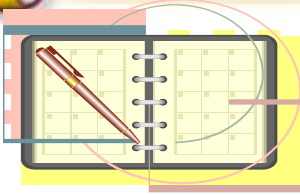


SAP Update and Refresher Session



Rev: 2/16/12



New

1. Material Groups
2. Workflow
3. Portal transition – PR creation/approval
4. Special approvals/thresholds

AGENDA

Other

1. Fiscal/GL review
2. Accounts Payable
3. Website revisions
4. Pcard
5. Annuitants

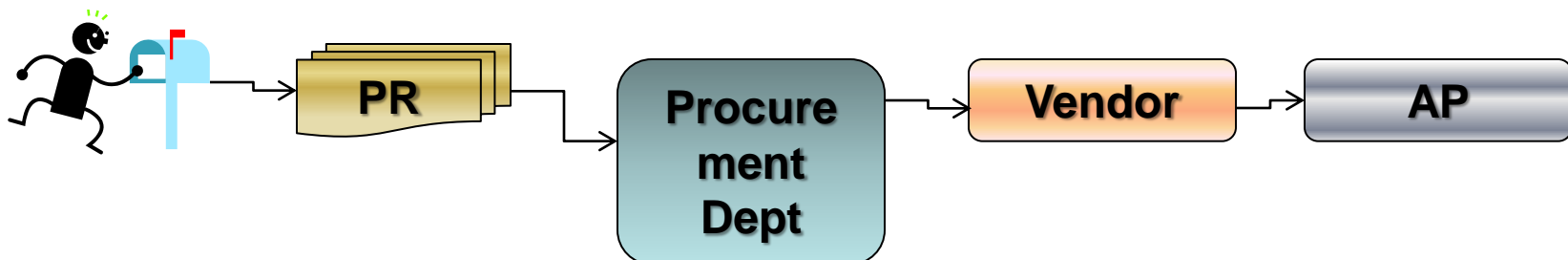
Refresher

- | | |
|---|---|
| 1. Use of required date | 10. No charge items |
| 2. Item descriptions | 11. Discounts |
| 3. Status tab | 12. PO's that cross FY's |
| 4. Split account assignments | 13. Attachments |
| 5. Use of personal lists – ex. vendors, material groups | 14. Service Purchase Outline Agreements |
| 6. Vendor look-up | 15. Cycle times |
| 7. Copying PR lines | |
| 8. ZM08 – partnered vendors | Appendix A – Material Groups with Special Approvers |
| 9. GL assignment/review | |

Background

Currently all purchase requisitions (PR's) route directly to Procurement for assignment without review of:

- Proposed expenditure
- Approval of \$ value
- Routing/review by “special approvers”/functional areas; i.e. IT
- Selection of applicable/best matching material group



Material Groups

- To date, Purchase Req material groups created with Office Supply # (00148) as default
- Procurement changes to “true” material group at time of PO creation.

Change:

- ✓ Requisitioner should select the most appropriate matching material group at time of PR creation.
 - ❖ The list of material group choices can be found by using the drop-down menu when creating a PR.
 - ❖ Provides for 110 choices
 - ❖ The list can be customized by user to reduce to those frequently used

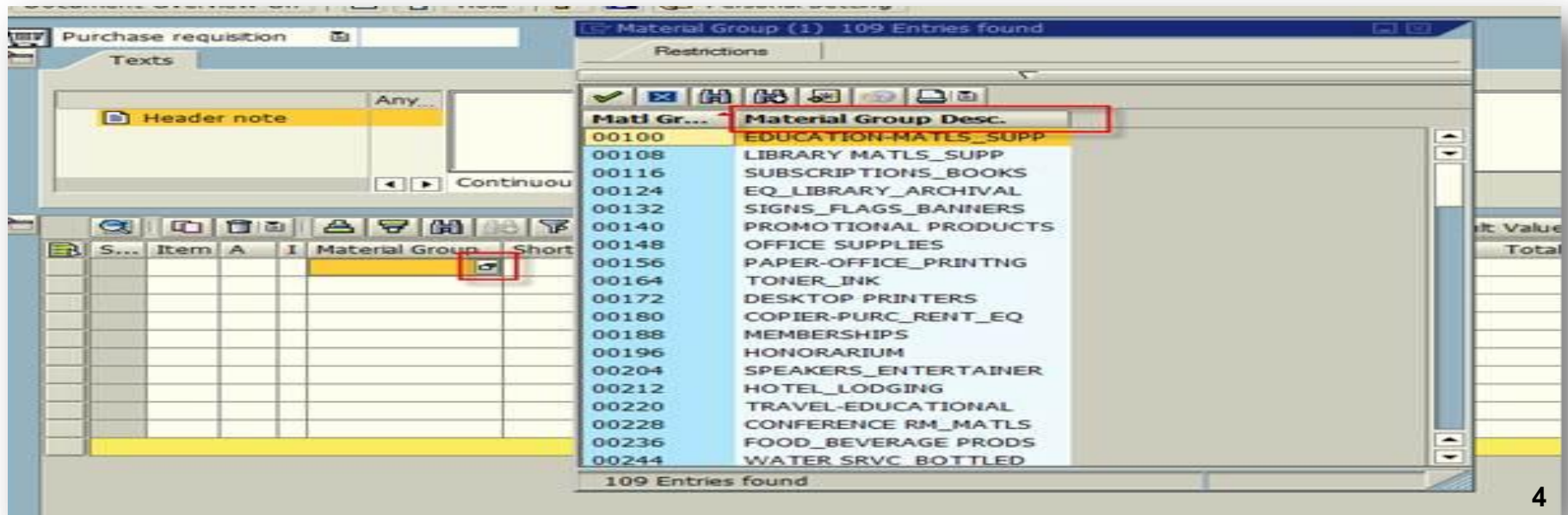


Material Groups cont'd

When creating requisition (transaction ME51N), no longer default office supplies (00148) as the material group for each requisition line.

Click on the drop down menu (see below) and select the correct material group for each requisition line according to what you are buying.

List automatically sorts by the material group #, however by clicking on the description heading (see below) the list will sort by the description.



The screenshot shows the SAP ME51N transaction interface. On the left, the 'Purchase requisition' header is visible. Below it, the 'Texts' tab is active, showing a 'Header note' field. The main area displays a table with columns: S..., Item, A, I, Material Group, and Short. A red box highlights the 'Material Group' column header. To the right, a dropdown menu is open, showing a list of material groups. The dropdown has two tabs: 'Matl Gr...' and 'Material Group Desc.'. The 'Material Group Desc.' tab is selected, and a red box highlights the 'Material Group Desc.' header. The list of material groups is sorted by description. The list includes:

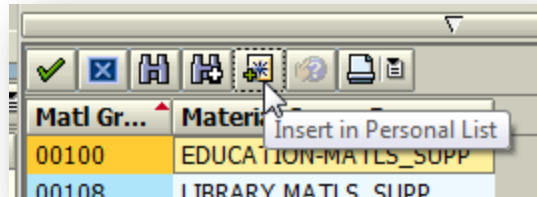
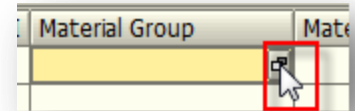
Matl Gr...	Material Group Desc.
00100	EDUCATION-MATLS_SUPP
00108	LIBRARY MATLS_SUPP
00116	SUBSCRIPTIONS_BOOKS
00124	EQ_LIBRARY_ARCHIVAL
00132	SIGNS_FLAGS_BANNERS
00140	PROMOTIONAL PRODUCTS
00148	OFFICE SUPPLIES
00156	PAPER-OFFICE_PRINTING
00164	TONER_INK
00172	DESKTOP PRINTERS
00180	COPIER-PURC_RENT_EQ
00188	MEMBERSHIPS
00196	HONORARIUM
00204	SPEAKERS_ENTERTAINER
00212	HOTEL_LODGING
00220	TRAVEL-EDUCATIONAL
00228	CONFERENCE RM_MATLS
00236	FOOD_BEVERAGE PRODS
00244	WATER SRVC BOTTLED

The bottom of the dropdown shows '109 Entries found'.

Material Groups cont'd

If same set of material groups are used frequently, users can create personal material group list with only groups utilized as follows:

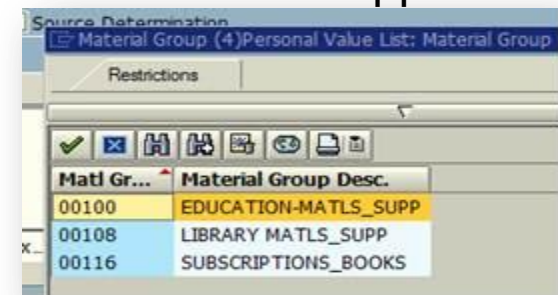
1. Click on the drop down menu for material groups:
2. Highlight the material group and click on “Insert in Personal List”:



3. Add each material group as desired. When finished click on the “Personal Value List” icon to see new list:



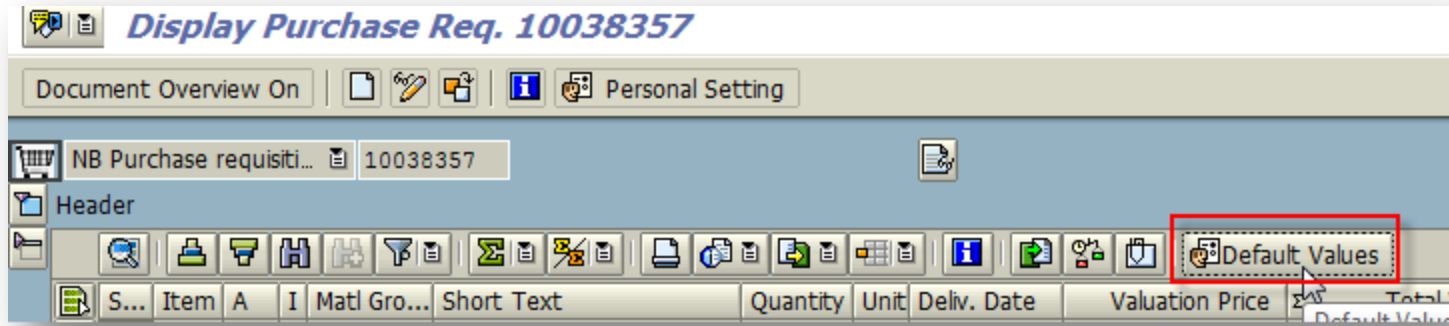
4. Example of material groups in this users' personal list that will now appear each time the user searches for a material group:



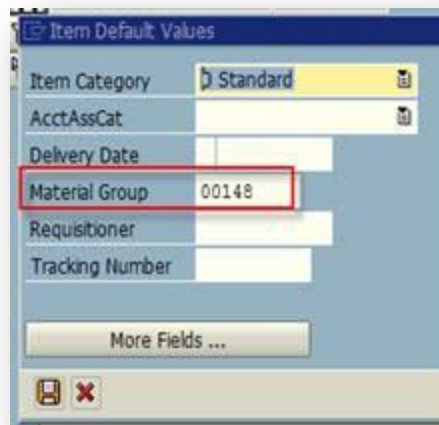
Material Groups cont'd

To remove any existing material group default settings:

1. Transaction ME53N – click on the “Default Values” button



2. If there is an existing default set for material group, users will see a value maintained as shown in the first screen shot. Remove the value and click “Save” to no longer have the material group default.



Proposed Special Approvers

Item or Service	Additional Approval by:
Computer Hardware / Software	Information Technology
Subscription / Memberships	Library Director (<i>still under discussion</i>)
Hazardous Materials or Related Services	Environmental Health & Safety Office
Publication and Communications - Use of Logo, Seals, etc.	Communications Office
Grants and Sponsored Research	Restricted Funds Office (Grant Accountant)

- PR's would route to Special Approvers after department approval, if required based on \$ value.

Proposed Approval Thresholds

<u>Purchase Req Value</u>	<u>Approver</u>
<\$5,000	Requisitioner
>\$5,000	Dean/VP

* Note: Approval threshold based on line item total. Different lines on PR could be charged to different Depts. (Funds Centers) and require different approvers/Special Approvers.

- 7.2% of PR's in past FY \geq \$5,000
- 3.5% of PR's \geq \$10,000

Review of major expenditures without burden of routine PR's

Portal PR Approval - Example

- Example: 10SMITH is Science Dept Chairperson and needs to approve all PR's >\$5,000 for Fund Centers 111111111 and 222222222. Science Dept assigned release code (P1). 10SMITH would also like 10MILLER to approve these PR's while he is out.
 - ❖ *10SMITH and 10MILLER must both be assigned the SAP security role to approve requisitions with release code (P1) in order to start approving.*
- 10SMITH assigned as workflow person for this release code (P1), will receive msg in university email inbox.

After logging into ESS Portal, click the Materials Management tab circled.



Portal PR Approval - Example cont'd

A second line of tabs may appear. Click the Purchase Requisition Approval tab.



The portal screen will show a list of requisitions waiting for approval. As noted on the screen image below, to display a requisition, select it by clicking on the line then click the **Display Inbox Item** button

Purchase Requisition System - Requisition Approval

This page will show you a listing of all purchase requisitions awaiting your approval in your SAP business inbox. Start by selecting an item from the list.

If you need to open a purchase requisition that is not in your inbox use this link:

**Select an inbox item by clicking on it,
Then click the 'Display Inbox item' button (circled).**

Purchase Requisitions Awaiting Processing	
Display Inbox Item	Refresh Inbox
Approval Requested	Task Description
11/30/2010	Requisition release 10058050 00001
11/30/2010	Requisition release 10058050 00002
11/30/2010	Requisition release 10058050 00003
11/30/2010	Requisition release 10058050 00004

Portal PR Approval - Example cont'd

Click one of the pencil icons (circled) in the lower section of the screen to release the PR. Click the **Return to Business Inbox** button (also circled) when finished with this req.

Release Purchase Req. 0010058050

Header Note:

Item text is shown on the Item Details tab

This is sample Header text from the requisition. This text is available for review during the approval process.

