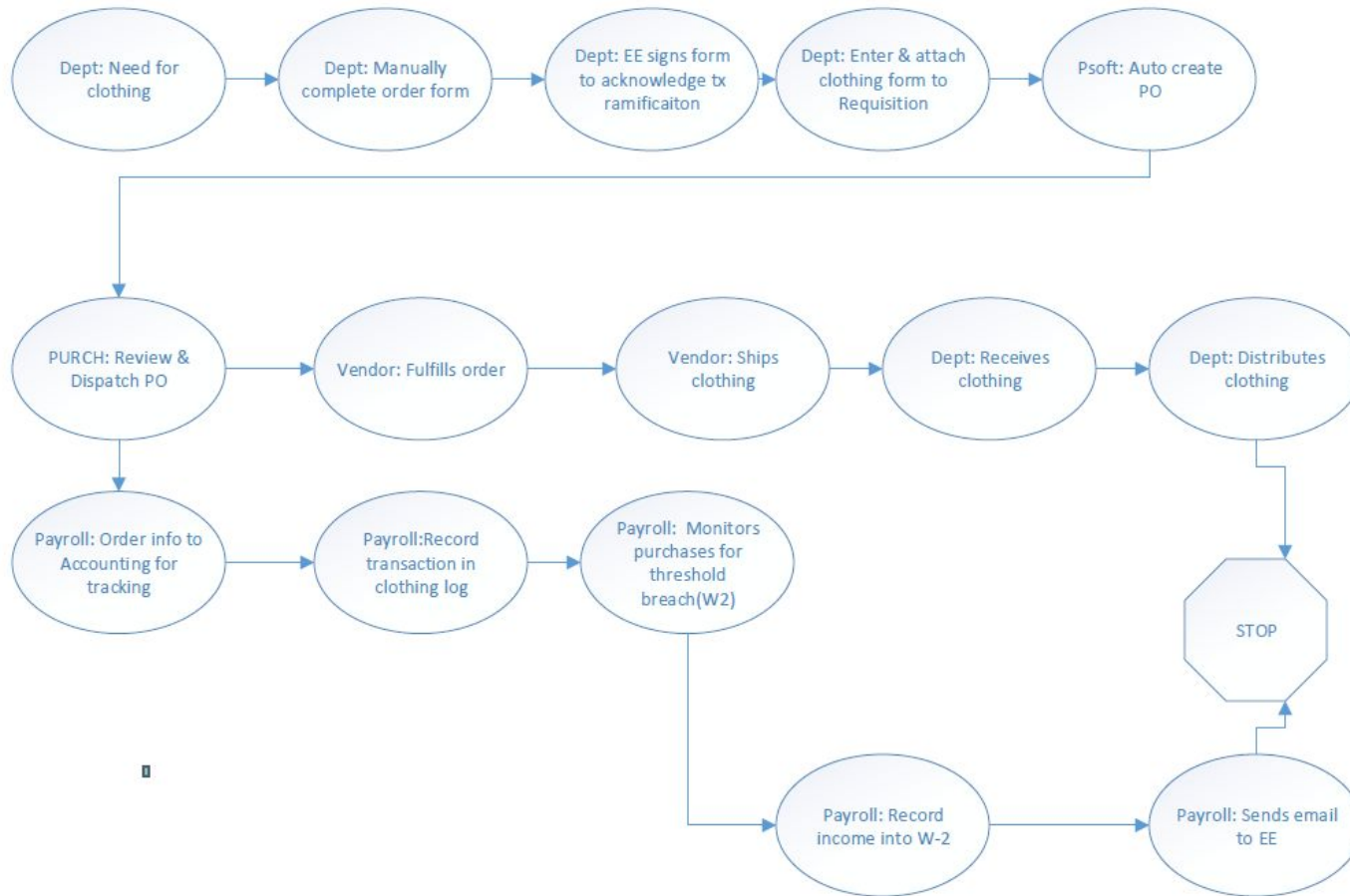
Taxable Fringe Update

- **To expedite processing of Purchase Orders please attach:**
 - Copy of the quote
 - Signed Taxable Fringe Form (PDF)
 - Excel version of the Taxable Fringe Form
- Accounting will review and track purchases to determine taxability and will provide periodic updates to ensure no purchases were missed.



Taxable Fringe Update

Tracking clothing purchases



University of West Georgia

TAXABLE FRINGE REPORTING FORM

This form is used by the University departments to report wearable items, including clothing, uniforms, and accessories provided to employees.
 UWG Purchasing Services will review and forward information to Payroll for tax withholding and W-2 reporting, as required by federal law.

Today's Date:

Requisition #

Department Name:

Contact Email:

Contact Name for this form:

Contact Phone:

(XXX) XXX - XXXX

Method of Payment

Requisition / PO:

Check

Internal Billing Form

Check

Please attach the completed form to your ePro requisition or internal charge request form at the UWG Bookstore.

Employee ID

Last Name

First Name

Amount

Brief Description of the Wearable Item(s)

Job Title

Employee Signature

9999999

Doe

John

\$ 75.00

(3) Embroidered Sport Tech Polos

Controller



Total: (Should match Quote)

\$ -

Employee signature(s) acknowledges wearable items are being ordered on their behalf, and may have a taxable impact.

A copy of the Excel Spreadsheet, & a signed copy of this sheet must be attached to the ePro requisition for the PO to be processed.

Additional Information/Explanation:

Important Links

- [Purchasing Website](#)
- [CSR&D](#)
- [NIGP Codes](#)
- [P-Card Plan](#)
- [Account Codes](#)



THANK YOU FOR ATTENDING!!

See you at the Vendor Fair Friday
October 4th, 2019 @ The Coliseum

