eProcurement: Special Item Request Guide

Valdosta State University

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eProcurement Special Item Request Guide

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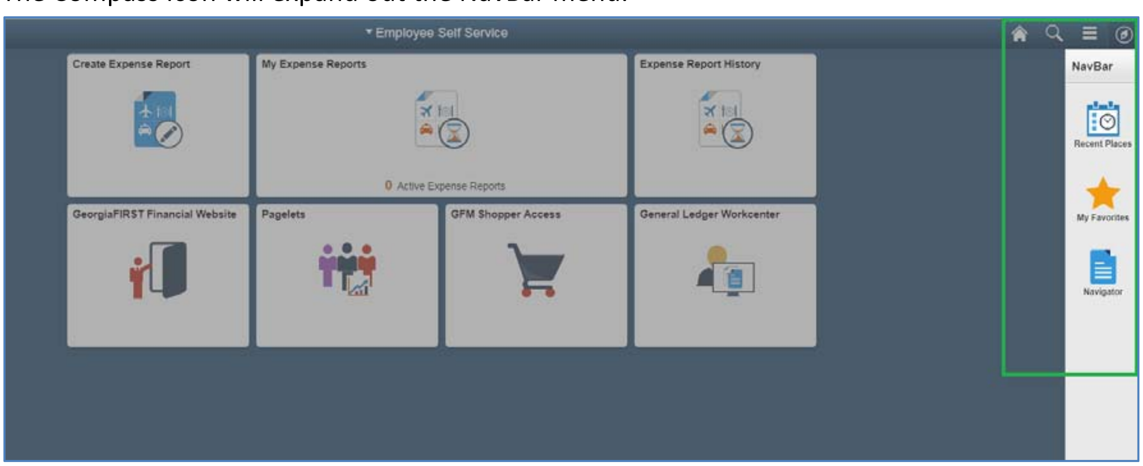
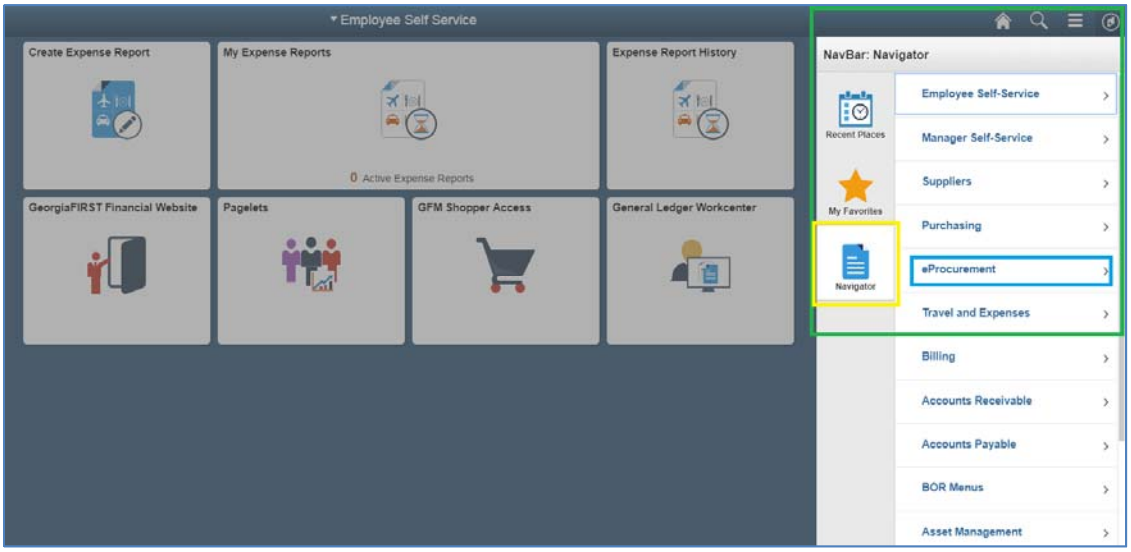
Getting Started

1. Your Employee Self Service account must be created before you can access PeopleSoft Financials.
2. To establish your login information, you must have already completed eProcurement Training. After training Computer Service in Financial Services will automatically send you an email with you login information.
3. To access PeopleSoft Financials open your web browser and navigate to the following link: https://core.fprod.gafirst.usg.edu/psp/fprod/EMPLOYEE/ERP/?cmd=logout
   a. Chrome and Firefox work best, but Explorer will also work if you have the most updated version of the browser. Experiment to see which one works best for you.
4. Alternatively, PeopleSoft Financials can also be accessed through your 'My VSU' page, right menu, 7th link down from the top of the list.
5. See Appendix A on how to view and review authorized active Statewide Contracts.