Items for Approval								
Item No.	Short Text	Quantity	Line Amount	Unit	Total Amt	Delivery Date	Status	
00001	Sample Req- Portal Approval	14	\$1.50	EA	\$21.00	12/1/2010	Awaiting Release	
00002	Sample Req Line 2	10	\$1.00	EA	\$10.00	12/1/2010	Awaiting Release	
00003	Sample Req Line 3	12	\$2.00	EA	\$24.00	12/1/2010	Awaiting Release	

Item Details
Account Assignment(s)
Release Strategy
Attached Documents

Code	Description	Person Responsible	Status	Release	Release All
AC	Accounting - ALL	90JAFERGUSON	!		
PC	Sr Exec Asst Provost	90EPFISTER			
V1	Provst/VP AcadmAffrs	AMULLA			

Reject Item

Header Note from the req

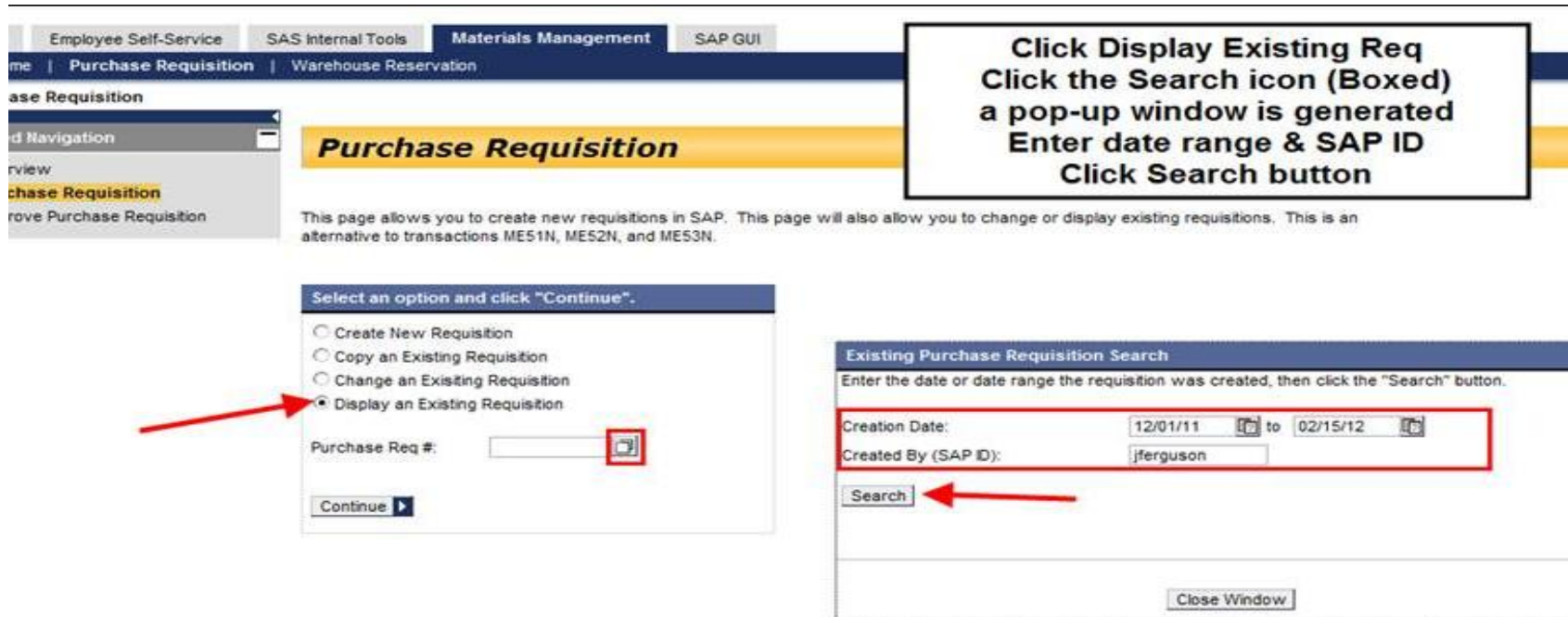
The Attached Documents tab appears ONLY if there are attachments

 Click the pencil in the "Release" column to approve this line on the req
 Click the pencil in the "Release All" column to approve ALL lines on the req

Return to Business Inbox

Portal PR Approval - cont'd

- Once approved by designated approver (if required) the requisitioner receives an the approval message in the SAP inbox (transaction SBWP), but it is NOT forwarded to university email
 - ❖ This happens whether PR is created and/or approved through the portal or SAP
- Requisitioners can view a history of previously created PR's



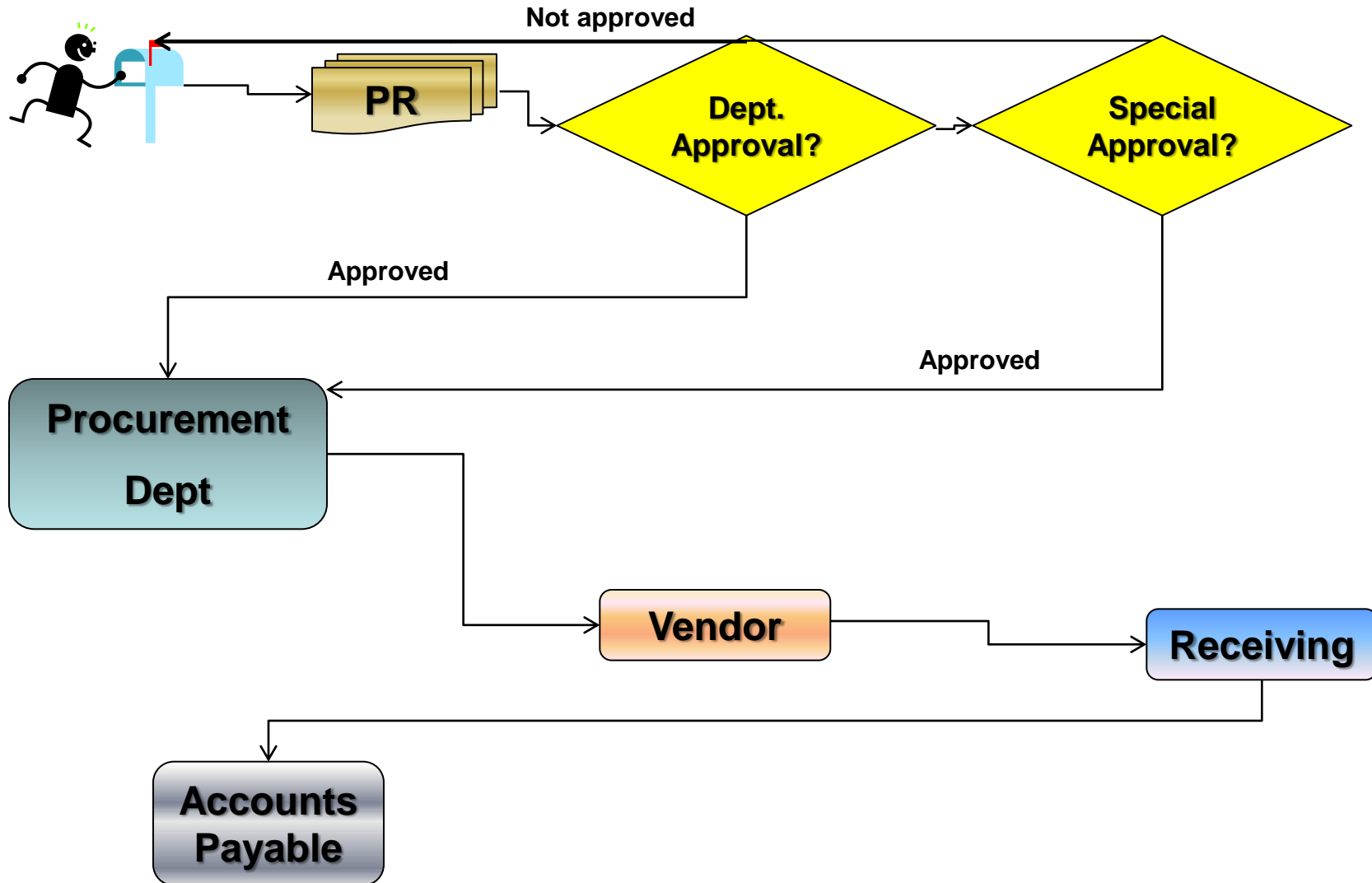
The screenshot shows the SAP Purchase Requisition portal. At the top, there are tabs for Employee Self-Service, SAS Internal Tools, Materials Management, and SAP GUI. The main heading is "Purchase Requisition". Below this, a text box states: "This page allows you to create new requisitions in SAP. This page will also allow you to change or display existing requisitions. This is an alternative to transactions ME51N, ME52N, and ME53N."

On the left, there is a sidebar with a "Navigation" menu. The "Purchase Requisition" option is highlighted. A red arrow points to the "Display an Existing Requisition" option in the "Select an option and click 'Continue'." section. Below this, there is a "Purchase Req #" field with a search icon (a magnifying glass) next to it, which is also highlighted with a red box and a red arrow.

On the right, there is a callout box with the following text: "Click Display Existing Req. Click the Search icon (Boxed) a pop-up window is generated. Enter date range & SAP ID. Click Search button".

Below the callout box, there is a "Existing Purchase Requisition Search" pop-up window. It contains the following fields: "Creation Date:" with a date range from 12/01/11 to 02/15/12, and "Created By (SAP ID):" with the value jferguson. A red box highlights these fields. Below the fields is a "Search" button, which is also highlighted with a red box and a red arrow. At the bottom right of the pop-up window is a "Close Window" button.

New Process



Business Case

- Best practice used by nearly all PASSHE universities
- Internal audit/controls:
 - ❖ Lack of budgetary and fiscal review
 - ❖ Provides audit trail of approvals
- PASSHE budget constraints require tighter scrutiny of expenditures
- Drives budget responsibility to budget “owners”
- Facilitates spend reporting=>sourcing opportunities ID'd



Next Steps

1. Obtain consensus on Special Approvals:
 - IT
 - Print/Media
 - Other – TBD
2. Configure Dept. \$ approval hierarchy
3. Assign security roles
4. Roll out University wide

#’s 1 and 2 discussed. Will send communication when ready to be deployed



Portal PR Creation

- New feature on the portal – Create, Change, and Display a Requisition.
 - ✓ Piloted and tested with many users from several PASSHE universities
 - ❖ *Counterman and Beishline at BU*
 - ✓ All current BU requisitioners have been provided this capability by SAP Support Team.
 - ✓ Requisitioners require a role (Z:xx:MM:RQSTNR) (xx = plant) in SAP to use this feature.
- What are the benefits of using the portal vs. SAP R/3?
 - ✓ Easier navigation and easier to follow
 - ✓ Only the fields you need are on the screen
 - ✓ Limited values to choose from in drop down lists (i.e. UOM)
 - ✓ Can access the link anywhere you have internet access and do not need the SAP gui launch pad on the PC.
 - ✓ Do not always have to use the portal. An optional way to create, change and display a requisition. Always have both options (portal and SAP R/3) available.

Portal PR Creation cont'd

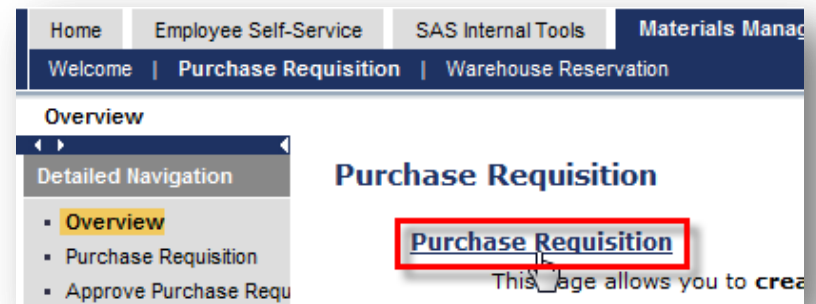
Logon to the ESS Portal website: <https://portal.passhe.edu>

Click on the “Materials Management” tab as shown below:



Note: The ESS portal screen above will vary user to user based on SAP/Portal authorizations. If the “Materials Management” tab is not displayed, contact the Procurement Department.

Click on “Purchase Requisition” links as shown below and proceed:



Portal PR Creation cont'd

Notes: Attachments can be added in create/change. If in create, you must save the requisition first and then select a line to get the attachment tab to appear.



Purchase Req # (Assigned by SAP): 0010362281

Header Note:

Line	Short Text	Delivery Date	Quantity
1	Testing PR Attachments	12/31/2012	

Add New Line

Line Details

General Account Assignment Texts Release and Status Delivery Address **Attachments**

The are no documents attached to this requisition.

Attach New Document

Copy Line to New Line Edit Selected Item Delete Selected Item



Attach Document to Requisition

This feature will allow you to attach a document to this requisition that will be accessible by anyone who views this requisition. Enter the path of the file to attach, or use the browse button, then click the "Attach" button.

File to Upload: C:\Users\90thager\Desktop\SAPtable Browse...

Attach File to Requisition Cancel Adding Attachment

- Once saved on the portal, the requisition is immediately created in SAP.
- The portal uses the same security roles assigned in SAP.
- When creating a new requisition, you will not see the release strategy tab (if applicable) until you save the line.
- The portal will pull in defaults or "parameter ids" for the requisition.
- For a multiple line requisition, select the appropriate line to see the line item details.

