

ASU Procurement Process Training

ASU Procurement Department:

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Department of Procurement

CONTACT INFORMATION



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Department of Procurement

Overview

- Common Procurement Terms
- Policies, Regulations, etc.
- What's Required
- Start with National Cooperatives and State Contracts
- Documentation....What's Needed
- Adding New Vendor(s) or Updating Vendor(s) Info
- Procurement Website and Manual
- Wrap Up



Department of Procurement

Common Procurement Terms

1. **After the Fact** – memorandum required when services or products are provided before an authorized purchase order is issued
2. **Competitive Bids** – when a company, organization, or government agency needs goods or services on a large scale, typically a solicitation in the form of a request for proposal (RFP); the competitive bid limit is \$15,000 and public works limit is \$50,000
3. **Contract** – a written agreement, especially one concerning employment, sales, or tenancy, that is intended to be enforceable by law
4. **Emergency Declaration Purchase** – due to certain extreme circumstances, the item(s) must be purchased immediately without following the normal bid rules
5. **Exemption from State Contract** – there is a similar item on the Competitive State Contract, but the item must be purchased from another vendor for specific reasons
6. **National Cooperatives Contract** - is an autonomous association of persons united voluntarily to meet their common economic, social, and cultural needs and aspirations through a jointly-owned and democratically-controlled enterprise
7. **Professional Service** – occupations in the service sector requiring special training such as: architects, engineers, doctors, consultants, lawyers, teachers and accountants
8. **Purchase Order** – the contractual bidding document issued to the Vendor or Contractor by the ASU Procurement Department indicating types, quantities, and agreed prices for products or services.
9. **Requisition** – an electronic order created by the customer or end user laying claim to the use of property, materials or services
10. **Research Approval** – multiple vendors sell product but because of certain circumstances we must buy from a specific vendor
11. **Sole Source** – only one vendor manufactures and sells product
12. **Vendors** - A supplier of goods or services.
13. **Amount Only**- Several Payments are made against one Purchase Order
14. **Open PO** – When the amount of the services or supplies are unknown at the time of purchase



Department of Procurement

Regulations and Policies

- **CODE OF ALABAMA 1975, SECTION 41-16-20:** Competitive Bidding: Contracts for which competitive bidding required; award to preferred vendor
 - (a) With the exception of contracts for public works whose competitive bidding requirements are governed exclusively by Title 39, **ALL** contracts of whatever nature for labor, services, work, or for the purchase or lease of materials, equipment, supplies, other personal property or other nonprofessional services, involving fifteen thousand dollars (**\$15,000**) or more, made by or on behalf of any state department, board, bureau, commission, committee, institution, corporation, authority, or office shall, except as otherwise provided in this article, be let by free and open competitive bidding, on sealed bids, to the lowest responsible bidder unless exceptions Section 41-16-21.
 - (b) A "preferred vendor" shall be a person, firm, or corporation which is granted preference priority



Department of Procurement

What is Considered Public Works

CODE OF ALABAMA 1975, TITLE 39: PUBLIC WORKS

- **PUBLIC WORKS.** The construction, installation, repair, renovation, or maintenance of public buildings, structures, sewers, waterworks, roads, curbs, gutters, side walls, bridges, docks, underpasses, and viaducts as well as any other improvement to be constructed, installed, repaired, renovated, or maintained on public property and to be paid, in whole or in part, with public funds or with financing to be retired with public funds in the form of lease payments or otherwise.



Department of Procurement

Steps to Take.....

Step 1: Department/Customers recognizes a need for a product or service

Step 2: Research Cooperatives & State Contracts to locate product, if product can not be found using these sources then,

Step 3: Vendors are contacted and necessary quotes are obtained (Not expired exact to the amount on the requisition)

Step 4: Department/Customers identifies the supporting documentation that is needed to support this requirement (i.e. VDS, ATF, Second Quote, etc.) and UPLOAD or attach into PeopleSoft.

Please attach all SUPPORTING DOCUMENTATION in PeopleSoft



Department of Procurement

Steps to Take.....

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Department of Procurement

Start with the National Cooperative First

Why start here first..... Cooperative purchasing allows two or more entities to combine their purchasing power and buy through competitively solicited contracts. Co-op contracts can be used to purchase goods and services.