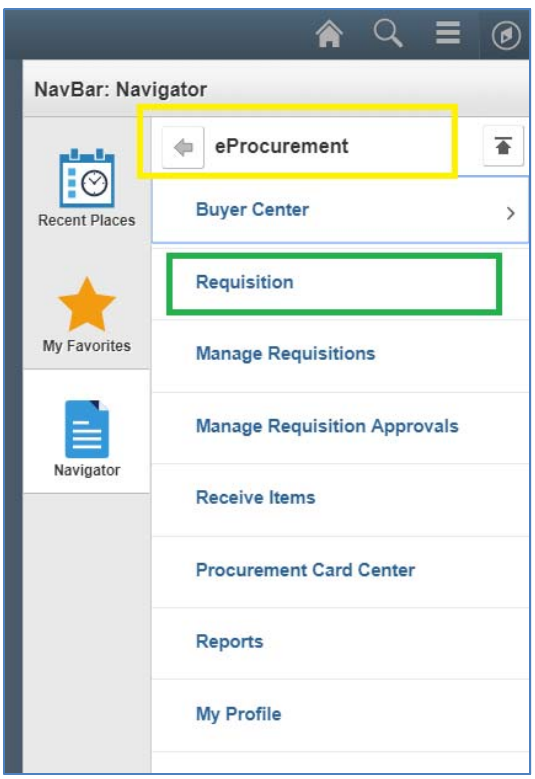
Navigating to eProcurement

1) Upon initial login to PeopleSoft Financials you will see the Fluid Dashboard. In the top right you will see (in order left to right) the home icon, magnifying glass icon, menu icon, and compass icon.
   a) The Home Icon will always bring you back to the Fluid Dashboard.
   b) The Magnifying Glass Icon will allow you to search the entire Financials module.
   c) The Menu Icon will allow you to personalize your layout and add favorites to your NavBar
   d) The Compass Icon will expand out the NavBar menu.

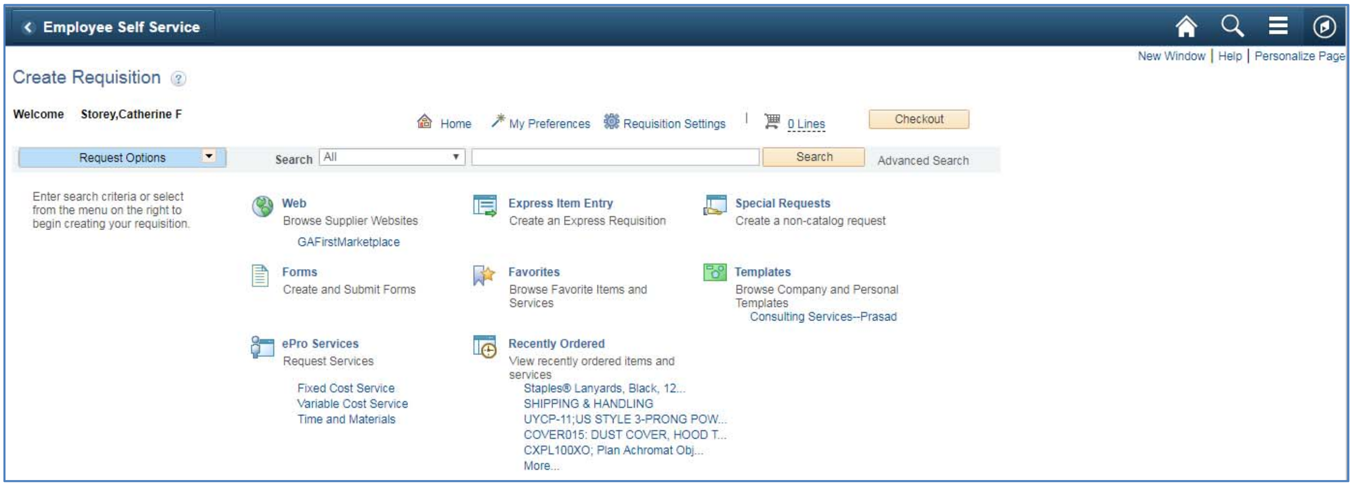




2) To access eProcurement for both Marketplace orders and Special Item Requests, you will click the Compass Icon to expand the NavBar Menu. From here you can see the Recent Places Icon (will show you the most recent links you've visited in PeopleSoft Financials), the My Favorites Icon (shows the links you've added to your favorites list), and the Navigator Icon (shows you the full navigation menu).
   a) Click on the Navigator Icon. The eProcurement link should be towards the top of the Navigation Menu.

