



PROCUREMENT SERVICES

CAMPUS NEWS & INFORMATION

Procurement Services eNews chronicles UW procurement news and information to assist faculty and staff in staying knowledgeable by providing tips and guidance, and details about upcoming improvements with UW systems or processes in our rapidly changing procurement landscape.

PLEASE NOTE THAT NOT ALL TOPICS IN THIS NEWSLETTER APPLY UNIVERSALLY ACROSS ALL UW DEPARTMENTS AND MEDICAL CENTERS. ALWAYS FOLLOW YOUR OWN DEPARTMENT POLICIES.

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Headline News



Procure to Pay eProcurement Project is Fully Deployed

Use eProcurement (Ariba) for the Majority of your Purchasing Needs (*some exceptions apply*)

What Does This Mean?

- PAS Requisition module is closing down December 31, 2015 – in order to prepare for this closure we recommend campus stop using PAS for any new requisitions by September 30, 2015
- PAS Access to create new requisitions will be disabled

What Actions Should I Take?

- Continue to review your current open PAS POs
- If orders end by 7/31/15 no further action is required
- For orders that extend past 7/31/15

- Procurement Tips & Tricks
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Quick Links

- [Procurement Services Website](#)
- [Ariba Buying Portal](#)
- [Newsletter Archive](#)

About Procurement Services

- [Organization Chart](#)
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- Review [PDR Supplier Search](#) to make sure that supplier is registered in the [Ariba Network](#)
- If the supplier is registered in the Ariba Network
 - initiate a new Contract Request in Ariba
- If the supplier is not registered in the Ariba Network
 - Go to the [Ariba Network Registration Request Web-form](#) to complete the registration request form and submit
 - The registration request form is sent to Procurement Services which initiates the registration process with Ariba
 - Suppliers are able to take action on all Ariba registration tasks in the same day, however this doesn't always happen (for this reason, the process can be as short as 1 business day, up to several weeks)
 - Check the [PDR Supplier Search report](#) and if you don't see your supplier listed as *enabled* then contact the supplier to complete the registration process or provide different supplier contact information by completing the web form again



Pre-Approved Preparer Role Removal Project

Recent audit findings of the eProcurement (Ariba) system have highlighted potential high-risk audit issues regarding the placing of eProcurement orders without a secondary departmental review. Based on these findings, the Procurement Services Department will be eliminating the Pre-Approved Preparer role for eProcurement orders. In doing so, we hope to close any existing compliance loop holes in the eProcurement system.

What is changing and when?

The Pre-Approved Preparer role is targeted to be removed by September 15, 2015. The role will no longer be available in Astra and no users will be assigned the role as of September 15th.

**Note: This change does not affect the Alcohol Commodity Approver role*

What you need to know:

Contact Us

Newsletter Editor:

djwright@uw.edu

Customer Service:

pcshelp@uw.edu

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- When the Pre-Approved Preparer role is removed, faculty and staff with a UW NetID **will still be able to submit Requisitions or Contract Requests (CRs)**.
- Requisitions or CRs will route to the correct Approver based on the budget number entered in the Requisition
- All Requisitions or CRs in eProcurement (Catalog, Non-Catalog, and BPO) **must be approved by a budget/org Approver**.

To help departments make this transition and better manage eProcurement orders, we will be reaching out to departments to assist with the role removal.

What you need to do:

- Be proactive! Take this opportunity to plan to leverage the new roles to ensure your department is following best practices for purchasing compliance.
- Review Astra to determine which users have the Pre-Approved Preparer role
- Think about what impact the removal of the Pre-Approved Preparer role will have on your department's budget/org Approver and what changes may need to be made in your internal approval processes.

More info:

See additional project details at:

<https://f2.washington.edu/fm/ps/resources/roles/pre-approved-preparer-project>, or contact Procurement Customer Service at pcshelp@uw.edu.



Procurement Services Launches Lean Review of Supplier Onboarding

Representatives from Procurement Services and several campus units gathered in early June to begin a fundamental review of the Supplier Onboarding process.

Led by Tina Schlotfeldt-Padilla (Procurement Services) and facilitated by F2 Lean's Doug Merrill (F2 Lean), the three-day workshop focused on two goals: (1) reducing to two weeks the time from supplier registration to payment and (2) making visible the status of a particular registration/payment within the onboarding process.

The group started by mapping the current, often daunting supplier registration and management process: 133 steps involving up to 8 different constituents, taking from 10 to 28 weeks. Using this map, the group was able to hone in on 10 major issues that reduce efficiency and transparency and to develop ideas for eliminating pain points and moving to a stream-lined, “ideal” workflow.

The 145 ideas generated were in turn organized into six major initiatives (“Kaizens”), each being addressed by subsets of Lean launch members:

1. Integrate Vendor Management Systems (Create a single integrated system)
2. Increase Visibility in New Supplier Onboarding Process
3. Define Roles & Improve Workflow
4. Develop Supplier-Focused Strategy
5. Improve Communications & Training with Stakeholders
6. Address specific, discreet ideas (“Just Do Its”)

The initiative workgroups have developed specific goals for 30-, 60-, and 90-day report outs to executive sponsors and to campus partners. These will be summarized in subsequent issues of the Procurement Services newsletter; further information is also available at the launch website (<http://f2.washington.edu/fm/ps/supplier-onboarding-lean>)

Process Improvement



ProCard Transaction Limit Increase Request Form

New procedure for requesting ProCard transaction limit increase

Why?