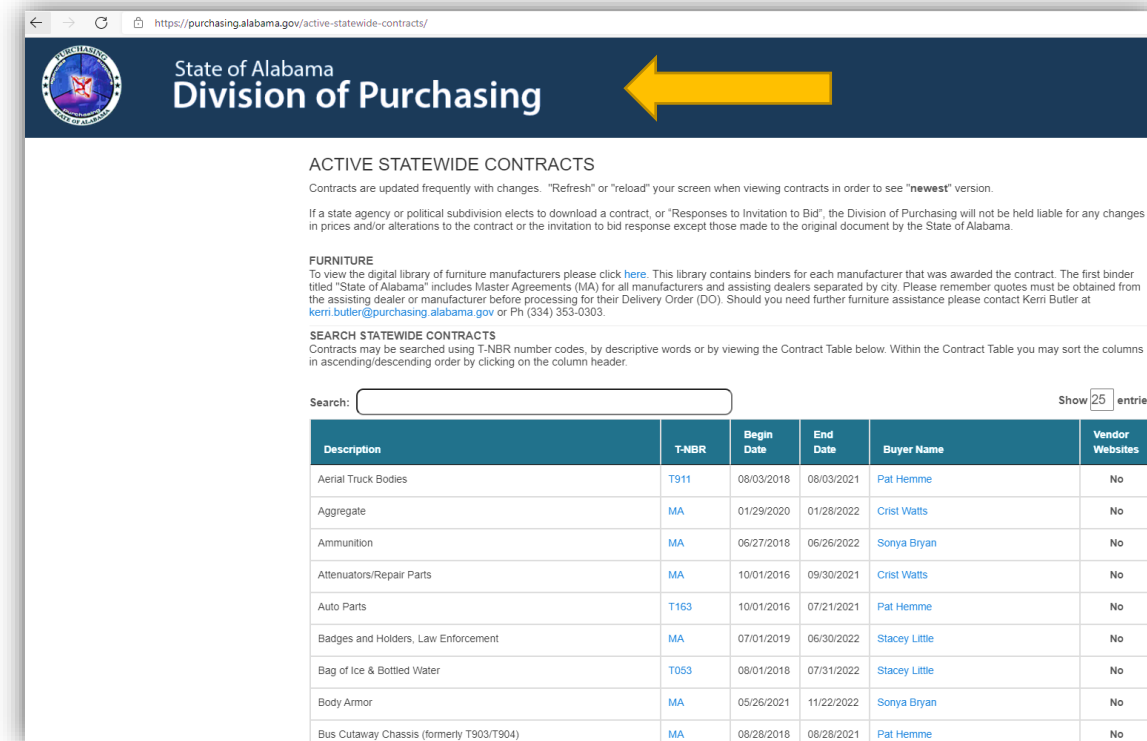
- Lower prices by aggregating purchasing power [buying in higher volume = price savings]
- Lower administrative time
- Obtain more advantageous terms and conditions
 - E&I Cooperative Services - <https://www.eandi.org/>
 - Sourcewell Cooperative Purchasing - <https://www.sourcewell-mn.gov/contract-search>
 - NCPA - <http://www.ncpa.us/>
 - Alabama Community College System (ACCS) - <https://www.accs.edu/vendors>
 - Omnia Partners - <https://www.omniapartners.com/publicsector>
 - PCA Purchasing Cooperatives of America - <https://www.pcamerica.org>



Department of Procurement

State Contracts

- Our ASU customers can purchase goods and services under existing State contracts to reduce duplicative contracting efforts and potentially save time and money, along with other substantial benefits.....
- **Benefits of Using State Contracts**
 - Reduce or eliminate the time required to prepare bid specifications;
 - Enhance and simplify the purchasing process;
 - Minimize the time required to identify responsible vendors;
 - Benefit from the competition of many bidders seeking large volume contracts;
 - Avoid certain controversies that may arise during the competitive bidding process;
 - Reduce the number of bidding documents retained
- **Go to:** <https://purchasing.alabama.gov/active-statewide-contracts/>



State of Alabama
Division of Purchasing

ACTIVE STATEWIDE CONTRACTS

Contracts are updated frequently with changes. "Refresh" or "reload" your screen when viewing contracts in order to see "newest" version.

If a state agency or political subdivision elects to download a contract, or "Responses to Invitation to Bid", the Division of Purchasing will not be held liable for any changes in prices and/or alterations to the contract or the invitation to bid response except those made to the original document by the State of Alabama.