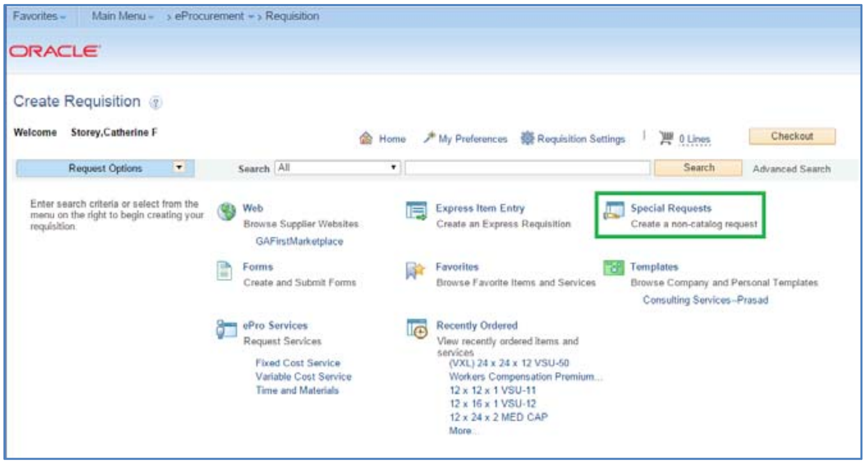


3) Click the eProcurement link in order to expand out the eProcurement menu. You will see that the top Menu header now says "eProcurement". From there, click on the Requisition link in order to create either a Marketplace Order or a Special Item Request.

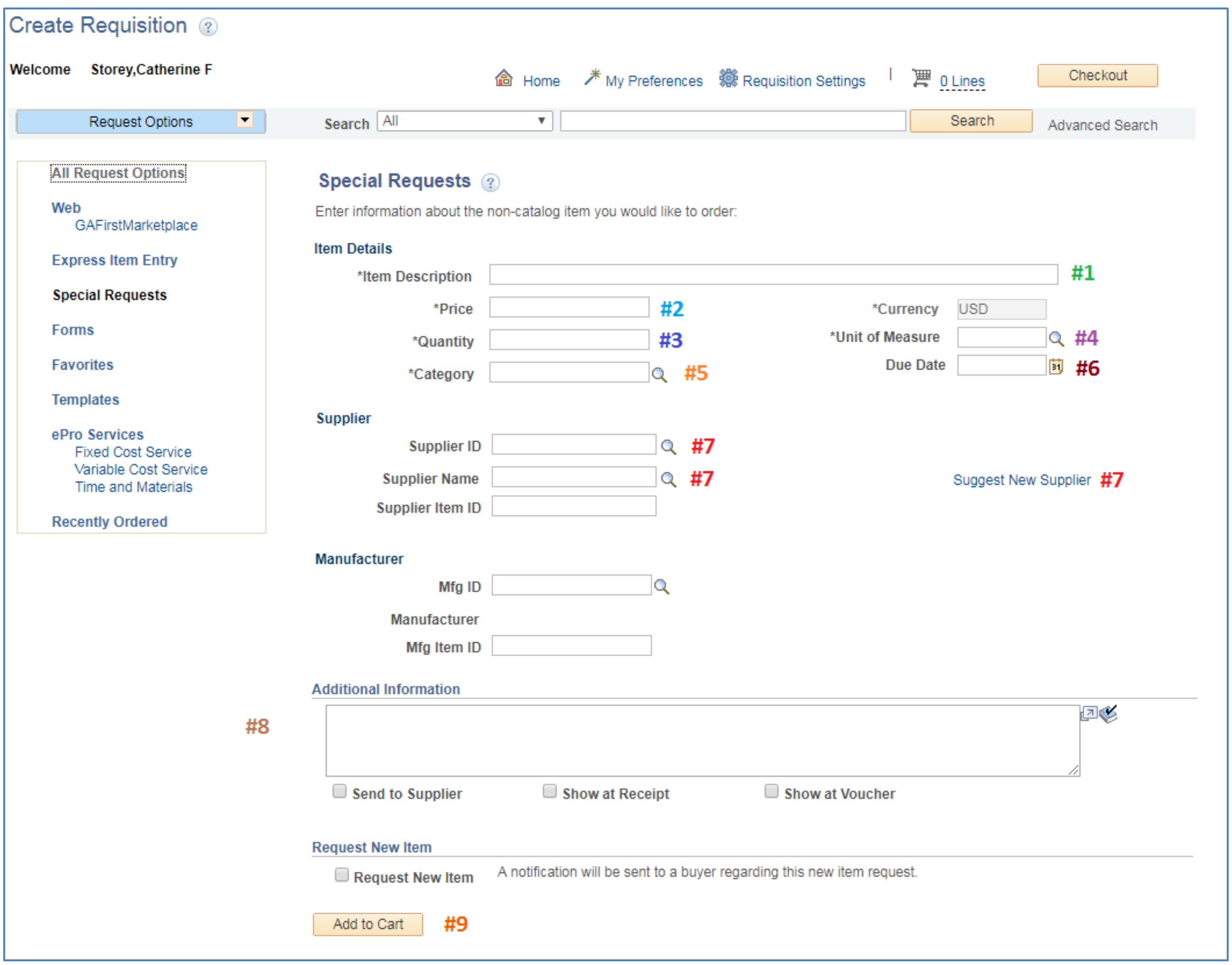


4) From the “Requisition” link the system routes to the Create Requisition page. This will is the starting point for creating both types of requisitions.

STEP 1: ADD ITEMS



1. Access eProcurement by navigating through
   a. NavBar>Navigator>eProcurement>Requisition
2. Always use a separate requisition for each supplier. Do NOT submit a request with multiple suppliers.