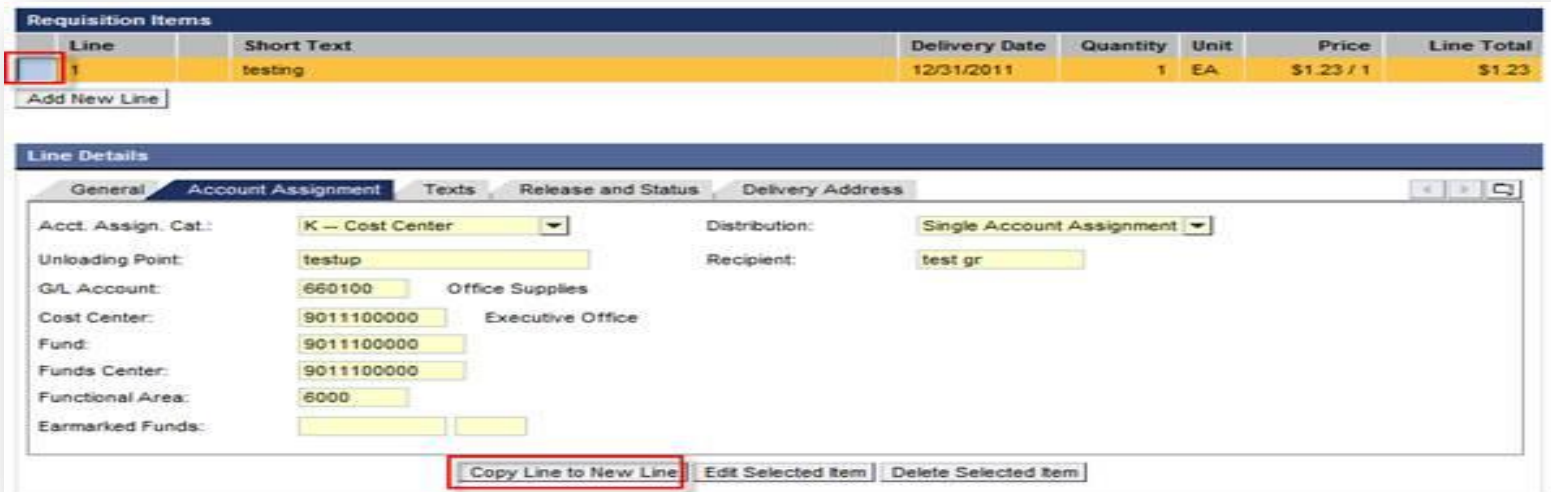


Line	Short Text
1	Testing

Add New Line

Portal PR Creation cont'd

- Copying lines - Create the first line and “save item” to the requisition. When selecting the line (see red box), provided with the “Copy Line to New Line”:



Line	Short Text	Delivery Date	Quantity	Unit	Price	Line Total
1	testing	12/31/2011	1	EA	\$1.23 / 1	\$1.23

Line Details

General Account Assignment Texts Release and Status Delivery Address

Acct. Assign. Cat.: K — Cost Center Distribution: Single Account Assignment

Unloading Point: testup Recipient: test gr

G/L Account: 660100 Office Supplies

Cost Center: 9011100000 Executive Office

Fund: 9011100000

Funds Center: 9011100000

Functional Area: 6000

Earmarked Funds:

Copy Line to New Line Edit Selected Item Delete Selected Item

Note: At this time, can only copy one line at a time. Cannot select 4 lines and create 4 new lines as in SAP.

Copying brings everything from line 1 to the “new line” and changes can be made before “saving” the line to the requisition. Below the short text, quantity and price were changed.

Requisition Items								
	Line		Short Text	Delivery Date	Quantity	Unit	Price	Line Total
	1		testing	12/31/2011	1	EA	\$1.23 / 1	\$1.23
	2		testing - copy of line 1	12/31/2011	2	EA	\$2.44 / 1	\$4.88
Total Purchase Requisition Price: \$6.11								

Portal PR Creation cont'd

Copying a PR - Have capability to create a new requisition by copying an existing requisition:

Select “Copy an Existing Requisition” and enter the requisition number or search if not known.



The screenshot shows the 'Purchase Requisition' portal interface. At the top, there is a yellow header with the title 'Purchase Requisition'. Below the header, a blue bar contains the text 'Select an option and click "Continue".'. The main content area has four radio button options: 'Create New Requisition', 'Copy an Existing Requisition' (which is selected and highlighted with a red box), 'Change an Existing Requisition', and 'Display an Existing Requisition'. Below these options, there is a text label 'Purchase Req #' followed by a text input field (also highlighted with a red box) and a small magnifying glass icon. At the bottom left, there is a 'Continue' button with a right-pointing arrow.

Multiple Account Assignment: Able to create a requisition with multiple account assignment or even mixed (using the X). In change mode, cannot change a single account assignment to a multiple account assignment on the portal.

Portal PR Creation (Roles and Questions)

Any user with the SAP role = Z:10:MM:RQSTNR now has access to “Create a Requisition” on the portal. FAQ:

- What if a user does not have the MM Tab?

Ask IT Department to add that user (SAP Id) to Active Directory Folder: BUP-WEB-MM-REQUISITIONERS.

- What if a user gets a message they are not authorized to use this transaction?

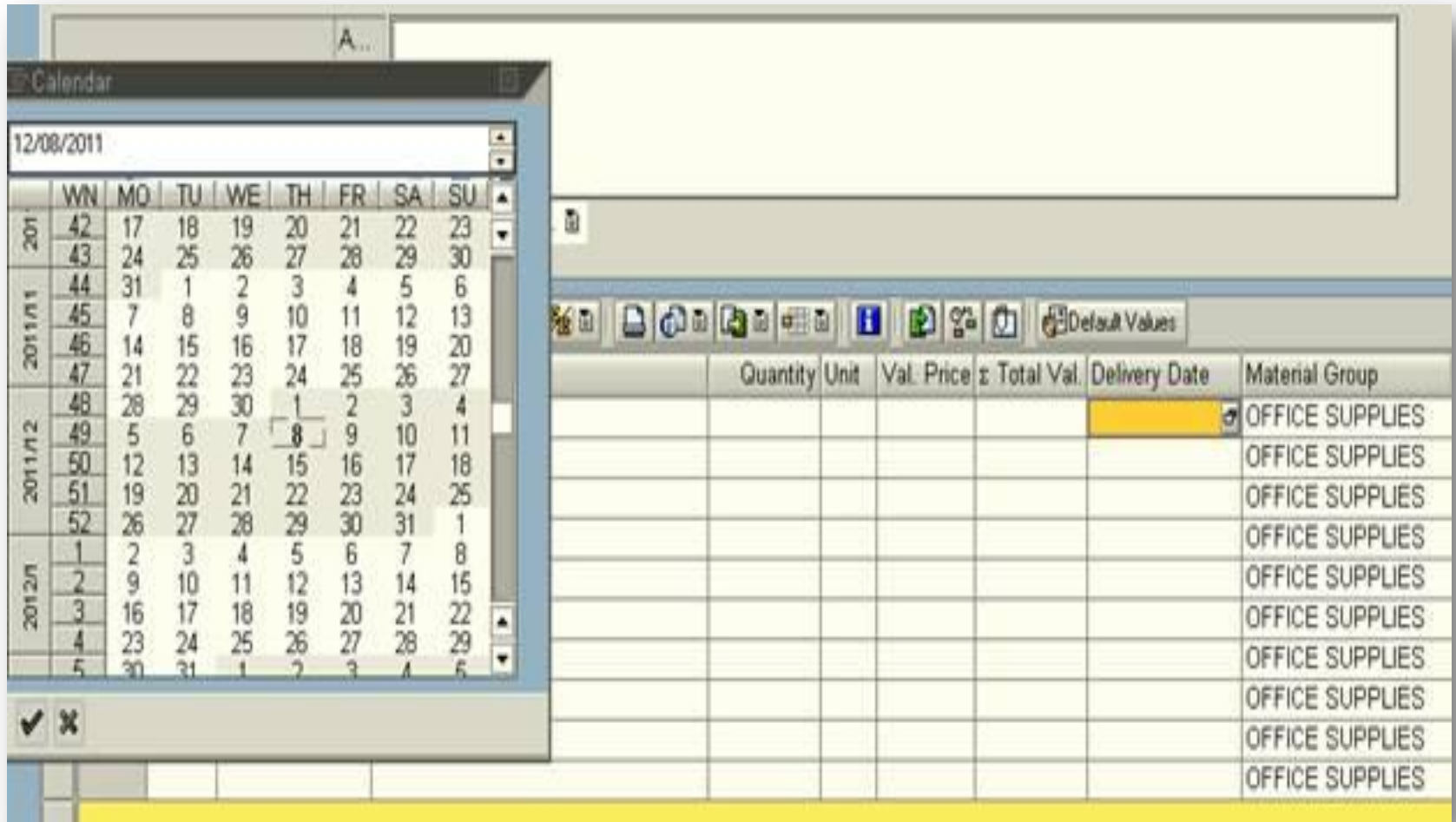
Check with security team to make sure they have the SAP role - Z:10:MM:RQSTNR.

- How does a new user get added to the appropriate portal folder?

When BU security team adds a user to the SAP role - Z:10:MM:RQSTNR, they should be added to the AD folder - BUP-WEB-MM-REQUISITIONERS as well.

Refresher

- Delivery Dates - When creating PR's please enter the actual date of need vs. an arbitrary # of days; i.e.30.



The screenshot shows a software interface with a calendar window and a table of office supplies.

Calendar Window:

- Title: Calendar
- Date: 12/08/2011
- Days of the week: WN, MO, TU, WE, TH, FR, SA, SU
- Months: 2011, 2011/1, 2011/2, 2012
- Days: 1 through 31

Table:

Quantity	Unit	Val. Price	Total Val.	Delivery Date	Material Group
					OFFICE SUPPLIES
					OFFICE SUPPLIES
					OFFICE SUPPLIES
					OFFICE SUPPLIES
					OFFICE SUPPLIES
					OFFICE SUPPLIES
					OFFICE SUPPLIES
					OFFICE SUPPLIES
					OFFICE SUPPLIES
					OFFICE SUPPLIES

- Item Descriptions - Noun/adjective syntax easier to understand and search. Also include any/all relevant supplier part #'s

- Status - Requisitioners can ascertain status of key activities by reviewing the Status tab.

Status	Item	Desired Vendor	Short Text	Quantity	Unit	Val. Price	Total Val.	Delivery Date	Material Group
	1	1000045	Door Inactive leaf, Rotary white Bi...	1	EA	660.00	660.00	12/09/2011	OFFICE SUPP
							- 660.00		

Item: [1] Door Inactive leaf, Rotary white Birch

Quantities/Dates | Valuation | Account Assignment | Source of Supply | Status | Contact Person | Release strategy | Te

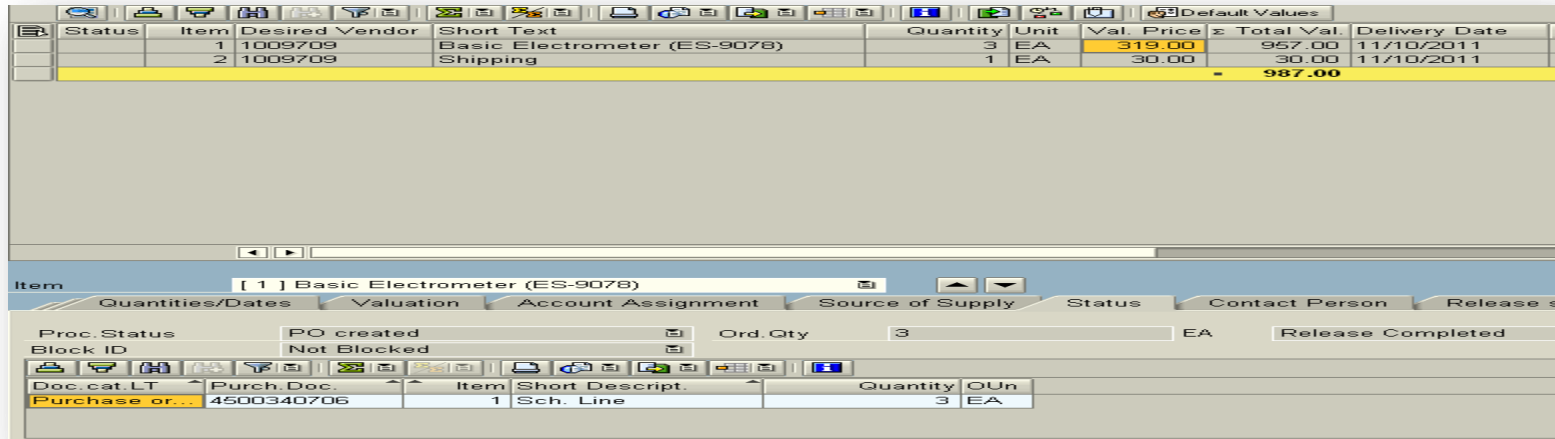
Proc. Status: [Not edited] | Ord. Qty: 0 | EA | Release Completed

Block ID: Not Blocked

Doc. cat. LT	Purch. Doc.	Item	Short Descript.	Quantity	OUn

Refresh

When PO has been created it will appear on the Status tab



The screenshot shows the SAP PO Status tab for a purchase order. The main table lists items with their status, quantities, and prices. The status for all items is 'PO created'. The total value is 987.00.