FURNITURE
To view the digital library of furniture manufacturers please click [here](#). This library contains binders for each manufacturer that was awarded the contract. The first binder titled "State of Alabama" includes Master Agreements (MA) for all manufacturers and assisting dealers separated by city. Please remember quotes must be obtained from the assisting dealer or manufacturer before processing for their Delivery Order (DO). Should you need further furniture assistance please contact Kerri Butler at kerri.butler@purchasing.alabama.gov or Ph (334) 353-0303.

SEARCH STATEWIDE CONTRACTS
Contracts may be searched using T-NBR number codes, by descriptive words or by viewing the Contract Table below. Within the Contract Table you may sort the columns in ascending/descending order by clicking on the column header.

Search: Show entries

Description	T-NBR	Begin Date	End Date	Buyer Name	Vendor Websites
Aerial Truck Bodies	T911	08/03/2018	08/03/2021	Pat Hemme	No
Aggregate	MA	01/29/2020	01/28/2022	Crist Watts	No
Ammunition	MA	06/27/2018	06/26/2022	Sonya Bryan	No
Attenuators/Repair Parts	MA	10/01/2016	09/30/2021	Crist Watts	No
Auto Parts	T163	10/01/2016	07/21/2021	Pat Hemme	No
Badges and Holders, Law Enforcement	MA	07/01/2019	06/30/2022	Stacey Little	No
Bag of Ice & Bottled Water	T053	08/01/2018	07/31/2022	Stacey Little	No
Body Armor	MA	05/26/2021	11/22/2022	Sonya Bryan	No
Bus Cutaway Chassis (formerly T903/T904)	MA	08/28/2018	08/28/2021	Pat Hemme	No



Department of Procurement

Steps to Take.....

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Please attach all SUPPORTING DOCUMENTATION in PeopleSoft



Department of Procurement

Steps to Take.....

Step 1: Department/Customers recognizes a need for a product or service

Step 2: Research Cooperatives & State Contracts to locate product, if product can not be found using these sources then,

Step 3: Department/Customers identify the supporting documentation needed to support their requirement (i.e. VDS, ATF, Second Quote, etc.) and **UPLOAD** or **ATTACH** into PeopleSoft.

Step 4: Vendors are contacted and necessary supporting documentation are obtained (Expired Quotes are not valid)

Please attach all SUPPORTING DOCUMENTATION in PeopleSoft



Department of Procurement

Documentation...What's Required?

• For Purchases using General Fund 11

- Using Vendors from National Cooperative
 - Quote with Contract#
 - VDS if over \$5K
- Using Vendors from State Contracts
 - <https://purchasing.alabama.gov/active-statewide-contracts/>
 - Quote with Contract#
- Using Non-Cooperative or Non-State Contracts Vendors (up to \$15K)
 - Quote
 - VDS if over \$5K

• For Purchases using Federal or Restricted Funds 21

- Using Vendors from National Cooperative
 - Quote with Contract#
 - VDS if over \$5K
- Using Vendors from State Contracts
 - <https://purchasing.alabama.gov/active-statewide-contracts/>
 - Quote with Contract#
- Requires 2 or more quotes, except for the following:
 - Sole Source, Bids or Emergency Declarations
 - VDS if over \$5K cumulative for the Fiscal Year (October 1 – September 30)
- Contracts for Public Work over \$2K
 - Requires 2 or more quotes

Please attach all SUPPORTING DOCUMENTATION in PeopleSoft



Department of Procurement

Documentation...What's Required?

- **For Professional Services or Purchases over \$5K**
 - **General Counsel Memorandum**
 - **Executed Contract (with Federal Language if using Restricted Funds)**
 - **Vendor Disclosure Statement (VDS)**
 - ASU VDS (under 5k)
 - The State of Alabama VDS (over 5k)
 - **Letter of Determination (LOD), if applicable(per contract)**
 - A memorandum obtained from AVP of Human Resources (Mr. Carr)
- **Invoices Only**
 - for Registrations, Conferences, Membership/Dues, Licenses, Insurance, or Subscriptions
- **Other Policies/Procedures**
 - **Amount Only**- Several payments are made off one purchase order(amount known)
 - Select “amount only” when creating the requisition
 - **Open Purchase Order**- When the amount of the services or supplies are unknown at the time of purchase
 - When creating the requisition, requisition should read “Supplies Only; No Equipment Purchased” or “Services Only; No Equipment Purchased” –Select “amount only” when creating the requisition
 - **After The Fact (ATF)** - letters are required for services provided or items purchased without an official purchase order, if applicable
 - A memorandum from VP of Business and Finance Office (Mr. Hopper or Ms. Pritchett)