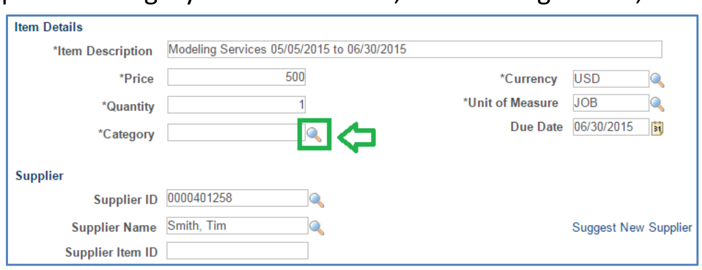


The Special Requests page will require 8 fields to be complete before adding a line to the cart.

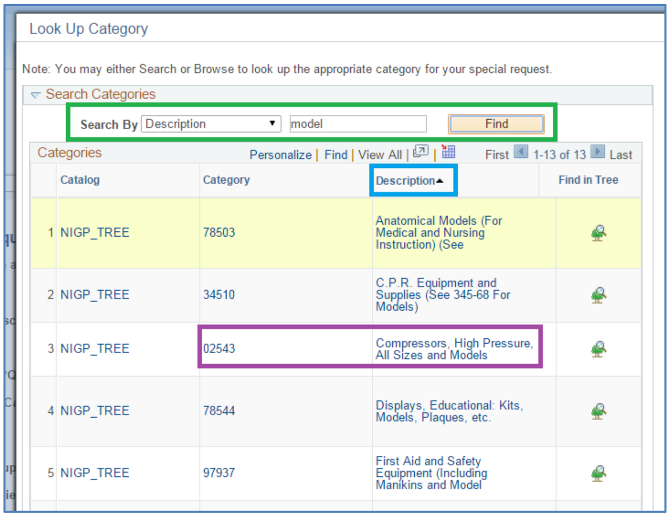
a. #1 Item Description
b. #2 Price

   c. #3 Quantity
   d. #4 Unit of Measure
   e. #5 Category
   f. #6 Due Date
   g. #7 Supplier ID/Name or Suggest New Supplier
   h. #8 Notation of Budget Chart String being used
   i. #9 clicking Add to Cart

3. Enter a description in the Item Description field.
   a. Be brief yet thorough.
   b. Include period of performance, start date and end date if procuring a service.
   c. Include part/item/model number if procuring a good or item.
4. Enter the price in the Price field.
   a. If procuring a service, give a total amount. Do not break the Price down by hour/day/week.
   b. If procuring a good, give the price per each item. Do not give a lump sum for all items.
5. Enter quantity in the Quantity field.
   a. For services, always put one (1) in the quantity field.
   b. For goods, break the quantity down according to how it was quoted by the supplier.
6. When completing the Unit of Measure field note that Buyers cannot change this field. Please use discretion when choosing a Unit of Measure. When in doubt, contact your buyer.
   a. For services, use either Job, Fee, or YR (year).
   b. For goods/items, click the magnifying glass to the right of the Unit of Measure field and select the correct type of Unit of Measure as quoted by the supplier.
   c. Example: If the supplier quotes the items being sold per package, select package as the unit of measure.
7. Enter the category number in the Category field. There are 4 ways to search for a Category number. Peoplesoft Category Search Function, NIGP Listing search, NIGP Key Word search, NIGP Exempt List.

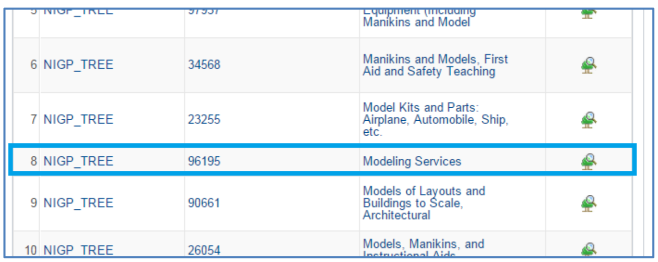


   a. The Peoplesoft Category Search Function:
      i. Click on the magnifying glass next to the Category field to go to the Look-Up Category page.



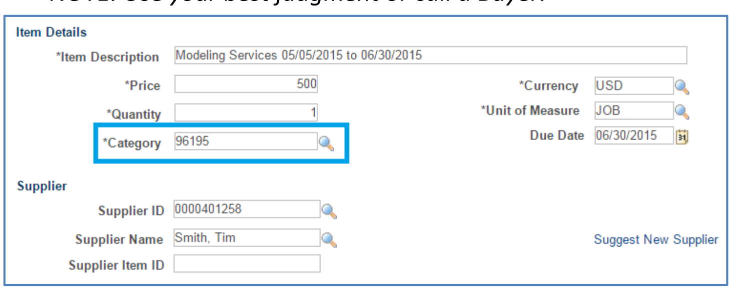
ii. On the Look Up Category page,

- ✓ Change the ‘Search By’ to Description, not Category (green box).
- ✓ Enter a one word description in the description field and click Find (green box).
- ✓ Alphabetize the search results by click the Description header (blue box).
- ✓ The category number and category description will appear in the search results (purple box).