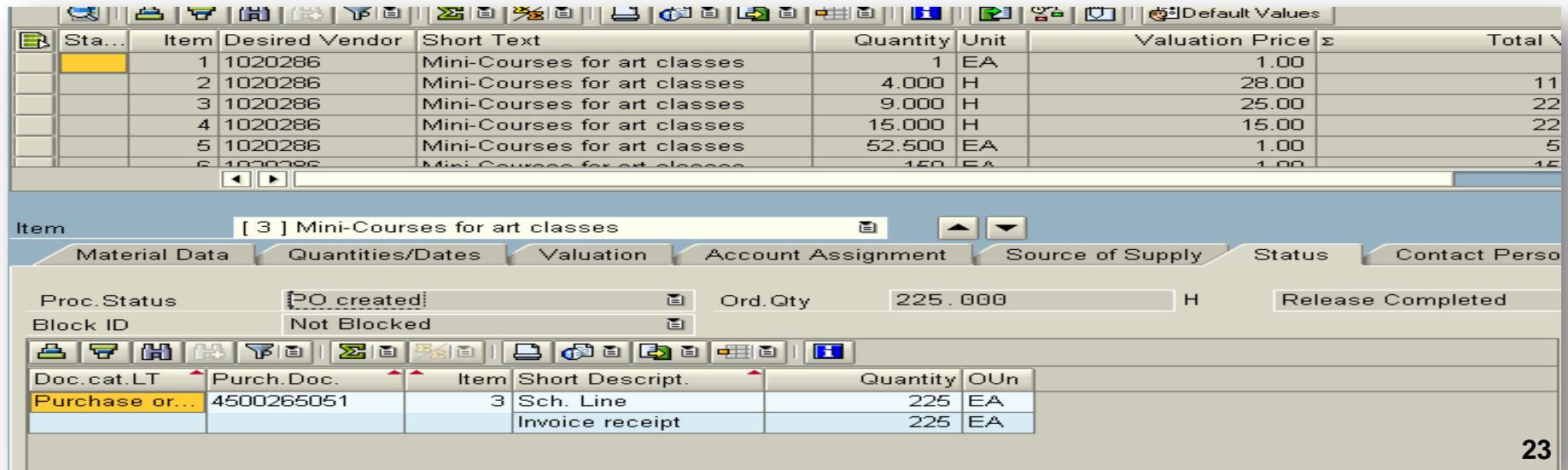
Status	Item	Desired Vendor	Short Text	Quantity	Unit	Val. Price	Σ Total Val.	Delivery Date
	1	1009709	Basic Electrometer (ES-9078)	3	EA	319.00	957.00	11/10/2011
	2	1009709	Shipping	1	EA	30.00	30.00	11/10/2011
							987.00	

Item: [1] Basic Electrometer (ES-9078)

Proc. Status: PO created
Block ID: Not Blocked
Ord. Qty: 3
EA
Release Completed

Doc. cat. LT	Purch. Doc.	Item	Short Descript.	Quantity	OU	Un
Purchase or...	4500340706	1	Sch. Line	3	EA	

PR where PO has been created and has been paid:



The screenshot shows the SAP PR Status tab for a purchase requisition. The main table lists items with their status, quantities, and prices. The status for all items is 'PO created'. The total value is 1.00.

Sta...	Item	Desired Vendor	Short Text	Quantity	Unit	Valuation Price	Σ	Total V
	1	1020286	Mini-Courses for art classes	1	EA	1.00		
	2	1020286	Mini-Courses for art classes	4.000	H	28.00		11
	3	1020286	Mini-Courses for art classes	9.000	H	25.00		22
	4	1020286	Mini-Courses for art classes	15.000	H	15.00		22
	5	1020286	Mini-Courses for art classes	52.500	EA	1.00		5
	6	1020286	Mini-Courses for art classes	150	EA	1.00		15

Item: [3] Mini-Courses for art classes

Proc. Status: PO created
Block ID: Not Blocked
Ord. Qty: 225.000
H
Release Completed

Doc. cat. LT	Purch. Doc.	Item	Short Descript.	Quantity	OU	Un
Purchase or...	4500265051	3	Sch. Line	225	EA	
			Invoice receipt	225	EA	

Refresh

A PR where PO created, received, and paid for:

Sta...	Item	Desired Vendor	Short Text	Quantity	Unit	Valuation Price	Total Value	Delivery Date
	1	1016629	DisplayPort TO DVI-D Adapter,...	50	EA	11.00	550.00	10/26/2011
							550.00	

Item
[1] DisplayPort TO DVI-D Adapter, #FH973AA

Material Data
Quantities/Dates
Valuation
Account Assignment
Source of Supply
Status
Contact Person
Release strategy

Proc. Status: PO created
Ord. Qty: 50
EA
Release Completed

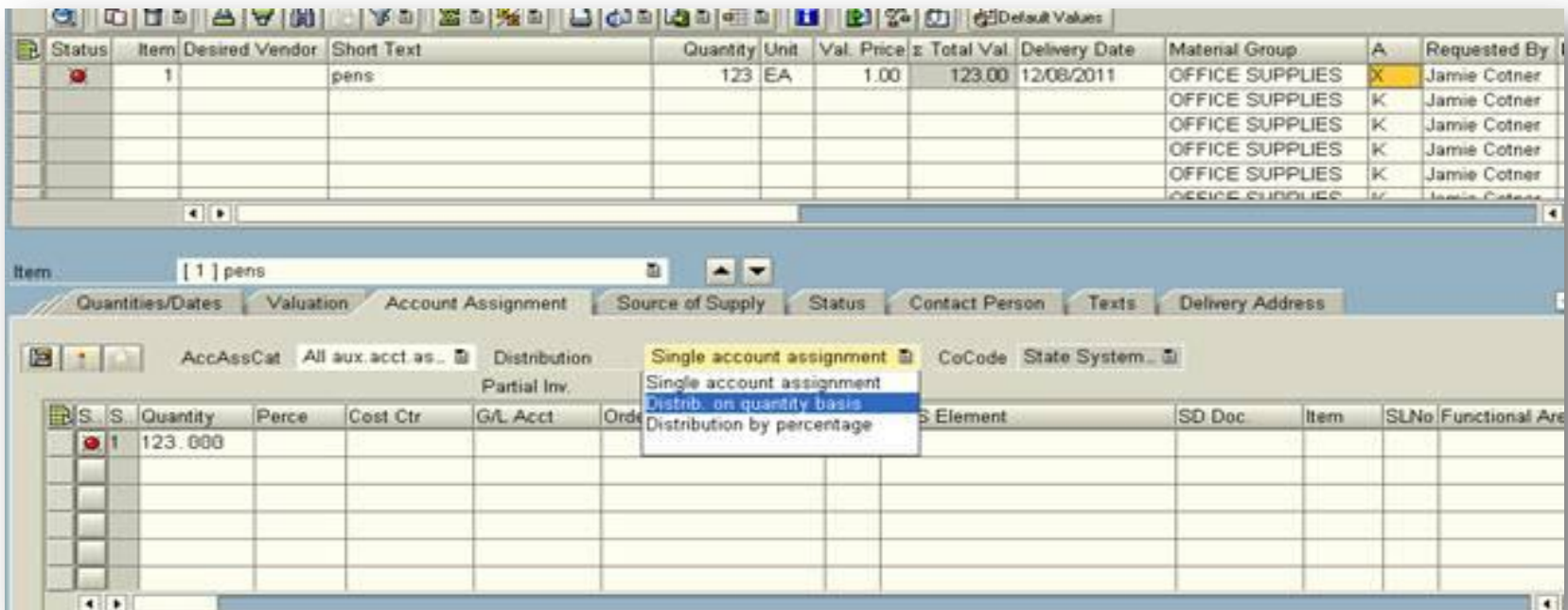
Block ID: Not Blocked

Doc.cat.LT	Purch.Doc.	Item	Short Descript.	Quantity	OU
Purchase or...	4500339834	1	Sch. Line	50	EA
			Goods receipt	50	EA
			Invoice receipt	50	EA

To view the PO (and all details) double click the PO # under the Purch Doc. field

Refresh

- To **split** between cost center and grant enter “X” vs. current default setting of “K”
 - Other options - “P” project or “G” grant*



Status	Item	Desired Vendor	Short Text	Quantity	Unit	Val. Price	Total Val.	Delivery Date	Material Group	A	Requested By
	1		pens	123	EA	1.00	123.00	12/08/2011	OFFICE SUPPLIES	X	Jamie Cotner
									OFFICE SUPPLIES	K	Jamie Cotner
									OFFICE SUPPLIES	K	Jamie Cotner
									OFFICE SUPPLIES	K	Jamie Cotner
									OFFICE SUPPLIES	K	Jamie Cotner
									OFFICE SUPPLIES	K	Jamie Cotner

Item: [1] pens

Quantities/Dates Valuation Account Assignment Source of Supply Status Contact Person Texts Delivery Address

AccAssCat All aux. acct. as... Distribution Single account assignment CoCode State System...

Partial Inv. Single account assignment Distrib. on quantity basis Distribution by percentage

S.	S.	Quantity	Perce	Cost Ctr	G/L Acct	Ord	S Element	SD Doc	Item	SLNo	Functional Are
	1	123.000									



Refresher

- Vendor partner (ZM08)

Selection Parameters

PURC Vendor Number		to		
Plant	10	to		
PURC Vendor Name	v*	to		
PURC City		to		
PURC State		to		
PURC Postal Code		to		
Minority Indicator		to		
APAY Vendor Number		to		
PURC Flagged for Delete		to		
PURC Blocked		to		
Purchase Organization		to		

Address Option

☒ PURC Address

☐ APAY Address

Select the clock (execute) icon.

Vendor	Plant	A/P Vendor	Minority Ind.	Pur Name	Pur Name 2	Pur Street	Pur City	Pur State	Pur Zip	Pur Phone	Pur Fax
1009972	10	2030250	MJR	VERSATILE SYSTEMS, INC.		SUITE 100 4900 RITTER ROAD	MECHANICSBURG	PA	17055	800-851-1281	717-796-9759
1013441	10	2030681	MJR	VANTAGE LIGHTING INC		PO BOX 534	UNIONVILLE	PA	19375	800-664-6671	888-880-8874
1013468	10	2030688		VERISIGN, INC.		1350 CHARLESTON RD	MOUNTAIN VIEW	CA	94043		
1013478	10	2030890	MJR	VERIZON WIRELESS		PO BOX 17464	BALTIMORE	MD	21297-1464		
1013482	10	2047766	MJR	VERNIER SOFTWARE & TECHNOLOGY LLC		13979 SW MILLIKAN WAY	BEAVERTON	OR	97005-2886	888-837-6437	503-277-2440
1013499	10	2030894		VICTOR E. MUNCY, INC.		210 PEACOCK ST	POTTSVILLE	PA	17901	(570) 622-8480	(570) 622-7564
1013535	10	2061275		VIOLA KROUSE		RR 3BOX 167	KUNKLETOWN	PA	18058		
1013553	10	2030900	WBE	VISUAL SOUND		1235 S. HARRISBURG ST, SUITE E	HARRISBURG	PA	17113	(717) 985-1957	(717) 985-9552
1013584	10	2044294	MJR	VOYAGER FLEET SYSTEMS, INC.		PO BOX 790049	HOUSTON	TX	77279-0049	800-987-6591	
1013588	10	2030905	MJR	VWR INTERNATIONAL INC		405 HERON DR	BRIDGEPORT	NJ	08014	800-932-5000	866-329-2897
1014169	10	2030896		VIDEOLearning SYSTEMS INC		850 W. LANCASTER AVE	BRYN MAWR	PA	19010		610-525-2563
1016841	10	2030872		VALIANT IMC		55 RUTA COURT	SOUTH HACKENSACK	NJ	07606	800-825-4268...	800-557-2637
1017275	10	2030882		VARIAN INC.		2700 MITCHELL DR	WALNUT CREEK	CA	94598	800-926-3000	925-945-2360
1017390	10	2030892	MJR	VERSTEEL		2332 CATHY LANE	JASPER	IN	47546	800-876-2120	(812) 482-9318
1019223	10	2123002	MJR	VENTURE PUBLICATIONS INC		2710 LONGWOOD DR	FRANKLIN	TN	37069	(615) 662-0236	(615) 662-0230
1020058	10	2030903	MJR	VOICE		KEHR UNION BOX 97	BLOOMSBURG	PA	17815	(570) 389-4457	
1020135	10	2030901	MJR	VISUAL SOUND INC		485 PARK WAY	BROOMALL	PA	19008	610-544-8700	610-544-3385
1020178	10	2030873	MBE	VALLEY FISHING & HUNTING		228 MAIN ST	CATAWISSA	PA	17820	(570) 356-2434	
1020257	10	2030897		VIS CONSULTANTS		2000 CENTURY PLAZA SUITE 400	COLUMBIA	MD	21044	(800) 847-2243	
1020320	10	2029437		VOELCKER INC.		350 FERRY ST	DANVILLE	PA	17821	(570) 275-2337	
1020396	10	2030892		VARIAN INC.		250 SUMMIT DR	EASTON	PA	18042	800-926-3000	
1020511	10	2030899	MJR	VERIZON		10TH FLOOR/STRAWBERRY SQUARE	HARRISBURG	PA	17101		
1020656	10	2030899		VISION DATA BASE SYSTEMS		1562 PARK LANE SOUTH, SUITE 500	JUPITER	FL	33458	(561) 748-0711	
1020751	10	2030895		VIDEO SERVICE OF AMERICA		PO BOX 29109	LINCOLN	NE	68529	(800) 888-214...	
1020957	10	2030879	MJR	VALUE LINE PUBLISHING INC		PO BOX 3988	NEW YORK	NY	10008-3988		
1021171	10	2030876		VALLEY REFRIGERATION		345 LAUREL ST	PITTSBURGH	PA	15640	570-654-4513	570-654-5780
1021331	10	2030902		VNAHEALTH SYSTEM		21 WEST INDEPENDENT ST	SHAMOKIN	PA	17872		
1021349	10	2030875		VALLEY QUARRY		474 NEWVILLE RD	SHIPPENSBURG	PA	17257	717-532-8535	1-814-766-4448
1021498	10	2030871		VACUMETRICS INC/VACUMED DIVISION		4538 WESTINGHOUSE ST	VENTURA	CA	93003	(800) 235-3333	(805) 654-8759
1021628	10	2030892	MJR	VERSTEEL		C/O SUPPLY SOURCE	WILLIAMSPORT	PA	17701	(800) 633-8753	
1027531	10	2137795	MJR	VHPS		1635 JAMES MADISON HWY	GORDONSVILLE	VA	22942		
1031854	10	2044548		VOTERVIRGIN		PO BOX 4542	AUSTIN	TX	78765	866-649-9182	
1032499	10	2046027	MJR	VALLEY AG & TURF		141 BYERS LANE	WATSONTOWN	PA	17777	570-538-3557	570-538-...