Department of Procurement

How to create a Requisition

- Go to PeopleSoft Main Page,
 - E-Procurement, then Manage Requisition
 - Create New Requisition, then click Special Requests
 - Start Completing the information on Special Request page
 - Item Description
 - Price
 - Quality
 - Category (click on magnifying glass, search by category/description, click find)
 - Unit of Measure
 - Due Date
 - Supplier ID
 - Supplier Name
 - Then click, Add to cart
 - Then click Checkout
 - Add more Comments and Attachments
 - Attach supporting documentations here
 - Check Budget
 - Click Save & Submit

Checkout - Review and Submit

Review the item information and submit the req for approval.

[My Preferences](#) [Requisition Settings](#)

Requisition Summary

Business Unit Alabama State University Requisition Name
*Requester Patricia Thomas Priority
*Currency

Cart Summary: Total Amount 1.00 USD

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	Pens		Lowes Home Center	1.0000	Each	1.0000	1.00		Add	Delete
							Total Amount	1.00 USD		

Shipping Summary

[Edit for All Lines](#)

Ship To Location RECEIVING
Address 1251 S. Decatur St.
Inventory and Receiving
Montgomery, AL 36104
Attention To Patricia Thomas
Comments

Requisition Comments and Attachments

Enter requisition comments

Send to Supplier Show at Receipt Shown at Voucher

[Add more Comments and Attachments](#)

Approval Justification

Enter approval justification for this requisition

[Check Budget](#) [Pre-Check Budget](#)
[Save & submit](#) [Save for Later](#) [Add More Items](#) [Preview Approvals](#)



Department of Procurement

Adding Supporting Documentation To Requisition

- Go to PeopleSoft Main Page,
 - E-Procurement, then Manage Requisition
 - Create New Requisition, then click Special Requests
 - Start Completing the information on Special Request page
 - Item Description
 - Price
 - Quality
 - Category (click on magnifying glass, search by category/description. click find
 - Unit of Measure
 - Due Date
 - Supplier ID
 - Supplier Name
 - Then click, Add to cart
 - Then click Checkout
 - **Add more Comments and Attachments**
 - **Attach supporting documentations here**



Header Comments

Business Unit ALASU

Requisition Date 07/20/2021

Status Open

Comments Find First 1 of 1 Last

Use Standard Comments Entered On:

1

Send to Supplier Show at Receipt Show at Voucher

Add Attachments

OK Cancel



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 - Then click, Add to cart
 - Then click Checkout
 - Add more Comments and Attachments
 - Attach supporting documentations here
 - **Check Budget**
 - **Click Save & Submit**

Checkout - Review and Submit

Review the item information and submit the req for approval.

[My Preferences](#) [Requisition Settings](#)

Requisition Summary

Business Unit Alabama State University
*Requester Patricia Thomas Requisition Name
*Currency Priority

Cart Summary: Total Amount 1.00 USD

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	Pens		Lowes Home Center	1.0000	Each	1.0000	1.00			

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

Total Amount 1.00 USD

Shipping Summary

[Edit for All Lines](#)

Ship To Location RECEIVING
Address 1251 S. Decatur St.
Inventory and Receiving
Montgomery, AL 36104
Attention To Patricia Thomas
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Requisition Comments and Attachments

Enter requisition comments

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Approval Justification

Enter approval justification for this requisition

[Check Budget](#) [Pre-Check Budget](#)
[Save & submit](#) [Save for Later](#) [Add More Items](#) [Preview Approvals](#)



Department of Procurement

Please ensure Email Addresses are included & Triple Check for Accuracy

Adding a New Vendor

- Complete the Vendor Registration Packet
- Have the Vendor provide a completed W-9
- Enter the information into PeopleSoft