The ProCard office is using the Ariba module to utilize its approval flow function to ensure limit increase requests are approved by the authorized department approver(s). This form allows the user to enter all the necessary transaction information needed to process each requests.

When?

The ProCard limit increase form is now available in Ariba. Since July 1st we have been transitioning the limit increase procedure to this new process.

We encourage ProCard users to utilize the form as soon as possible. The ProCard office will no longer accept limit increase requests by email beginning Fall 2015.

How?

1. Go to Ariba Spend Management
2. Click on “Create” – Card Limit Increase”
3. Complete the information
4. “Submit” and you are done!

The screenshot shows the Ariba Spend Management interface for creating a Card Limit Increase. The page title is 'WLI795: Untitled Card Limit Increase'. The navigation bar includes 'Home', 'Contracts', 'Procurement', 'Travel', 'Invoicing', 'Reimbursement', and 'DREBERT'. The main navigation includes 'Create', 'Search', 'Manage', 'Recent', and 'Preferences'. The form is titled 'COMPLETE FORM - CARD LIMIT INCREASE' and contains the following fields:

- Cardholder: CAROLYN D. DREBERT (dropdown)
- Type of Increase: * Single (dropdown)
- Supplier Name: * (text input)
- Item Description: * (text input)
- Single - Total Transaction amount: * (text input) USD
- Budget Number: * (none selected) (dropdown)
- Object Code: * (none selected) (dropdown)
- Department Name: * (text input)

Below the form is a 'COMMENTS - ENTIRE CARD LIMIT INCREASE' section with a text area containing instructions: 'Add a complete description of what is being purchased. If there is a contract to be signed, please "Add Attachment" When completed, click on "Submit" This will be routed to the person in your department who has Procard Approval then onto the appropriate Procard/Buyer for final approval. Once this has been completed an your request approved, an email notification will be sent to the cardholder and approver letting you know to contact the merchant to process the charge.'

At the bottom of the form is an 'ATTACHMENTS - ENTIRE CARD LIMIT INCREASE' section with an 'Add Attachment' button. The form is navigated using 'Prev', 'Submit', and 'Exit' buttons.

What happens next?

Your request is automatically routed to your department’s “Procard Approver” as assigned in ASTRA. When it has been approved, your request is routed to the appropriate buyer/approver for review (if needed).

The ProCard office is automatically notified and we will process your request as soon as possible. You will be notified when the request is approved. The merchant can be contacted to process the amount for payment.

Procurement Tips & Tricks



Pricing Agreements Primer

In general, contracts posted on the [UW Contracts webpage](#) have been competitively bid, and may be used at any dollar amount. However, some agreements are limited to the current [direct buy limit](#) because they were not competitively bid and therefore orders are statutorily limited to the direct buy limit. However, special discounts, terms and conditions have been put in place to benefit customers for these small dollar purchases. Pricing agreements are identified on the supplier list in the UW Contracts webpage by a '#' symbol in the contract number column.

Procurement FAQ's



Are maintenance agreements taxable on an M&E tax exempt order?

Yes, only the equipment will be tax exempt. Maintenance service agreements are still taxable. See taxability grid on the Tax Office webpage at:

<https://f2.washington.edu/fm/tax/netid/taxability>.

Are per diem rates applicable to catering events?

Meals are held to the state required per diem rate. If there are any additional charges, they can be charged to a discretionary funding source only when approved by a Dean or Vice President. Keep a record of the number of attendees of the event. If the cost goes over the per diem rate, also keep a justification of why that supplier was chosen.

Procurement Training



eLearning: Initiating a Subaward via eProcurement

Description: This tutorial provides an introduction to initiating a Subaward in the eProcurement (Ariba) system using the Blanket Purchase Ordering (BPO) functionality.

[Register here for the Initiating a Subaward via eProcurement tutorial](#)

*NOTE: If you are NOT using BPO to initiate subawards and wish to learn about general functionality of the BPO module, then we recommend you view the **Creating a Blanket Purchase Order (BPO)** tutorial instead at: <http://f2.washington.edu/fm/ps/training-events/independent-study/BPO>*

For a step-by-step guide on the eProcurement subaward functionality, refer to the **Requesting Subawards Visual Guide** at: <http://f2.washington.edu/fm/ps/sites/default/files/training-and-events/classroom-training/vis-guide-sub.pdf>

Detailed information about Subawards is available on the **Office of Sponsored Programs (OSP)** website: <http://www.washington.edu/research/index.php?page=subawards>

Green U News



Energy Tips for a Greener Office

UW Sustainability's Green Office Certification Program has tips to make your office more sustainable on the "In Our Nature" blog: <http://green.uw.edu/blog/2015-01/energy-tips-greener-office>

There are some easy steps your office can take to conserve energy and help make UW a more sustainable place. If you're already acting green, get recognized! You can apply for Green Office certification today: <http://green.uw.edu/engage/green-office/application>

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