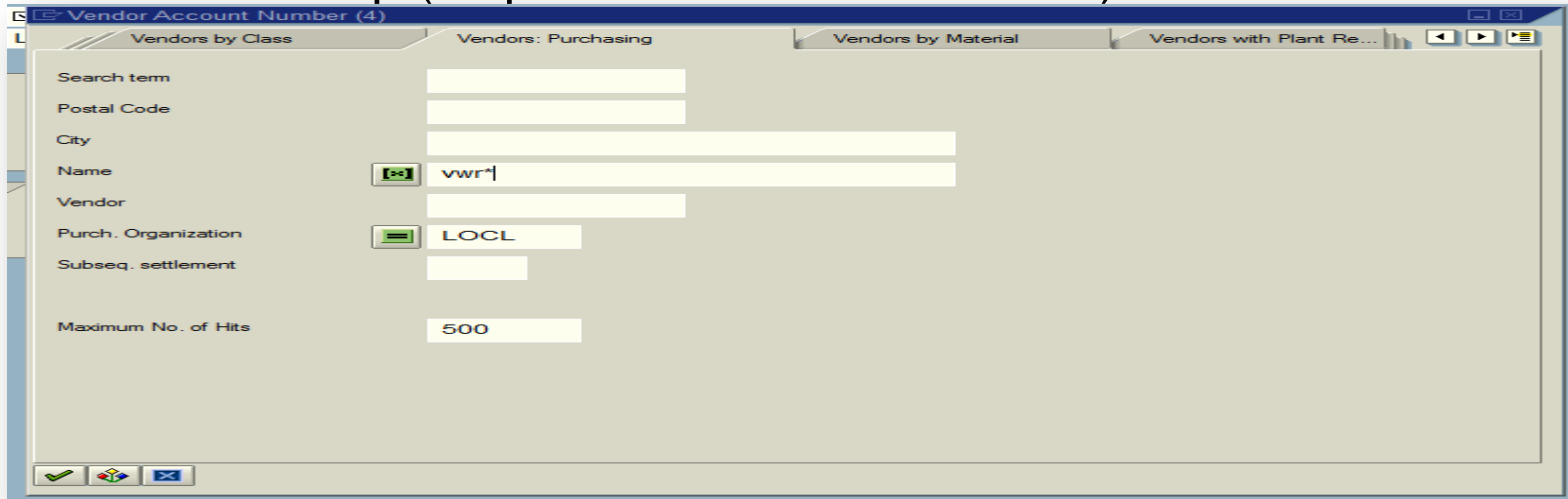
Refresher

This will display the VWR vendor # we are partnered with.

Vendor	Plant	A/P Ven...	Minority Ind.	Pur Name	Pur Name 2	Pur Street	Pur City	Pur State	Pur Zip	Pur Phone	Pur Fax
1013588	10	2030905	MJR	VWR INTERNATIONAL INC		405 HERON DR	BRIDGEPORT	NJ	08014	800-932-5000	866-329-2897
1077060	10	2152469	MJR	VRSE, INC		1230 OLD BERWICK RD	BLOOMSBURG	PA	17815	570-387-8820	570-387-9102
1069379	10	2135478	MJR	VPI		PO BOX 7726	DALLAS	TX	75209	800-244-4457	800-321-5882
1013584	10	2044294	MJR	VOYAGER FLEET SYSTEMS, INC.		PO BOX 790049	HOUSTON	TX	77279-0049	800-987-6591	
1061992	10	2118367	MJR	VOUGHT'S EQUIPMENT RENTAL INC.		439 S. MARKET ST	ELYSBURG	PA	17824	570-672-2506	
1031854	10	2044548		VOTERVIRGIN		PO BOX 4542	AUSTIN	TX	78765	866-649-9182	
1052016	10	2122431	MJR	VOLZ ENVIRONMENTAL SERVICES, INC.		1200 GULF LAB RD	PITTSBURGH	PA	15238	412-826-8480	412-826-8488
1043681	10	2070097	MJR	VOITEK TV & APPLIANCES INC		1313 WYOMING AVE	EXETER	PA	18643	570-655-8811	570-655-6541
1057864	10	2108648	MJR	VOICES FOR ALL		5 MAXWELL DR, STE 135	CLIFTON PARK	NY	12065	518-391-2317	
1020058	10	2030903	MJR	VOICE		KEHR UNION BOX 97	BLOOMSBURG	PA	17815	(570) 389-4457	
1020320	10	2029437		VOELCKER INC.		350 FERRY ST	DANVILLE	PA	17821	(570) 275-2337	
1083127	10	2166656	MJR	VOCALNET INC		1159 PITTSFORD-VICTOR RD	PITTSFORD	NY	14534	800-905-VOCAL	585-264-9434
1021331	10	2030902		VNAHEALTH SYSTEM		21 WEST INDEPENDENT ST	SHAMOKIN	PA	17872		
1067418	10	2152600	MJR	VMWARE INC.		3401 HILLVIEW AVE	PALO ALTO	CA	94304	650-427-5000	650-427-5001
1062634	10	2120104	MJR	VITONE, DYLAN		2715 SHADY AVE #5	PITTSBURGH	PA	15217	412-421-6932	
1063543	10	2122324	MJR	VITAL SIGNS		425 MARINE BLVD	JACKSONVILLE	NC	28540	910-938-6060	910-938-1044

Refresh

- Vendor look-up (as part of ME51N PR create)



Vendor Account Number (4)

Vendors by Class Vendors: Purchasing Vendors by Material Vendors with Plant Re...

Search term

Postal Code

City

Name vwr*

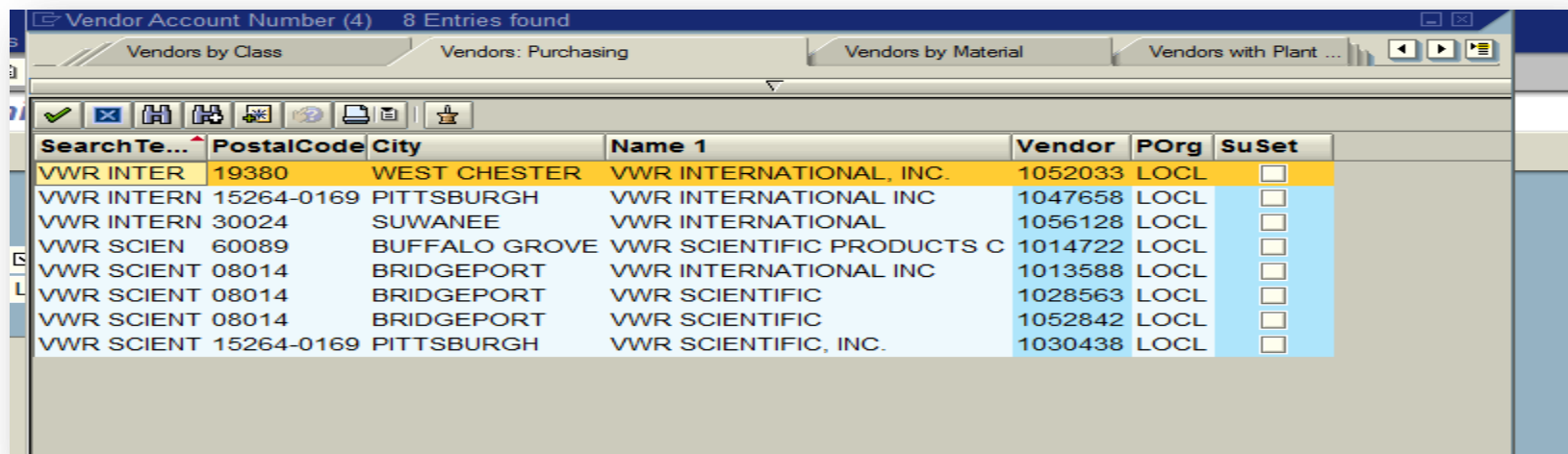
Vendor

Purch. Organization LOCL

Subseq. settlement

Maximum No. of Hits 500

For Purchasing vendor only, must be on Purchasing tab. If first word of vendor name is known, only need asterisk at the end. If the city is known, that information can also be added. Below is the next screen – which shows all vendors under VWR



Vendor Account Number (4) 8 Entries found

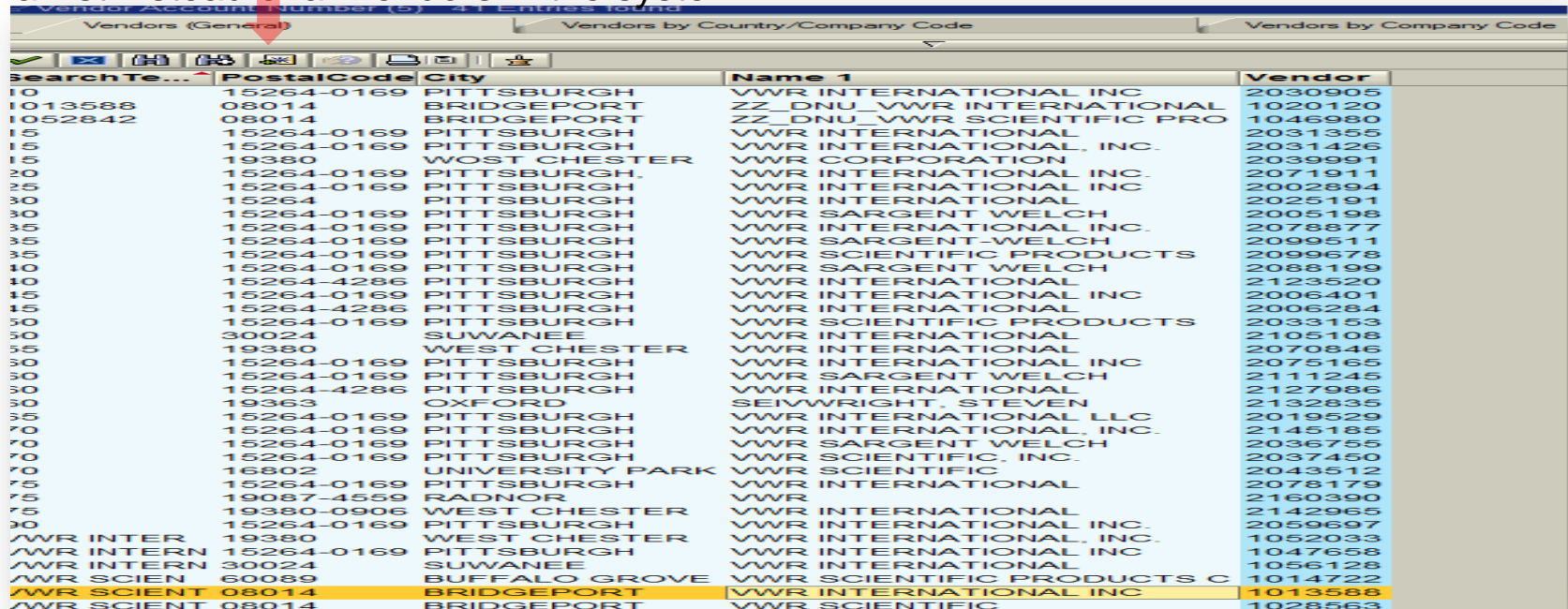
Vendors by Class Vendors: Purchasing Vendors by Material Vendors with Plant ...

SearchTe...	PostalCode	City	Name 1	Vendor	POrg	SuSet
VWR INTER	19380	WEST CHESTER	VWR INTERNATIONAL, INC.	1052033	LOCL	<input type="checkbox"/>
VWR INTERN	15264-0169	PITTSBURGH	VWR INTERNATIONAL INC	1047658	LOCL	<input type="checkbox"/>
VWR INTERN	30024	SUWANEE	VWR INTERNATIONAL	1056128	LOCL	<input type="checkbox"/>
VWR SCIENT	60089	BUFFALO GROVE	VWR SCIENTIFIC PRODUCTS C	1014722	LOCL	<input type="checkbox"/>
VWR SCIENT	08014	BRIDGEPORT	VWR INTERNATIONAL INC	1013588	LOCL	<input type="checkbox"/>
VWR SCIENT	08014	BRIDGEPORT	VWR SCIENTIFIC	1028563	LOCL	<input type="checkbox"/>
VWR SCIENT	08014	BRIDGEPORT	VWR SCIENTIFIC	1052842	LOCL	<input type="checkbox"/>
VWR SCIENT	15264-0169	PITTSBURGH	VWR SCIENTIFIC, INC.	1030438	LOCL	<input type="checkbox"/>

Refresh

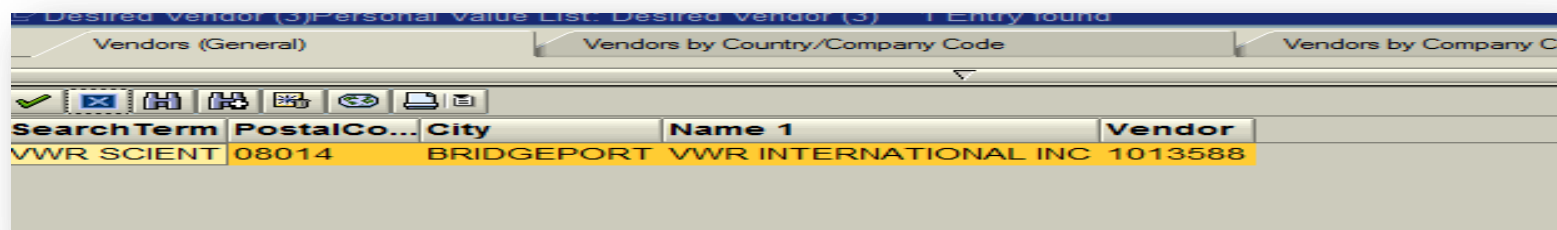
- Vendor personal list.

Click on vendor to be included in your personal list – click on the star icon with the + sign in the bottom left. This will add that vendor to your personal list and whenever you submit a PR and you look at the drop down on desired vendor – you will see your personal list instead of all vendors in the system.