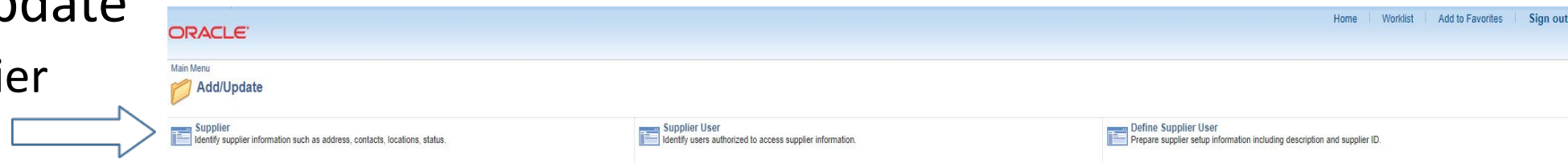

ASU
ALABAMA STATE
UNIVERSITY

Department of Procurement

How to ADD a Vendor into PeopleSoft

Go to PeopleSoft

- Click on Supplier
 - Click on Supplier Information
- Click on Add/Update
 - Click on Supplier



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How to ADD a Vendor into PeopleSoft

- Click on Add a New Value
- Click on Add

The diagram illustrates the process of adding a vendor in PeopleSoft. It shows two stages of the interface:

Stage 1 (Left): A search criteria form titled "Supplier Information". It includes a "Find an Existing Value" button and an "Add a New Value" button. Below these are search criteria fields: SetID (ALASU), Supplier ID (begins with), Persistence (=), Short Supplier Name (begins with), Our Customer Number (begins with), and Supplier Name (begins with). There are also checkboxes for "Include History", "Correct History", and "Case Sensitive". Buttons for "Search", "Clear", "Basic Search", and "Save Search Criteria" are at the bottom.

Stage 2 (Right): A simplified form titled "Supplier Information". It features a "Find an Existing Value" button and a highlighted "Add a New Value" button. The fields are pre-filled: SetID (ALASU), Supplier ID (NEXT), and Persistence (Regular). A highlighted "Add" button is located below the fields.

Blue arrows indicate the flow from the search criteria form to the simplified form, and a large blue arrow points down from the top right of the diagram.



Department of Procurement

How to ADD a Vendor into PeopleSoft

- Click on Identifying Information
 - Supplier Name
 - Supplier Short Name
 - Additional ID Numbers
 - Hit the arrow and it will bring up the Type
 - Standard Industry Code
 - Code(s) selected by vendor on vendor registration form

The screenshot shows the 'Identifying Information' tab of the PeopleSoft Vendor Registration form. A blue arrow points to the 'Identifying Information' tab. Another blue arrow points to the 'Supplier Name' field. A third blue arrow points to the 'Standard Industry Codes' section, which is expanded to show a list of codes. A fourth blue arrow points to the 'Code(s) selected by vendor on vendor registration form' text.

Identifying Information | Address | Contacts | Location | Custom

SetID ALASU
Supplier ID NEXT
*Supplier Short Name
*Classification Outside Party
HCM Class
*Persistence Regular
*Supplier Status Unapproved

*Supplier Name
Additional Name
 Withholding
 Open For Ordering
*Supplier Audit Default
 Supplier Audit

Check for Duplicate

Expand All Collapse All

Supplier Relationships

Corporate Supplier
Corporate SetID ALASU
Corporate Supplier ID NEXT

InterUnit Supplier
InterUnit Supplier ID
Supplier Hierarchy

Create Bill-To Customer
 Create Bill To Customer

Supplier Rating
Supplier Logo
Additional ID Numbers
Duplicate Invoice Settings
Government Classifications
Standard Industry Codes
Additional Reporting Elements
Comments & Attachments

Expand All Collapse All

Save Notify

Add Update/Display Include History Correct History

Identifying Information | Address | Contacts | Location | Custom



Department of Procurement

How to ADD a Vendor into PeopleSoft

- Then click on the magnifying glass under “Type”
 - Select TIN if vendor is a business
 - Select SSN if vendor is an individual
 - Enter the 9-digit ID number
- Select Standard Industry Codes
 - Click on magnifying glass under SIC TYPE
 - SELECT ASU
 - Click on magnifying glass under SIC CODE
 - ENTER SIC CODE(s) that vendors have selected on form
- Scroll back up to the top of the screen



Department of Procurement

How to ADD a Vendor into PeopleSoft

- Click the Address Tab
 - Information Required in this section:
 - Description
 - Address 1
 - City
 - State
 - Postal
 - Email ID
 - Phone Information

The screenshot shows the Oracle PeopleSoft interface for adding a vendor. The 'Address' tab is selected. The form includes the following fields and sections:

- Supplier Information:** SetID (ALASU), Supplier ID (NEXT), Short Supplier Name, and Supplier.
- Supplier Address:** Address ID (1), Description.
- Details:** Effective Date (08/11/2022), Effective Status (Active).
- Country:** USA (United States).
- Address Fields:** Address 1, Address 2, Address 3.
- Location Fields:** City, County, State, Postal.
- Email ID:** A text field for the email address.
- Payment/Withholding Alt Names:** A section for alternative names.
- Phone Information:** A table with columns for *Type, Location, Prefix, Telephone, and Extension.