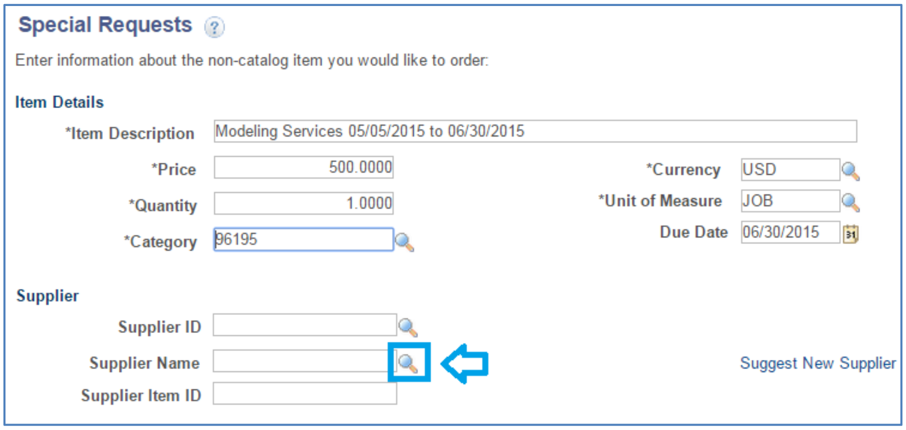
iii. Click the blue linked 5 digit category number of the description that is as close as possible to being accurate for what is being purchased.

- ✓ *NOTE: Use your best judgment or call a Buyer.*

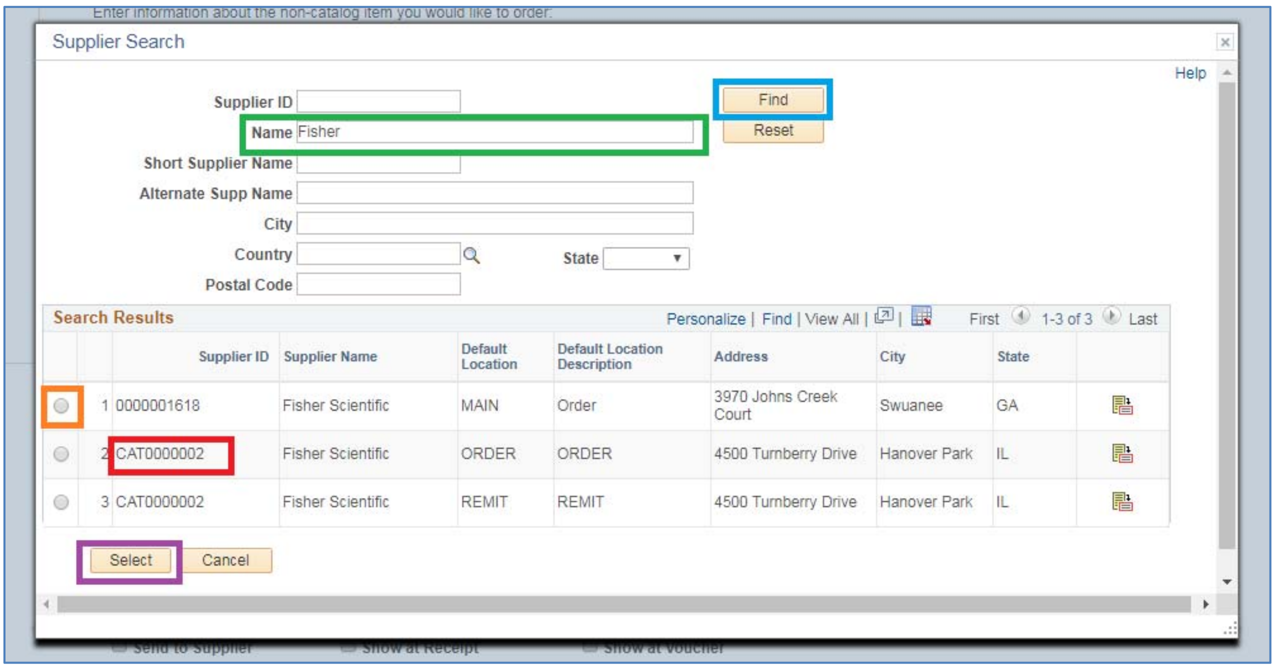


iv. By clicking the blue linked 5 digit category number; the system will automatically insert the number into the Category field.