Search Term...	PostalCode	City	Name 1	Vendor
10	15264-0169	PITTSBURGH	VWR INTERNATIONAL INC	2030905
1013588	08014	BRIDGEPORT	ZZ_DNU_VWR INTERNATIONAL	1020120
1052842	08014	BRIDGEPORT	ZZ_DNU_VWR SCIENTIFIC PRO	1046980
15	15264-0169	PITTSBURGH	VWR INTERNATIONAL	2031355
15	15264-0169	PITTSBURGH	VWR INTERNATIONAL, INC.	2031426
15	19380	WEST CHESTER	VWR CORPORATION	2039991
20	15264-0169	PITTSBURGH	VWR INTERNATIONAL INC.	2071911
25	15264-0169	PITTSBURGH	VWR INTERNATIONAL INC	2002894
30	15264	PITTSBURGH	VWR INTERNATIONAL	2025191
30	15264-0169	PITTSBURGH	VWR SARGENT WELCH	2005198
35	15264-0169	PITTSBURGH	VWR INTERNATIONAL INC.	2078877
35	15264-0169	PITTSBURGH	VWR SARGENT WELCH	2099511
35	15264-0169	PITTSBURGH	VWR SCIENTIFIC PRODUCTS	2099678
10	15264-0169	PITTSBURGH	VWR SARGENT WELCH	2088199
10	15264-4286	PITTSBURGH	VWR INTERNATIONAL	2123520
15	15264-0169	PITTSBURGH	VWR INTERNATIONAL INC	2006401
15	15264-4286	PITTSBURGH	VWR INTERNATIONAL	2006284
30	15264-0169	PITTSBURGH	VWR SCIENTIFIC PRODUCTS	2033153
30	30024	SUWANEE	VWR INTERNATIONAL	2105108
35	19380	WEST CHESTER	VWR INTERNATIONAL	2070846
30	15264-0169	PITTSBURGH	VWR INTERNATIONAL INC	2075165
30	15264-0169	PITTSBURGH	VWR SARGENT WELCH	2111245
30	15264-4286	PITTSBURGH	VWR INTERNATIONAL	2127986
30	19363	OXFORD	SEIWRIGHT, STEVEN	2132835
35	15264-0169	PITTSBURGH	VWR INTERNATIONAL LLC	2019529
70	15264-0169	PITTSBURGH	VWR INTERNATIONAL, INC.	2145185
70	15264-0169	PITTSBURGH	VWR SARGENT WELCH	2036755
70	15264-0169	PITTSBURGH	VWR SCIENTIFIC, INC.	2037450
70	16802	UNIVERSITY PARK	VWR SCIENTIFIC	2043512
75	15264-0169	PITTSBURGH	VWR INTERNATIONAL	2078179
75	19087-4559	RADNOR	VWR	2160390
75	19380-0906	WEST CHESTER	VWR INTERNATIONAL	2142965
30	15264-0169	PITTSBURGH	VWR INTERNATIONAL INC.	2059697
/WR INTER	19380	WEST CHESTER	VWR INTERNATIONAL, INC.	1052033
/WR INTERN	15264-0169	PITTSBURGH	VWR INTERNATIONAL INC	1047658
/WR INTERN	30024	SUWANEE	VWR INTERNATIONAL	1056128
/WR SCIEN	60089	BUFFALO GROVE	VWR SCIENTIFIC PRODUCTS C	1014722
/WR SCIENT	08014	BRIDGEPORT	VWR INTERNATIONAL INC	1013588
/WR SCIENT	08014	BRIDGEPORT	VWR SCIENTIFIC	1028563









This is a view of your personal vendor list



Search Term	PostalCo...	City	Name 1	Vendor
VWR SCIENT	08014	BRIDGEPORT	VWR INTERNATIONAL INC	1013588

Refresh









To look at all vendors again, click on *world* icon.

Vendors by Class		Vendors: Purchasing		Vendors by Material		Vendors with	
							
SearchTe...	PostalCo...	City	Name 1	Vendor	POrg	SuSet	
VWR INTER	19380	WEST CHESTER	VWR INTERNATIONAL, INC.	1052033	LOCL		<input type="checkbox"/>

This will take you back to the search screen.

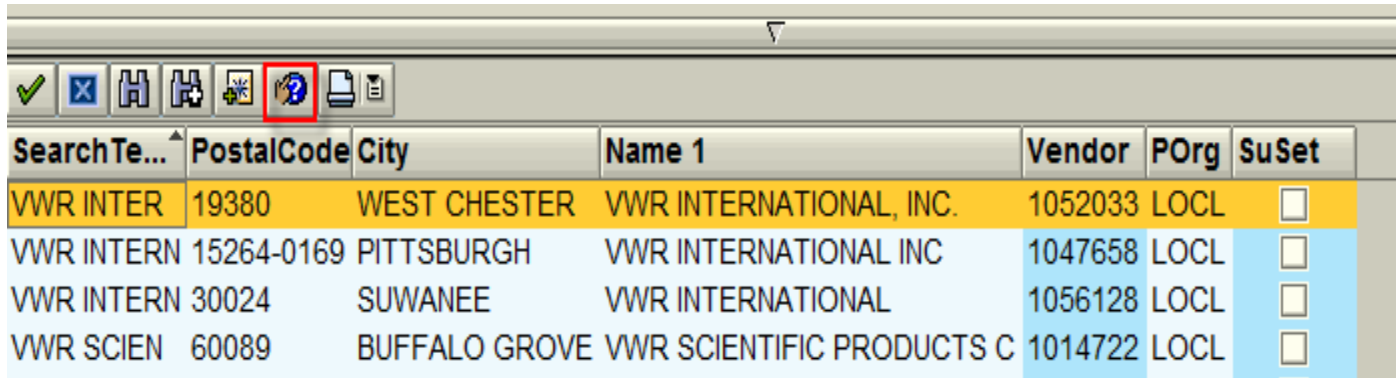
Vendors by Class		Vendors: Purchasing		Vendors by Mater	
Search term	<input type="text"/>				
Postal Code	<input type="text"/>				
City	<input type="text"/>				
Name		<input type="text" value="vwr*"/>			
Vendor	<input type="text"/>				
Purch. Organization		<input type="text" value="LOCL"/>			
Subseq. settlement	<input type="text"/>				

Fill in name again to get all vendors.

Vendors by Class		Vendors: Purchasing		Vendors by Material		Vendors with Plan	
							
SearchTe...	PostalCode	City	Name 1	Vendor	POrg	SuSet	
VWR INTER	19380	WEST CHESTER	VWR INTERNATIONAL, INC.	1052033	LOCL		<input type="checkbox"/>
VWR INTERN	15264-0169	PITTSBURGH	VWR INTERNATIONAL INC	1047658	LOCL		<input type="checkbox"/>
VWR INTERN	30024	SUWANEE	VWR INTERNATIONAL	1056128	LOCL		<input type="checkbox"/>
VWR SCIEN	60089	BUFFALO GROVE	VWR SCIENTIFIC PRODUCTS C	1014722	LOCL		<input type="checkbox"/>
VWR SCIENT	08014	BRIDGEPORT	VWR INTERNATIONAL INC	1013588	LOCL		<input type="checkbox"/>
VWR SCIENT	08014	BRIDGEPORT	VWR SCIENTIFIC	1028563	LOCL		<input type="checkbox"/>
VWR SCIENT	08014	BRIDGEPORT	VWR SCIENTIFIC	1052842	LOCL		<input type="checkbox"/>
VWR SCIENT	15264-0169	PITTSBURGH	VWR SCIENTIFIC, INC.	1030438	LOCL		<input type="checkbox"/>

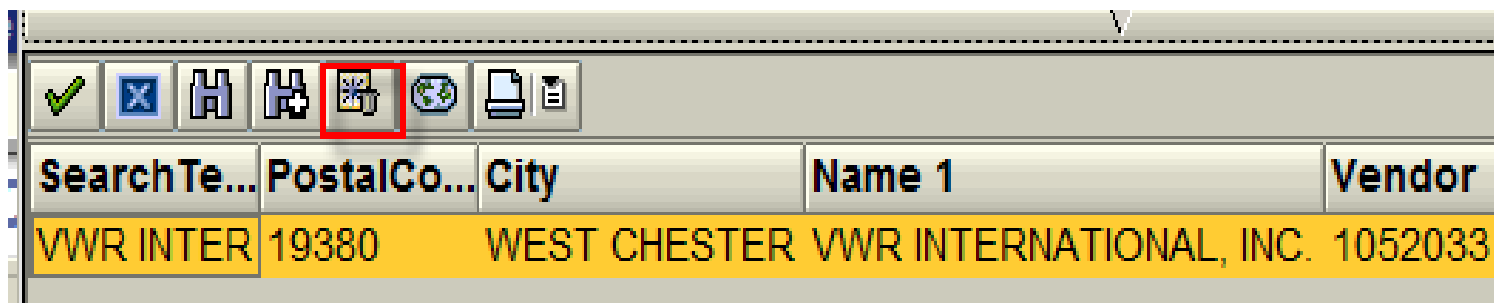
Refresh

To see your personal list again, click on the white question mark.



SearchTe...	PostalCode	City	Name 1	Vendor	POrg	SuSet
VWR INTER	19380	WEST CHESTER	VWR INTERNATIONAL, INC.	1052033	LOCL	<input type="checkbox"/>
VWR INTERN	15264-0169	PITTSBURGH	VWR INTERNATIONAL INC	1047658	LOCL	<input type="checkbox"/>
VWR INTERN	30024	SUWANEE	VWR INTERNATIONAL	1056128	LOCL	<input type="checkbox"/>
VWR SCIEN	60089	BUFFALO GROVE	VWR SCIENTIFIC PRODUCTS C	1014722	LOCL	<input type="checkbox"/>

To delete a vendor from your personal list, click on the star icon with the arrow up.



SearchTe...	PostalCo...	City	Name 1	Vendor
VWR INTER	19380	WEST CHESTER	VWR INTERNATIONAL, INC.	1052033

Refresh

Copying lines on a PR – after submitting all information (including item details, acct. assignment, etc)

St...	Item	Des. Vendor	Short Text	Quantity	Unit	Valuation Price	Total Value	Delivery Date	Matl Group	A	Requisitioner	PGr	Trackin
	1	1020665	Upgrade to Boiler operating controls	1	EA	24,159.00	24,159.00	11/04/2011	OFFICE S...	P	Carol DePoe	101	
						0.00	0.00		OFFICE S...	K	D. Shamburg	101	
						0.00	0.00		OFFICE S...	K	D. Shamburg	101	
						0.00	0.00		OFFICE S...	K	D. Shamburg	101	
						0.00	0.00		OFFICE S...	K	D. Shamburg	101	

Highlight line 1 before clicking on the line under St

St...	Item	Des. Vendor	Short Text	Quantity	Unit	Valuation Price	Total Value	Delivery Date	Matl Group	A	Requisitioner	PGr	Trackin
	1	1020665	Upgrade to Boiler operating controls	1	EA	24,159.00	24,159.00	11/04/2011	OFFICE S...	P	Carol DePoe	101	
						0.00	0.00		OFFICE S...	K	D. Shamburg	101	
						0.00	0.00		OFFICE S...	K	D. Shamburg	101	

Once highlighted – right click or use copy icon.

St...	Item	Des. Vendor	Short Text	Quantity	Unit	Valuation Price	Total Value	Delivery Date	Matl Group	A	Requisitioner	PGr	Trackin
	1	1020665	Upgrade to Boiler operating controls	1	EA	24,159.00	24,159.00	11/04/2011	OFFICE S...	P	Carol DePoe	101	
	2	1020665	Upgrade to Boiler operating controls	1	EA	24,159.00	24,159.00	11/04/2011	OFFICE S...	P	Carol DePoe	101	
						0.00	0.00		OFFICE S...	K	D. Shamburg	101	
						0.00	0.00		OFFICE S...	K	D. Shamburg	101	

Refresher

- Commitment Items - When creating PR's please ensure correct GL Account Listing and Descriptions

http://www.bloomu.edu/documents/fin_bus_svcs/CI_GL_AcctList_Descriptions.pdf

Account Group	Available Commitment Items	Name	Descriptions and Examples - Please note, where not self-explanatory, these examples are representative of the types of expenses in each account, and are not to be considered all inclusive.
Operating Expenditures			
Please use the following list of Commitment Items / Accounts for all operating expenditures.			
605 Postage/Freight - Costs of postal services (including electronic address verification), including stamps, metered mail, permits in lieu of postage, registered mail, stamped postcards and envelopes, rental of post office boxes, contracted mailing services, commercial carrier services (i.e. UPS, FedEx), delivery services, and other "freight out" costs.			
605110	Postage		Bulk mailing. Electronic address updates. All postage related expenses except commercial carrier.
605130	Freight/Shipping		Commercial carrier ("freight out") services (i.e. UPS, FedEx). Freight/shipping charges attached to invoices for equipment/supply delivery.
606 Telecommunications Charges - Costs associated with telephone equipment, line rental, toll charges (including credit card, collect, third party charges, and telegrams), installation charges, changes to telephone equipment or service, and PANET/SSHEnet charges.			
606110	Local Telephone Service		Local Service including line and usage (Verizon Dial Tone line charges, Verizon Idearc Media Directory Service).
606115	Long Distance Telephone Service		Long distance, toll free (800 service), and calling card service. Verizon local calling, usage and fees. Toll charges international and relay service.
606120	Telecommunication Leases		Internet Charges not Included in SSHEnet - Residence Life billed thru COPA contract and Level 3 Telcove directory.
606125	Telephone Line Rental		Dark fiber and copper line rentals - Magee line charges (fiber connection) and IMS fiber charges.
606130	Telephone Equipment Installation		One-time charges for installing or changing telephone equipment or service. Telephones.
606135	PANET Charges		Admin long distance billed through COPA contract (ABS) - PANET billing received from DGS.
606140	SSHEnet Charges		State System SSHEnet line and internet charges - billed through COPA contract ABS.
606155	Cellular Phones		Wireless communication devices - Verizon Wireless campus cell phones, Nextel Wireless Residence Life telephones, pager services.
606160	Videoconferencing		External video conferencing usage.
606170	Internet Service Provider		Internet service fees.