Blue arrows point to the following fields: Address ID, Description, Address 1, City, State, Postal, and Email ID. The 'Phone Information' section is also visible at the bottom.



Department of Procurement

How to ADD a Vendor into PeopleSoft

- Click the LOCATION tab
 - Type the word “MAIN” in the Location Box
 - Then click SAVE

The screenshot shows the PeopleSoft interface for adding a vendor location. The 'Location' tab is selected, and the 'Location' field is highlighted with a blue arrow. The 'Save' button is also highlighted with a blue arrow.

Identifying Information | Address | Contacts | **Location** | Custom

SetID ALASU
Supplier ID NEXT Short Supplier Name Supplier

A supplier location is a default set of rules which define how you conduct business with a supplier.

Location Find | View All First 1 of 1 Last

*Location Default RTV Fees Attachments (0)

Description

Details Find | View All First 1 of 1 Last

*Effective Date 08/11/2022 Effective Status Active

Expand All Collapse All

Options Payables Procurement Sales/Use Tax 1099

▶ Additional ID Numbers

▶ Comments & Attachments

▶ Internet Address

▶ VAT

Expand All Collapse All

Save Notify Add Update/Display Include History Correct History

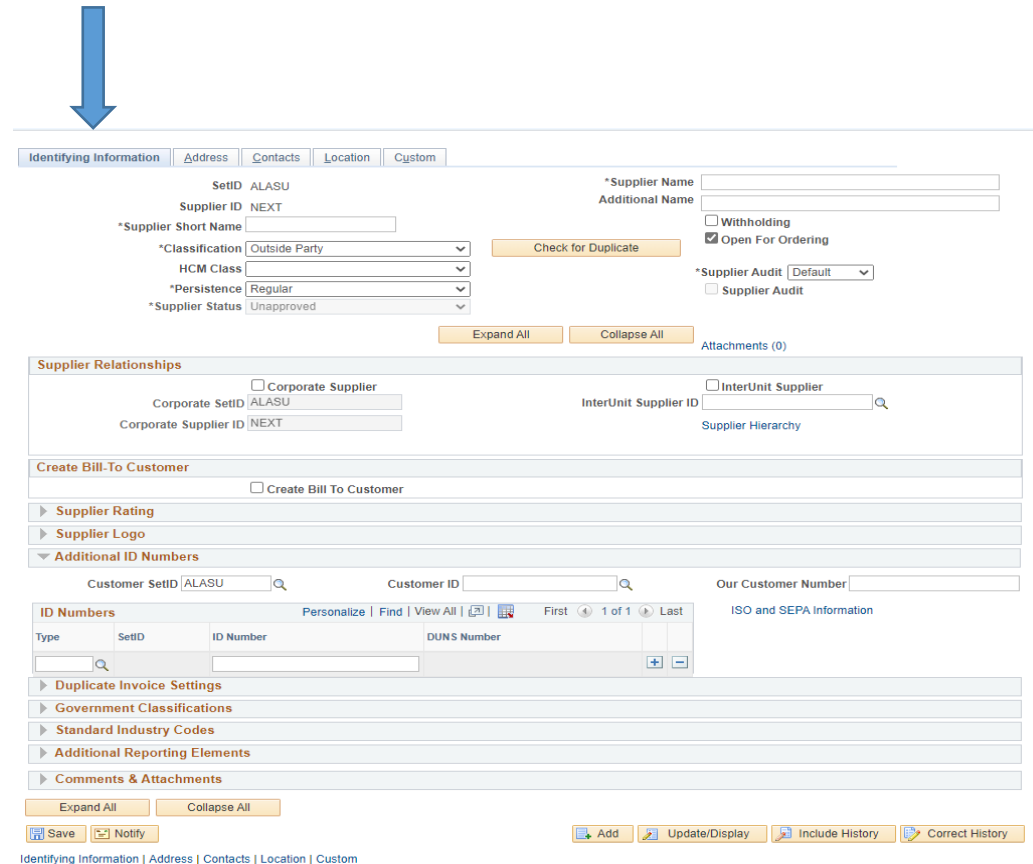
Identifying Information | Address | Contacts | **Location** | Custom