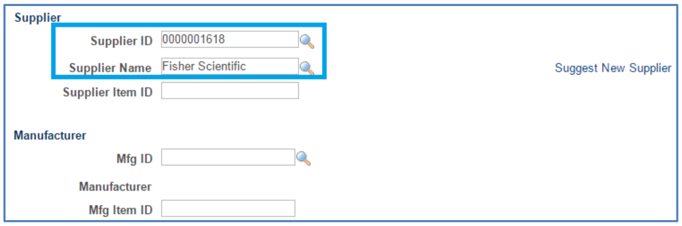
- ✓ Directions to access a full list of category codes and exempt category codes is also provided at the end of this manual in Appendix B.
- ✓ Reference the attached PowerPoint for more information on choosing a category number. Appendix C.
- ✓ Supplemental list of commonly used IT category codes is attached to the end of this hand out in Appendix D.



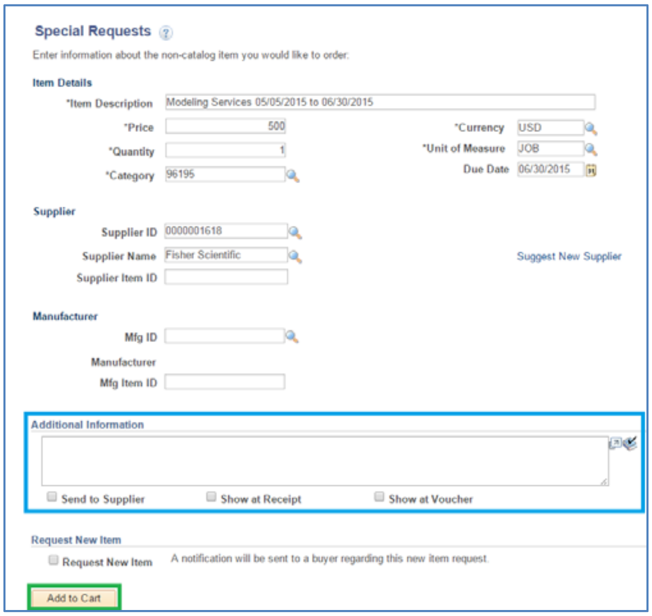
1. To enter Supplier information:
   a. To select an existing supplier click on the magnifying glass next to the Supplier Name field (blue box).



   b. A pop-up window will appear, type the name of the supplier in the Name field (green box) and click the yellow Find button (blue box).
      i. Note: Do note enter the full name of the supplier. Enter one word of the supplier name.
         - ✓ Example: If you are searching Fisher Scientific, only enter Fisher or Scientific. You may not know how the supplier is entered into the system, so one word of the supplier name will bring up more search results than entering the full name.
      ii. *Note: in the search result, do **not** select a Supplier Name or ID that begins with CAT (red box).*
   c. If the supplier list does not have the current address for the company, it is best to get a supplier form completed and returned to Procurement. Found here: https://www.valdosta.edu/administration/finance-admin/financial-services/procurement/
   d. Suppliers that have been inactivated will not show up in the search. It is best to get a supplier form completed and returned to Procurement.



e. After clicking on the Supplier ID number - the system will route back to the Create Requisition page. The Supplier ID number and Name will be automatically filled.

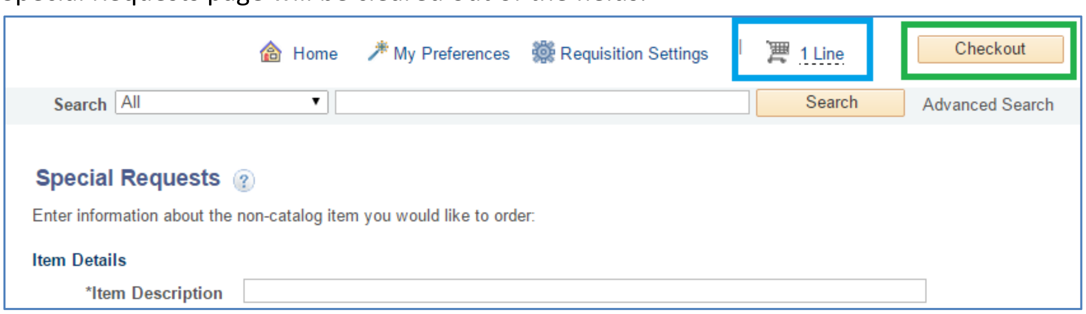


f. In the Additional Information comment box, enter the Budget Chart String that will be used for this line. If entering multiple lines for one supplier, and the same Budget will be used for all lines – it only needs to be notates on the first line's Additional Information comment.

   i. Also - include any special instructions that pertain to that one line item in the Additional Information Comment box as well.

g. Review all of the information entered, once everything is correct, click Add to Cart.

h. Don't be alarmed! After clicking "Add to Cart" all of the information that was just typed up on the Special Requests page will be cleared out of the fields.