Refresher

- **Discounts** - The requisition entry should include a header note for the buyer to include the discount or surcharge, including the value or percentage.
- **No charge line items** – Include comment in item long text of other item that subject material is at no charge.
- **PO's over multiple FY's** – Include separate line item for each FY. See below.

m	A	I	Material	Short Text	PO Quantity	OUn	Deliv. Date	Stor. Lo...	Requisitioner	Net Price
	K			11-12 ANNUAL ACCESS FEE	1	EA	06/30/2012		L.Hemrick	4,
	K			12-13 ANNUAL ACCESS FEE	1	EA	12/31/2012		L.Hemrick	4,

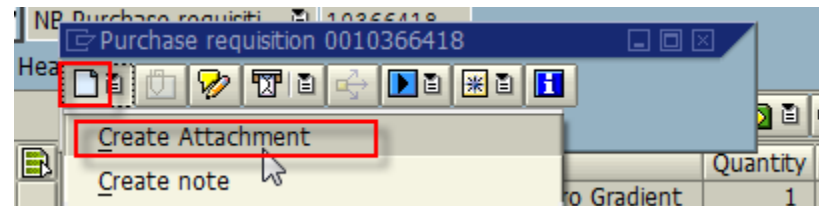
- **Short and Long text** – There is no need to duplicate the information submitted in the short text field into the long text field.

Refresher

- **Attachments** – Whenever possible, attach any applicable supplier quotations by using the PR.
1. Add an attachment to a purchase requisition – Transaction ME51N, ME52N, or ME53N. Click on the left hand side of the icon enclosed below:

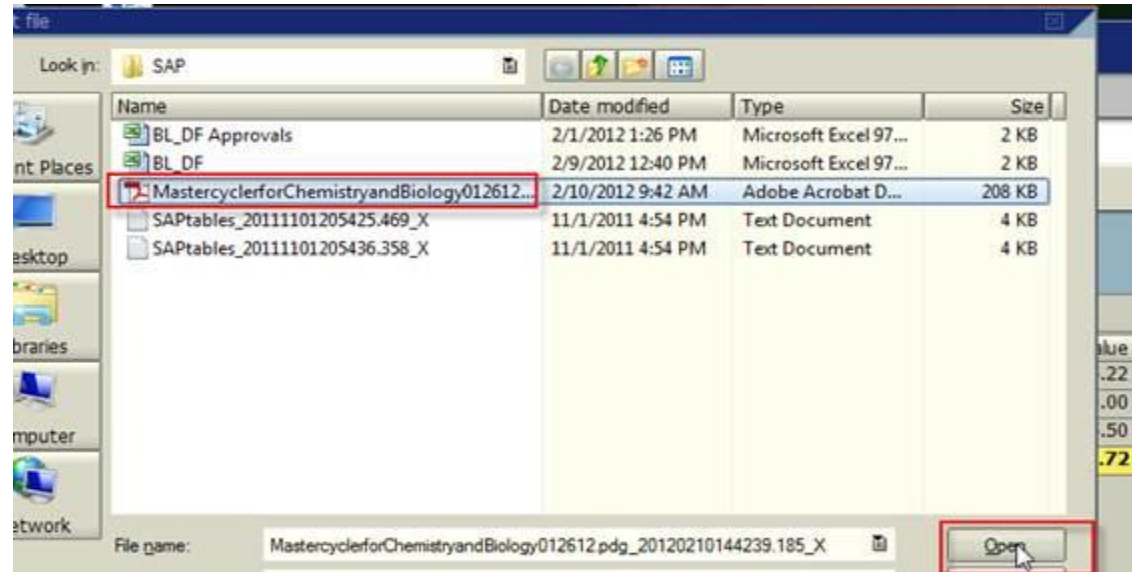


2. The following pop box will appear – Click on the blank page icon and select “Create Attachment” from the list.

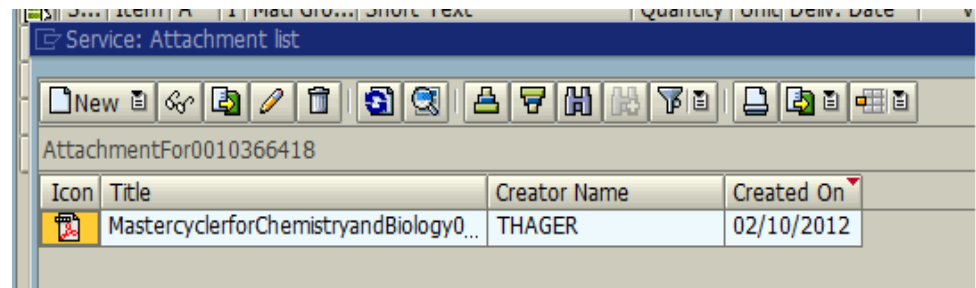
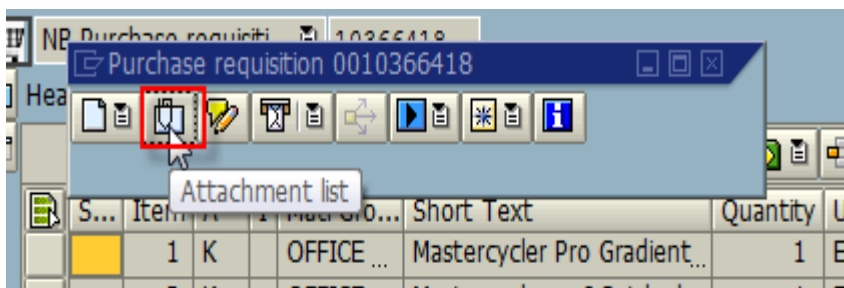


Refresh

3. Select the file to attach and click on “open” as shown:



4. The pop up box is displayed again & the “attachment list” icon is no longer gray. Click here to see the attachments.



Refresher

Service Purchase Outline Agreements (SPOA's)

- Background:
 - ❖ 47 doc prefix
 - ❖ Used for repetitive service requirements
 - ❖ NTE - \$10K/yr
 - ❖ Does not encumber funds
- Examples:
 - ❖ Mini courses, bus repairs, typewriter repairs, various rentals, elevator service
- Review and Creation:
 - ❖ All active SPOA's posted on Procurement website with periodic update on balance remaining <http://www.bloomu.edu/purchasing/resources>
 - ❖ SPOA's with activity will be renewed (new agreement created) by Procurement if previous year usage
 - ❖ Requests for new SPOA's should be sent to Procurement email account Purchasing RO Approval PurchasingROApproval@bloomu.edu

Procurement will send copies of fully executed SPOA's to recipient listed on the PR

Refresher

Cycle times (*upon receipt by Procurement Dept.*)

Value of Purchase	Requestor Action	Procurement Process	Approximate Processing Time
GOODS			
\$0-\$10,000	<p>Provide verbal or written quotes but no formal bidding required. Should solicit 3 informal quotes, when possible.</p> <p>Enter requisition</p> <p>Purchases under \$1,000 can use p-card (<i>in accordance with published Pcard procedures</i>) http://www.bloomu.edu/finance_busoffice/purchasing</p> <p><i>If using Pcard, do not also enter a PR</i></p>	<ul style="list-style-type: none"> PO Created Signed by Authorized Agent and sent to vendor 	1-5 days
>\$10,000	<p>Enter requisition</p> <p>Solicit at least 3 competitive quotes, where feasible, in advertising and bid process</p>	<ul style="list-style-type: none"> RFQ or RFP Created Bids Evaluated PO Created Signed by Authorized Agent and sent to vendor 	15-30 days

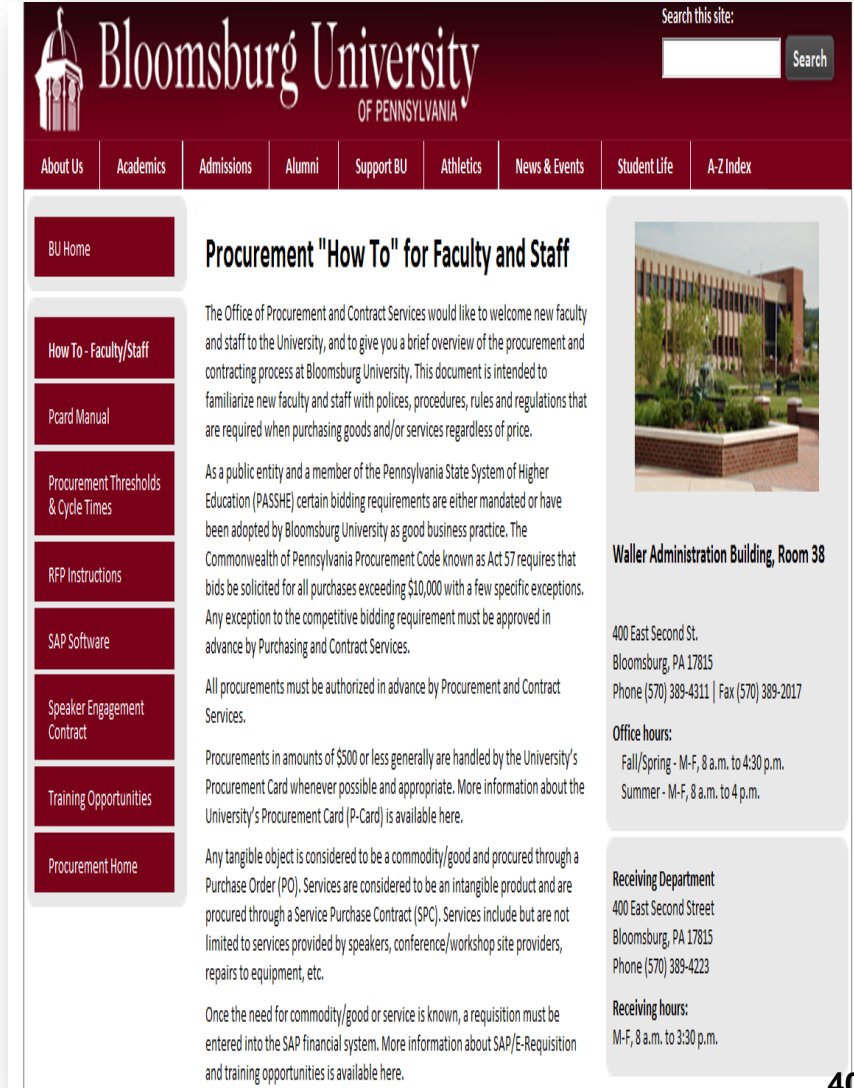
Refresher

• Cycle times

SERVICES			
\$0-\$5000	Enter Requisition Provide verbal quote—no formal bidding required	<ul style="list-style-type: none"> • PO/SPC Created • Sent to vendor for signature • Signed by Authorized Agent 	5-10 days depending on vendor signature time
>\$5000-\$10,000	Enter requisition Provide any written quotes, but no formal bidding required	<ul style="list-style-type: none"> • PO/SPC Created • Sent to vendor for signature • PO/SPC Signed by Authorized Agent • University Legal Review and signature 	10 -20 days depending on legal review
>\$10,000-\$20,000	Enter requisition Participate in advertising and bid process	<ul style="list-style-type: none"> • IFB, RFQ or RFP Created • Bids evaluated • PO/SPC Created • Signed by Authorized Agent and sent to vendor • University Legal Review and Signature 	<\$20,000 = 10-20 days
>\$20,000-\$500,000	Enter requisition Participate in advertising and bid process	<ul style="list-style-type: none"> • IFB, RFQ or RFP Created • Bids evaluated • PO/SPC Created • Sent to vendor for signature • Signed by Authorized Agent • University Legal review and signature • OAG Review and signature 	>\$20,000 = 30-90 days (OAG is allowed up to 30 days for signature)
>\$500,000	Enter requisition Participate in advertising and bid process	<ul style="list-style-type: none"> • IFB, RFQ or RFP Created • Bids evaluated • PO/SPC Created • Sent to vendor for signature • Signed by Authorized Agent • University Legal review and signature • OAG Review and signature • OGC Review and signature 	90-180 days (OAG and OGC signatures can take up to 30 days each)

Procurement Website

- Added Contacts, Responsibilities, Org Chart
- Updated list of Forms and Resources
- Added a “How-to” Section:
 1. Procurement Thresholds & Cycle Times
 2. RFP instructions
 3. New SAP reference materials
 4. Speaker Engagement Process
- New Policy & Procedure Section:
 1. Competitive bidding
 2. Protests
 3. Contracts with consultants
 4. Emergency contracts
 5. Sole source contracts
 6. Unauthorized purchases
- New Vendor Information Section



The screenshot displays the Bloomsburg University of Pennsylvania Procurement website. The header features the university's name and logo, a search bar, and a navigation menu with links to About Us, Academics, Admissions, Alumni, Support BU, Athletics, News & Events, Student Life, and A-Z Index. The main content area is titled "Procurement 'How To' for Faculty and Staff" and includes a welcome message from the Office of Procurement and Contract Services, a brief overview of the procurement process, and a list of resources such as Procurement Thresholds & Cycle Times, RFP Instructions, SAP Software, Speaker Engagement Contract, Training Opportunities, and Procurement Home. A sidebar on the right provides contact information for the Waller Administration Building, Room 38, including the address, phone, fax, and office hours.

Bloomsburg University
OF PENNSYLVANIA

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[BU Home](#)

[How To - Faculty/Staff](#)

[Pcard Manual](#)

[Procurement Thresholds & Cycle Times](#)

[RFP Instructions](#)

[SAP Software](#)

[Speaker Engagement Contract](#)

[Training Opportunities](#)

[Procurement Home](#)

Procurement "How To" for Faculty and Staff

The Office of Procurement and Contract Services would like to welcome new faculty and staff to the University, and to give you a brief overview of the procurement and contracting process at Bloomsburg University. This document is intended to familiarize new faculty and staff with policies, procedures, rules and regulations that are required when purchasing goods and/or services regardless of price.

As a public entity and a member of the Pennsylvania State System of Higher Education (PASSHE) certain bidding requirements are either mandated or have been adopted by Bloomsburg University as good business practice. The Commonwealth of Pennsylvania Procurement Code known as Act 57 requires that bids be solicited for all purchases exceeding \$10,000 with a few specific exceptions. Any exception to the competitive bidding requirement must be approved in advance by Purchasing and Contract Services.

All procurements must be authorized in advance by Procurement and Contract Services.

Procurements in amounts of \$500 or less generally are handled by the University's Procurement Card whenever possible and appropriate. More information about the University's Procurement Card (P-Card) is available here.