Department of Procurement

How to ADD a Vendor into PeopleSoft

- Scroll back to the Top
 - Click on Identifying Information tab
 - A 10 digit # should appear next to Supplier ID
 - Add number to the New Vendor Form
 - Submit Vendor Form & W9 to Procurement



The screenshot shows the 'Identifying Information' tab of a PeopleSoft Vendor Form. A blue arrow points to the top of the form. The form includes fields for SetID (ALASU), Supplier ID (NEXT), and Supplier Short Name. It also has dropdown menus for Classification (Outside Party), HCM Class, Persistence (Regular), and Supplier Status (Unapproved). There are checkboxes for 'Check for Duplicate', 'Withholding', 'Open For Ordering', and 'Supplier Audit'. The 'Supplier Relationships' section has checkboxes for 'Corporate Supplier' and 'InterUnit Supplier'. The 'Create Bill-To Customer' section has a checkbox for 'Create Bill To Customer'. The 'Supplier Rating' and 'Supplier Logo' sections are collapsed. The 'Additional ID Numbers' section has a table with columns for Type, SetID, ID Number, and DUNS Number. The 'Duplicate Invoice Settings', 'Government Classifications', 'Standard Industry Codes', 'Additional Reporting Elements', and 'Comments & Attachments' sections are also collapsed. At the bottom, there are buttons for 'Expand All', 'Collapse All', 'Save', 'Notify', 'Add', 'Update/Display', 'Include History', and 'Correct History'.



Department of Procurement

Updating Vendor(s) Information

- *When to Use....*
 - updating existing vendor information
- *Ensure all information is included on form:*
 - Address
 - Email
 - TIN or SSN
- *What's New.....*
 - ACH (Direct Deposit) Payment Information
 - Vendor Bank Name
 - Vendor Bank Routing Number
 - Vendor Bank Account Number
 - Account Type (Checking or Savings)
- **Next Step:** Add information into PeopleSoft

UPDATE VENDOR FORM

ALABAMA STATE UNIVERSITY PROCUREMENT DEPARTMENT
1301 West Fifth, Facilities Mgmt. Building, Room 104, Montgomery, AL 36104
Phone: 334-229-4406 - Fax: 334-229-4954
PLEASE EMAIL FORM & REQUIRED ATTACHMENTS TO: Procurement@alasu.edu
CC: Procurement Members

This document is to be filled out by a University Official Only

CIRCLE ONE: ADDRESS CHANGE NAME CHANGE ACH CHANGE REMIT ADDRESS

Vendor Name _____

PeopleSoft Supplier ID _____

Requested By _____ DATE _____

Email _____

PLEASE INDICATE VENDOR TAX CLASSIFICATION BELOW (#1099 TAX REPORTABLE PAYMENTS):

CIRCLE ONE: BUSINESS PROFESSIONAL/INDIVIDUAL

Name _____

TIN/ EIN # _____

SSN # _____

ADDRESS/ REMIT (CHECK "PAYMENT" ADDRESS):

STREET: _____

CITY, STATE, ZIP: _____

TELEPHONE: _____

EMAIL: _____

ACH PAYMENT: Please attach VOIDED CHECK or DIRECT DEPOSIT FORM

Bank Name: _____ Account Type (CIRCLE): CHECKING or SAVINGS

Bank Routing: _____

Bank Account: _____

VENDORS WILL NOT BE APPROVED WITHOUT FEDERAL TAX ID (OR SSN) and A W-9 (W-8) FORM.

Procurement Approver: _____ Date: _____

Please ensure Email Addresses are included & Triple Check for Accuracy



Department of Procurement

Wrap Up

- ✓ Identify the product or service need
- ✓ Check State Contracts and National Cooperatives
- ✓ Upload Supporting Documents
- ✓ Adding or Updating Vendor Information
 - ✓ Include ACH Payment Information
- ✓ Call us if you have any questions



Department of Procurement

QUESTIONS ??????

