



# Contracts & Procurement PURCHASING NEWS

## September 2016

### PEOPLESOFT ePROCUREMENT TROUBLESHOOTING GUIDE!



Contracts & Procurement is pleased to announce the creation of the PeopleSoft Purchasing/eProcurement Troubleshooting Guide! The guide will assist in the most common PeopleSoft issues that have been documented in eProcurement. We've been anxious to have this ready to publish for a long time and hope it is as useful as we anticipate. You may access the guide on our [website](#).



Our gratitude to Antigone Carlson who has been working diligently to make this guide a reality and we are sure requesters and approvers will benefit greatly from all

her efforts! We would also like to thank Tony Jolley for his diligence in logging all of the PeopleSoft issues that came in for the first year and half of going live. His forethought and dedication paved the way for the guide to be developed.

Please feel free to send [Antigone Carlson](#) feedback or suggestions to add solutions to issues that you have discovered that aren't documented.

### DEADLINE TO ENCUMBER 2016 FUNDS



A budget encumbrance is made after a purchase order has been executed identifying the final cost. To ensure there is time to complete competitive solicitation processes in order to encumber 2016 funds, please submit approved requisitions and solicitation documents to Contracts and Procurement by the due dates that follow. Requests received after these dates may not be processed in time for a 2016 budget encumbrance and will be completed after the first of the year.

- **Request for Proposals (RFP) 9/14/16**
- **Request for Bids (RFB, RFC) 10/26/16**
- **Capital Improvement/Construction Bids 10/26/16**

Remember, contracts do not encumber funds, so you must execute and dispatch a purchase order before the end of the year (12/31/16) to encumber 2016 funds.

As in the past, Mayor's Finance will need all 2016 invoices by January 31, 2017 for the payments to be processed as 2016 expenditure. **Please cancel unnecessary PO's and requisitions as soon as possible to release encumbered budget funds.**

Your agency may continue to make small cost purchases using a payment card through the end of the year.

## APPROVED VENDOR LIST CONTRACTS



You may notice that some State contracts now begin with the letters “AV”. These contracts were solicited by use of an approved vendor list and require that users view the contract as a bidding process. This is a result of legislation that was passed in May. Use of “AV” contracts requires a Standard Procurement Process as outlined below:

- ✓ Step 1: County Agencies must review the Approved Vendor List Matrix found on page 2 of the contract summary document.
- ✓ Step 2: From each of the Vendors on the Approved Vendor List that provides the product category needed, County Agencies submit to vendors a scope of work and a cost proposal form.
- ✓ Step 3: County Agencies must use the Request for Quotes, Bids, or Proposal process to evaluate responses from Vendors.
- ✓ Step 4: Per Utah Procurement Code, after the award, County Agencies will make a tabulation available for public inspection.
- ✓ Step 5: County Agencies will keep all documents in a file for auditing purposes.

If your agency has any questions about this new process please contact [Sharon Pierce](#). If you have specific questions about a particular “AV” contract please refer to the Buyer of the State contract.



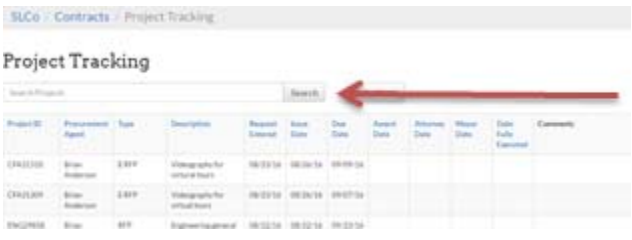
## HOW TO KEEP PEOPLESOFT HCM AND FINANCE OPEN AT THE SAME TIME

If you have a position that requires you to use both PeopleSoft HCM and Finance, it can be extremely frustrating when you log in to one and it kicks you out of the other. You can avoid this headache by using different browsers to open up each site.

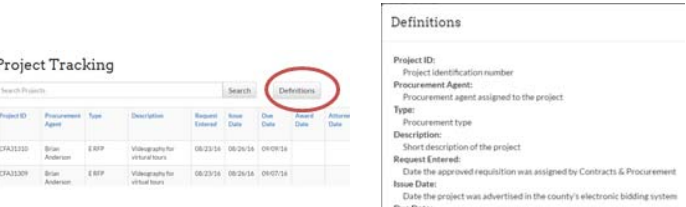


## HOW TO USE THE NEW PROCUREMENT PROJECT TRACKING TOOL

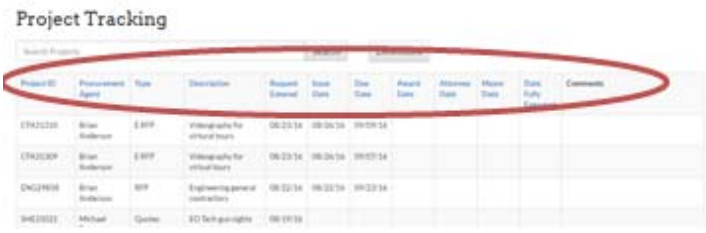
Last month Contracts and Procurement published a new [tool](#) for County Agencies to track procurement projects throughout the process. As a follow up, we’d like to highlight some functions within the tool. If you are looking for a specific project but do not know the Project ID, you may enter keywords/phrases into the search function:



You may also explore what each of the categories within the tracking tool mean by clicking on the “Definitions” button:



Also, you are able to sort by any one or several of the fields by clicking on the column header title:



We believe that this tool will be very useful in helping to communicate to County Agencies the current status of their procurement projects. If you have any questions or feedback about this new tool please feel free to [contact us](#).



