WELCOME

BOBCATbuyers
Wednesday, January 21, 2015

PLEASE SIGN IN

TEXAS STATE UNIVERSITY
SAN MARCOS
The rising STAR of Texas
AGENDA

Welcome - Jacque Allbright

Procurement & Strategic Sourcing
  ▪ Organizational Chart

Procurement & Strategic Sourcing 2015
  ▪ New Additions for 2015
  ▪ Purchasing Training – 2015
  ▪ P-Card - 2015

Vendor Maintenance Changes

Open Encumbrances

Questions
Procurement and Strategic Sourcing 2015

Welcome to the TSUS Marketplace!

Please contact the Purchasing Office when ordering furniture or equipment.

New Vendors
- Staples Business Interiors
- HBI
- FedEx
- GT Distributors
- SSC Custodial Contract
- Staples Business Interiors

Science Vendors

P-Card

Texas State University
Commercial
0123 4567 8901
2345
Citi
Expiry Date
CMFOZ218
New Additions for 2015

HBI – Hodges Business Interiors
Steelcase Distributors
HUB Vendor

Staples Business Interiors
New Software
HUB Vendor through partnership with Summus

FedEx - Printing
Demo to be held

SSC - Custodial Contract
Part of the Compass Group

GT Distributors – Guns/Ammunition
## SCIENCE 25 LIST

<table>
<thead>
<tr>
<th>Beckman Coulter</th>
<th>G E Healthcare Bio Sciences- Provista</th>
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<tbody>
<tr>
<td>Carolina Biological</td>
<td>Cayman Chemicals</td>
</tr>
<tr>
<td>IDEXX Distribution</td>
<td>Bio Synthesis</td>
</tr>
<tr>
<td>Water Technologies</td>
<td>Viromed</td>
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<tr>
<td>Angrstrom Engineering</td>
<td>Ted Pella</td>
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<tr>
<td>Chemglass</td>
<td>U C Davis Stable Isotope</td>
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<tr>
<td>Integrated DNA</td>
<td>Mountain Home Biological</td>
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<tr>
<td>Kemtech</td>
<td>Superior Economic Medical</td>
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<tr>
<td>McMaster-Carr</td>
<td>R and D Systems</td>
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<td>New England Biolabs</td>
<td>Painted Rock</td>
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<tr>
<td>Qiagen</td>
<td>SJ Technologies</td>
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<tr>
<td>Light Laboratory Systems</td>
<td>Sur Power Battery</td>
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<tr>
<td>Scantron</td>
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Purchasing Training 2015

January 27-28
February 10-11
February 24-25

16 Hours CEU Credits

Registration through Training & Development
Tab through the SAP Portal
I. Welcome & Overview

II. Audit Findings

III. Purchasing at Texas State
   a. Bobcatalog
   b. SAP

IV. P-Card

V. Contracted Services

VI. Major Contracts

VII. HUB Outreach Program

VIII. E-Procurement Hands-On Exercises

IX. SAP Hands-On Exercises

X. Certification Test
Req to Check

**CREATION OF PURCHASE REQUEST**
- Created by Admin or responsible party for ordering goods/services

**GENERATION OF PURCHASE ORDER**
- Created by SAP system (Locals under 5K)
- Created by PSS, SAP or Marketplace

**SUBMITTED TO VENDOR**
- Submitted to vendor by Admin or marketplace

**RECEIPT OF GOODS/SERVICES**
- Received by Central Receiving - GR generated
- Received directly at department - Department completes GR NOTIFICATION
- Picked up by department - Department completes GR NOTIFICATION

**SUBMITTING OF INVOICE**
- Vendor submits invoices directly to Accounts Payable
- Department submits invoice to Accounts Payable

**PAYMENT**
- Accounts Payable pays invoices once confirmation of GR and/or completion of service
- Vendors are paid via direct deposit or check (based on information provided on the VMF)
P-Card 2015
Citi will be migrating to Chip and PIN beginning this month and expected to continue throughout 2015. It will be done in waves.

When you get your Chip card, it will come with an instruction booklet that explains what you must do to activate your new card.

Unlike the old card, you will be prompted to select a 4-digit pin number. This is like your personal debit card.
Searching for a Vendor

Go to ZMK03 and use “Vendor Search Using Address Attributes”

- Search by Name
- Search by Search Term 1
- Search by Search Term 2
- Search by Street Address
SEARCHING FOR AN EMPLOYEE

Vendor 309158 has not been created for purchasing organization 7540

Display Vendor: Initial Screen

Vendor 309158    WILLIS, MARKETA M
PurchasingOrganization 7540 TX State Purchasing
IMPORTANT THINGS TO REMEMBER WHEN SEARCHING

- Except the “,” between the last and first name of an individual, we do not use punctuation in Vendor Setups
- “*” is a Wild card
- Sometimes less is better
- “The” is left off at the start of a name in search term
- Foreign Vendor searches – Remember to change the Country.

Questions on searching for a vendor?
THE LIFE OF A VENDOR NUMBER

- Vendor Request Form is submitted to Purchasing.
- If approved, the vendor is setup and Department is notified by email.
- Vendor is Active until:
  - It goes for 2 years without transactions.
  - There is a problem with a transaction that requires an update.
  - Purchasing or the Vendor withdraws the Vendor.
- If a vendor number is not in the vendor file, it has not been set up or it has been archived and a new Vendor Request form is required.
Changes to Vendor Profile that require a new Vendor Maintenance Request.
- With new Address (Mailing or Remit To).
- New Banking Information (Vendor Direct Deposit Authorization Form).
- Change in Vendor Type
- New Ownership
- New Email Notification for Direct Deposit payments. Only change that can be done with an email.
Vendor Numbers are set up by Vendor Types

<table>
<thead>
<tr>
<th>Range</th>
<th>Description</th>
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<tbody>
<tr>
<td>1 - 99999</td>
<td>Incorporated vendors</td>
</tr>
<tr>
<td>100000 - 199999</td>
<td>State of Texas Agencies &amp; Univ.</td>
</tr>
<tr>
<td>200000 - 299999</td>
<td>Federal Agencies &amp; Institutions</td>
</tr>
<tr>
<td>300000 - 399999</td>
<td>Texas State University Employees (reimbursements)</td>
</tr>
<tr>
<td>400000 - 499999</td>
<td>Third Party Payroll (for payroll use ONLY)</td>
</tr>
<tr>
<td>500000 - 599999</td>
<td>Not Corporate + Dr’s &amp; Attorneys</td>
</tr>
</tbody>
</table>

Incorporated vendors are 1 to 5 digit numbers. All others are 6 digit numbers.
Open Encumbrances

Current Open Encumbrance Report

ZOPEN_ENCUMBRANCE

Current Open Encumbrance Report
Questions
Office: 512-245-2521

Emails:
General Purchasing – purchasing@txstate.edu

Personal Service Contracts – contracts@txstate.edu

Vendor Maintenance – vendorrequests@txstate.edu

Thank you for coming!