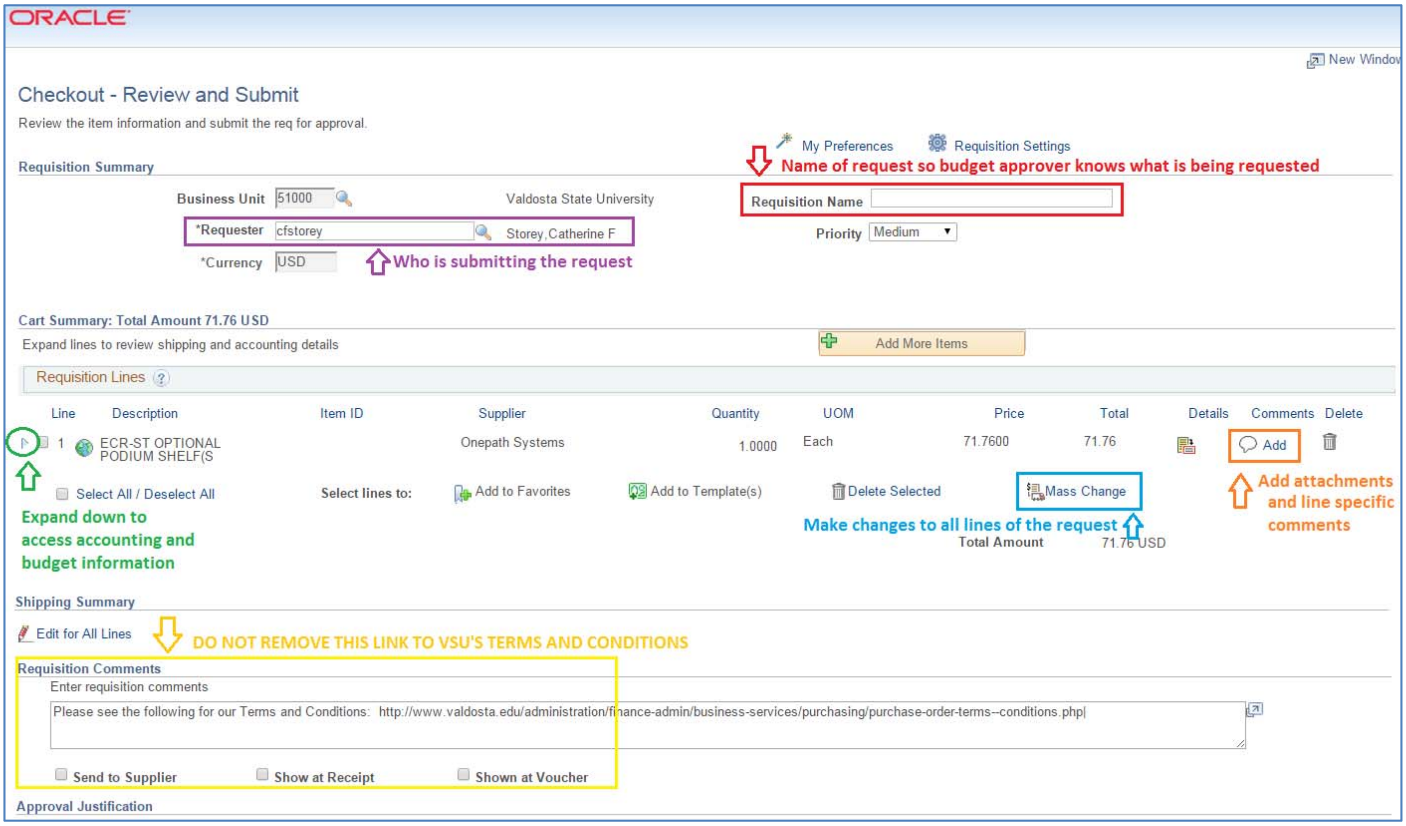


i. After adding a line to the requisition, it will show up in the cart in the top right hand of the page. If there are multiple lines, a total of all lines will show up in the cart (blue box) after clicking "Add to Cart" after you've entered each line.