## STATE COOPERATIVE CONTRACT: HELP DESK

The Division of State Purchasing has announced the addition of a State Cooperative Contract Help Desk. The Help Desk will provide the following search services:

- Help locating a best value cooperative contract or vendor
- Assist in identifying a product or service available through a best value cooperative contract
- Provide instructions about contacting vendors
- Supply information on how to purchase from the best value cooperative contracts

To use the State Cooperative Contract Help Desk, please contact Sheila Bird at 801.538-3154 or [sbird@utah.gov](mailto:sbird@utah.gov)

## CUSTOMER SERVICE SURVEY



Contracts and Procurement will be sending out our annual internal customer service survey next month. This survey helps us gather valuable feedback needed to understand how we are doing and what areas we may improve upon. We strive to improve processes and our customer service and this survey is essential in measuring the success of our efforts. Please take a moment to offer your comments and suggestions.



## PURCHASING CARD TRAINING WEDNESDAY, SEPTEMBER 21 11:00 AM – 12:00 NOON

Come learn about the benefits of using a purchasing card for small cost purchases. If you have submitted an [application](#), you will need to attend training before a card will be issued. Please RSVP to [Cynthia Carrington](#) to reserve a spot in the classroom.

**The September P-Card Statement closes on September 22<sup>rd</sup>. All approvals and reallocations need to be completed by Friday, September 30<sup>th</sup>.**



## REMINDER: PURCHASING CARD PAPER STATEMENTS ARE SUPPRESSED

As a reminder, all purchasing card paper statements have been suppressed for all cardholders. This was a green initiative put into place the end of 2015. If you would like a copy of your statement you may log in to Access Online and go to Account Information>Statement and download the statement pdf file. If you have any questions please contact [Angelina Harward](#).

# CONTRACT UPDATES

Visit our [WEBSITE](#) for a complete list of countywide contracts

## NEW COUNTYWIDE CONTRACTS

Contract #	Vendor	Description	Expiration:
AR608	ARUBA NETWORKS, INC.	Communication Equipment	5/31/2019
PA2213-1	INFORMATION TECHNOLOGY CORE	CW - Computer Equipment & Svcs	3/31/2017
AR2271	SABA SOFTWARE, INC.	CW learning mgmt system	11/30/2022
MA2399	KDH DEFENSE SYSTEMS, INC	Body Armor (NASPO)	3/15/2018
MA310-1	MCKESSON MEDICAL-SURGICAL	CW MED,HOSPITAL,PERSONAL ITEMS	7/31/2017
PD2431	BOB BARKER CO	CW - White Bra	9/3/2019
PD2459	VICTORY SUPPLY	CW - Bed Linens, Pillows, Blkt	7/31/2021

## RENEWED OR EXTENDED COUNTYWIDE CONTRACTS

Contract #	Vendor	Description	Extended to
MA310-1	McKesson	Medical and Personal Care Items	7/31/2017

## EXPIRING COUNTYWIDE CONTRACTS

IF YOUR AGENCY UTILIZES AN EXPIRING CONTRACT, PLEASE CONTACT CONTRACTS & PROCUREMENT FOR AN UPDATE.

Contract	Vendor	Description	Expiration	Additional Info
MA1636	CINTAS FIRST AID	CZ First Aid Supplies	9/30/2016	MA1636
MA119	WASATCH FIRST AID	CZ - Vehicle First Aid Kits	9/30/2016	MA119
CW12102C	BUSINESS CLEANING	CW - Window Washing Services	9/19/2016	CW12102C
LI12299C	An Exquisite Affair	CZ Catering at the Viridian	9/30/2016	LI12299C
LI12302C	HAVE PARTY WILL	CZ Catering at the Viridian	9/30/2016	LI12302C
LI12303C	LE CROISSANT	CW Catering at the Viridian	9/30/2016	LI12303C
LI12304C	UTAH FOOD	CW Catering at the Viridian	9/30/2016	LI12304C

LI12305C	CUISINE UNLIMITED	CW Catering at the Viridian	9/30/2016	LI12305C
LI12306C	CULINARY CRAFTS	CW Catering at the Viridian	9/30/2016	LI12306C
CZ13108C	CAL BROWN BODY	CZ LIGHT DUTY TOWING	9/5/2016	CZ13108C
CZ13109C	ADVANCED TOWING	CZ LIGHT DUTY TOWING	9/5/2016	CZ13109C
AR076	ENVIRONMENTAL	CW ESRI software licensing	9/30/2016	AR076
MA1636	CINTAS FIRST AID	CZ First Aid Supplies	9/30/2016	MA1636

Contract information is available on the [Purchasing Website](#). (Click "Contract Information" & "Current Contracts").

State contracts can be viewed at: [www.purchasing.utah.gov](http://www.purchasing.utah.gov)

**Suggestions? We would love to hear them!**

If you have any requests, ideas, questions, suggestions, and/or comments about the newsletter, please contact [Angelina Harward](#)