Any tangible object is considered to be a commodity/good and procured through a Purchase Order (PO). Services are considered to be an intangible product and are procured through a Service Purchase Contract (SPC). Services include but are not limited to services provided by speakers, conference/workshop site providers, repairs to equipment, etc.

Once the need for commodity/good or service is known, a requisition must be entered into the SAP financial system. More information about SAP/E-Requisition and training opportunities is available here.

Waller Administration Building, Room 38

400 East Second St.
Bloomsburg, PA 17815
Phone (570) 389-4311 | Fax (570) 389-2017


Office hours:
Fall/Spring - M-F, 8 a.m. to 4:30 p.m.
Summer - M-F, 8 a.m. to 4 p.m.

Receiving Department
400 East Second Street
Bloomsburg, PA 17815
Phone (570) 389-4223

Receiving hours:
M-F, 8 a.m. to 3:30 p.m.



Procurement Website


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[Competitive Bidding](#)
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[Contracting With Consultants](#)
[Emergency Contracts](#)
[Employee-Employer Relationship](#)
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[Sole Source Contracts](#)
[Speaker Engagement Contract](#)
[Resources](#)
[Unauthorized Purchases](#)
[Procurement Home](#)

Authority Policy


Contracting Officer

For the sake of clarity, the primary person who has been delegated with contracting officer authority on behalf of the University, without financial limitations, is Dr. Richard H. Rugen, Vice President for Administration and Finance. In the event of his absence, that responsibility shall fall to Claudia Thrush, Assistant Vice President for Finance, Budget and Business Services. Jeff Mandel, Director of Procurement and Operations has purchases and contract authority to \$100,000. No other individual has contracting signatory authority on behalf of the University unless delegated in advance and in writing by Dr. Rugen, Ms. Thrush or the President. The procurement law (Act 57) has established checks and balances to be certain that more than one individual is involved in the approval process. To this end, this Act has designated a Contracting Officer and a Fiscal Officer designation.

Duties of the Contracting Officer:

1. Only individual authorized to procure goods, services, supplies and construction; enter into and administer contracts; and make determinations with respect to contracts for the State System.
2. Determine the method of source selection and public notice.
3. Makes the written determination for sole source purchases.
4. Determines pre-qualifications of prospective bidders, whenever a pre-qualification list is to be used for the procurement action.
5. Whenever a contract type other than a firm, fixed-price contract or an emergency procurement, the contracting officer will first review the contractor's accounting system to ensure it meets acceptable accounting standards.
6. Inspect the plant of contractors or subcontractors and audit cost and pricing data to the extent necessary to ensure that the provisions of the contract are met and the pricing is accurate.
7. Appoint selection committees.
8. Ensure that withdrawals of bids are made in accordance with the provisions of Act 57.
9. Determine the security, payments and performance bonding required in each contract.
10. Hear and issue findings on bid protests, claims, and/or disputes concerning solicitation, award or administration of a contract.

Fiscal Officer


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[BU Home](#)

[Doing Business with BU](#)
[Bidding and Contracting](#)
[Invoice Processing](#)
[Directions](#)
[Purchasing Department](#)

How to Do Business with Bloomsburg University

Bloomsburg University is a member institution of the Pennsylvania State System of Higher Education (PASSHE). As an instrumentality of the Commonwealth of Pennsylvania, its procurement practices are governed by the Commonwealth Procurement Code (Act 57 and amendments) and other related statutes, rules, regulations and policies.

This guide has been prepared to assist you in your contacts with the University and to familiarize you with the functions of the Procurement Department, Construction Procurement Office, Accounts Payable Department and other departments at the University. We hope this information will help you to better understand our organization and its purchasing procedures. Please do not hesitate to contact us with any suggestions or questions. We look forward to doing business with you.

The Construction Procurement Department has primary responsibility for construction, rehabilitation and renovation procurement and real property transactions (leases, agreements of sale, rentals). It also has responsibility for certain specialty contracts, such as Professional Service Agreements (Architectural, Engineering, Construction Management, etc.), and coordination of open-ended agreements initiated by the State System of Higher Education Construction Support Office.

The Procurement Department has primary responsibility for the purchase of all goods and non-construction services on campus. This includes all categories of supplies, equipment and furnishings. Service contracts and other forms of contracts from this office include, but are not limited to: the provision of Food Service, Interpreter Services, Elevator Service, Library Acquisitions, Maintenance Agreements, Scientific Equipment Service, Consultant Services, Cash Transport, Refuge Collection and Disposal, Specialty Mailing Services, Pest Control, Turf Maintenance, Specialty Software, Graphics and Printing Services and Copier Acquisition/Services, etc.

All businesses are invited to deal with Bloomsburg University. Minority and women owned businesses are encouraged to apply.

WHAT WE PURCHASE:

The dollar volume of Bloomsburg University purchases and contracts is significant. Procurement activity supports academic, administrative, advancement, information technology and student affairs departments. A central receiving and storeroom office on campus augments the procurement and delivery system.

Products and services commonly procured include scientific equipment, office supplies and furnishings, chemicals, repair and service agreements, construction projects, library holdings, art supplies, maintenance parts, automotive supplies, custodial supplies, fuels, and many other educational and plant support items.

The Accounts Payable Department has primary responsibility for verifying the authenticity of payment requests for checks issued by the University. Non-compliant, incomplete, or disputed issues will be referred by this office to the proper officials or returned without action.

BASIC GUIDELINES:

Pcard

Permitted:

- Office, educational, lab, maintenance, custodial and other operating supplies
- Equipment, furniture, or furnishings
- Software and software licenses
- Overnight shipping/courier services such as FedEx, UPS, etc.
- Travel-related expenses for speakers and candidates, such as hotel and transportation
- Seminar/conference registration with no associated travel
- Food, if cardholder has a university food purchasing card



Not Permitted:

- Multiple purchases to the same/similar vendors, in the same time period, with intent of circumventing single transaction limit of \$1,000
- Travel-related expenses for students, faculty and staff
- Service of any type such as:
 - ❖ Honoraria
 - ❖ Consulting services
 - ❖ Repair and maintenance services
 - ❖ Temporary help
 - ❖ Catering services
 - ❖ PayPal
- Miscellaneous
 - ❖ Promotional items and university clothing
 - ❖ Gifts and awards
 - ❖ Flowers
 - ❖ Alcohol
 - ❖ Food (unless you have food purchasing card)
 - ❖ Subscriptions
 - ❖ Memberships
 - ❖ Small electronic equipment such as ipads, epads, ereaders and digital cameras
 - ❖ Desktop and laptop computers and printers
 - ❖ Licenses



Security Code for JPMC customer service

- Birth month & date, not social security #
- Example: Jan. 1 would be 0101

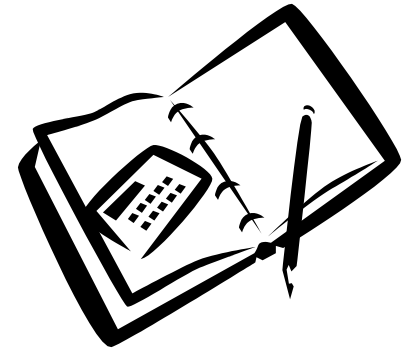
Contacts:

- Reports, Danielle Peters, AP, x4647
- Log on & changes, Evanna Nolte, Procurement, x4313



Accounts Payable (AP) Notes

- Bill To Address on invoices must be:
Bloomsburg University of PA
Accounts Payable Office
400 East Second Street
Bloomsburg, Pa 17815
- Any good or service contracted for and received by the University must have an associated invoice forwarded to AP for payment (Example: Honorariums).
- If an invoice is received either with a shipment or by mail please be sure to sign invoice “*ok to pay*” and send to Accounts Payable, Waller 18.



Annuitants

- **Policy** - Re-employment or contracting for services of a SERS, PSERS, or PASSHE Annuitant is governed by the Commonwealth Management Directive 515.20 and the retirement code.
 - ❖ These rules regulate the limited and unique circumstances under which BU may employ or contract with annuitants.
 - ❖ Contracts with Commonwealth annuitants will not be approved for performing duties the annuitant performed as an employee
 - ❖ An annuitant may render services without loss of annuity in the capacity of an independent contractor for a certain sum and for a specific period of time pursuant to requisite contract approval
- **Actions**
 - ❖ Ask - Is the prospective vendor a PSERS, SERS, PASSHE annuitant? If so, consult with HR prior to initiating a PR/PO.
 - ❖ If approved, enter note with explanation in the text of the PR.

Appendices

A. Material Group Listing, By Special Approver



Appendix A - Material group listing, by special approver

Material Group	Material Group Desc.	Special Approver
00172	DESKTOP PRINTERS	Celli
00180	COPIER-PURC RENT EQ	Celli
00252	COMPUTER SOFTWARE	Celli
00260	COMPUTER HARDWARE	Celli
00108	LIBRARY MATLS SUPP	Librarian?
00116	SUBSCRIPTIONS BOOKS	Librarian?
00124	EQ LIBRARY ARCHIVAL	Librarian?
00908	SRVC-PRINTING PHOTO	Mandel
00100	EDUCATION-MATLS SUPP	None
00148	OFFICE SUPPLIES	None
00156	PAPER-OFFICE PRINTNG	None
00164	TONER_INK	None
00188	MEMBERSHIPS	None
00196	HONORARIUM	None
00204	SPEAKERS ENTERTAINER	None
00212	HOTEL LODGING	None
00220	TRAVEL-EDUCATIONAL	None
00228	CONFERENCE RM MATLS	None
00236	FOOD BEVERAGE PRODS	None
00244	WATER SRVC BOTTLED	None
00268	TECHNICAL ACCESS_STUD	None
00276	LIGHT FIXTURES_BULBS	None
00284	MRO SUPPLIES (Maint Repair Oper)	None
00292	BARRELS DRUMS_KEGS	None
00300	AGRICULTURE	None
00308	ANIMALS ANIMAL SUPP	None
00316	FLOOR-INSTALL M&R	None
00324	WINDOW TREATMENTS	None
00332	FURNITURE-PURCH M&R	None
00340	ELEVATOR-INSTALL M&R	None
00348	EQ_SP_ART_MUSIC_THTR	None
00356	EQ_SP_ATHLETIC	None
00364	EQ_SP_AV_ELECTRONICS	None
00372	EQ_SP_BLDG_MAINT	None
00380	EQ_SP_ELECTRICAL	None
00388	EQ_SP_FIRE_PROTECTN	None
00396	EQ_SP_FRST_AID_SAFTY	None
00404	EQ_SP_HANDICAPPED	None
00412	EQ_SP_HOUSEHOLD_APPL	None
00420	EQ_SP_HVAC	None
00428	EQ_SP_JANITORIAL	None
00436	EQ_SP_LAB_SCIENCE	None
00444	EQ_SP_LANDSCAPING	None
00452	EQ_SP_MATRIAL_HNDLNG	None
00460	EQ_SP_MEDICAL	None
00468	EQ_SP_PAINTING	None
00476	EQ_SP_PARK_PLAYGRND	None
00484	EQ_SP_PLUMBING	None

Appendix A - Material group listing, by special approver

00492	EQ SP POLICE	None
00500	EQ SP RADIO TELEPH	None
00508	EQ SP SECURITY ACCESS	None
00516	EQ SP WATER TREATMNT	None
00524	EQ SP WELDING	None
00532	VEHICLE-PURC PRTS RPR	None
00540	LOGISTICS-DELIVERY	None
00548	APPAREL UNIFORMS	None
00556	PHARMACEUTICALS	None
00564	HAZARDOUS MATERIALS	None
00572	CHEMICALS SOLVENTS	None
00580	GASES-MED RESEARCH	None
00588	FUEL OIL GREASE	None
00596	UTIL ENERGY-COAL	None
00604	UTIL ENERGY-ELECTRIC	None
00612	UTIL ENERGY-NAT GAS	None
00620	UTIL ENERGY-OIL	None
00628	UTIL ENERGY-WOOD	None
00636	WATER SEWAGE	None
00644	RENTAL-GENERAL EQ	None
00652	RENTAL-IT EQ	None
00660	RENTAL-JANITORL EQ	None
00668	RENTAL-OFFICE EQ	None
00676	RENTAL-REAL PROPERTY	None
00684	REAL ESTATE ACQUISIT	None
00692	FEES PERMITS	None
00700	MODULAR/PRE-FAB BLDG	None
00708	CONSTRUCTION-ELECTRC	None
00716	CONSTRUCTION-GENERAL	None
00724	CONSTRUCTION-HVAC	None
00732	CONSTRUCTION-OTHER	None
00740	CONSTRUCTION-PLUMBNG	None
00756	SRVC-BUILDING MAINT	None
00764	SRVC-CATERING BEVRGE	None
00780	SRVC-DOCUMNT STORAGE	None
00788	SRVC-EDUCATIONAL	None
00796	SRVC-ENVIRONMENTAL	None
00804	SRVC-FINANCIAL	None
00812	SRVC-GRNDS LAND SNOW	None
00820	SRVC-HAZARDOUS MATRL	None
00828	SRVC-HR RECRUIT TEMP	None
00836	SRVC-INFO TECHNOLOGY	None
00844	SRVC-JANITORIAL	None
00852	SRVC-MAILING	None
00860	SRVC-MEDICAL HEALTH	None
00868	SRVC-MOVE RELOCATION	None
00876	SRVC-OFFIC EQ REPAIR	None
00884	SRVC-OTHER EQ REPAIR	None
00892	SRVC-OTHER PROF	None
00900	SRVC-PEST CONTROL	None
00916	SRVC-PROF DESIGN	None
00924	SRVC-REAL ESTATE	None
00932	SRVC-REFUSE RECYCLE	None
00940	SRVC-SECURITY	None
00948	SRVC-SIGN LANGUAGE	None
00956	SRVC-TRANSPORTATION	None
00964	SRVC-UTIL ENRGY FUEL	None
00132	SIGNS FLAGS BANNERS/(LOGOS)	McGuire
00140	PROMOTIONAL PRODUCTS	Rush
00748	SRVC-ADVERTISING	Rush
00772	SRVC-COMMUNICATION	None