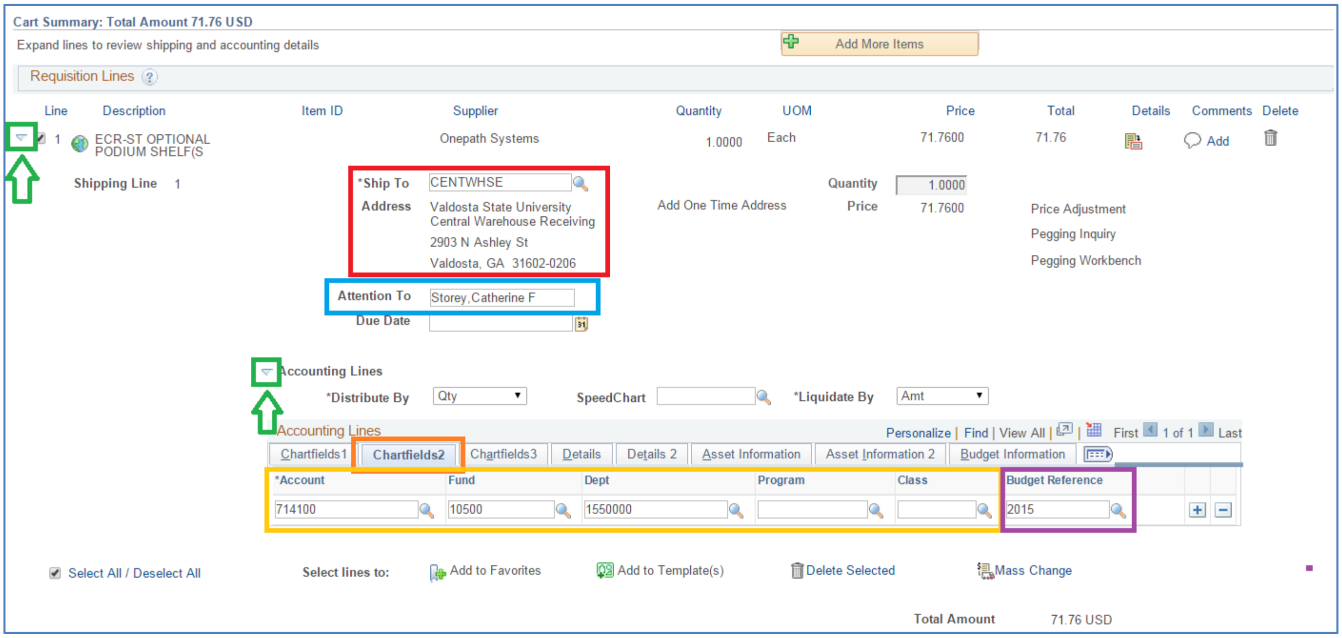
j. From here either enter more lines, using the same process and clicking Add to Cart after every line item or click the yellow Checkout button in the top right next to the cart icon. Clicking the checkout button will route the system to the Checkout-Review and Submit.

   i. *Note: you cannot put both Marketplace and Special Item requests on the same submission.*

STEP 2: REVIEW AND SUBMIT



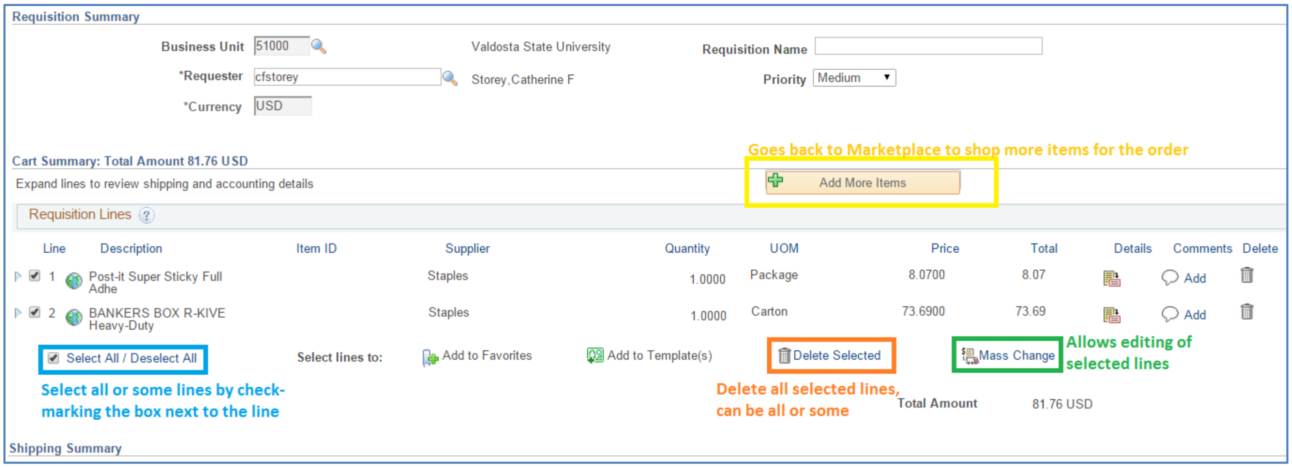
1. Once the yellow 'Checkout' button has been selected, the system routes to the 'Checkout - Review and Submit' page where the following have been made accessible:
   a. Requisition Name (red box) needs to be completed. This needs to be a naming convention that denotes the date the request is submitted and what type of order the request is for.
      i. Ex: 04/05/2018 Modeling Services
      ii. The 'Requisition Name' field will only allow for 30 characters including spaces.
   b. Requester (purple box) will be the username of the requester creating and submitting the request.
   c. Comments bubble (orange box) is where all attachments will be added.
      i. Add ALL attachments to line 1. Do not add the same attachments on all lines. Once is enough.
      ii. Add as many attachments as needed.
      iii. Add all documentation that is required –new supplier forms, quotes, contracts, membership invoices, etc.
   d. Mass Change (blue box) will allow changes to be made to all or some lines of a multi-line request. Changes such as:
      i. Accounting(aka Budget) information: Fund, Department, Program, Class, Budget Reference
      ii. Ship-To
      iii. Attention-To
   e. Expansion Triangle (green circle) will expand down to view more information about the request. Information such as:
      i. Ship-To Address
      ii. Attention-To
      iii. Accounting (aka Budget) Lines
   f. Requisition Comments (yellow box) does NOT need editing. Leave this box as it appears by default.



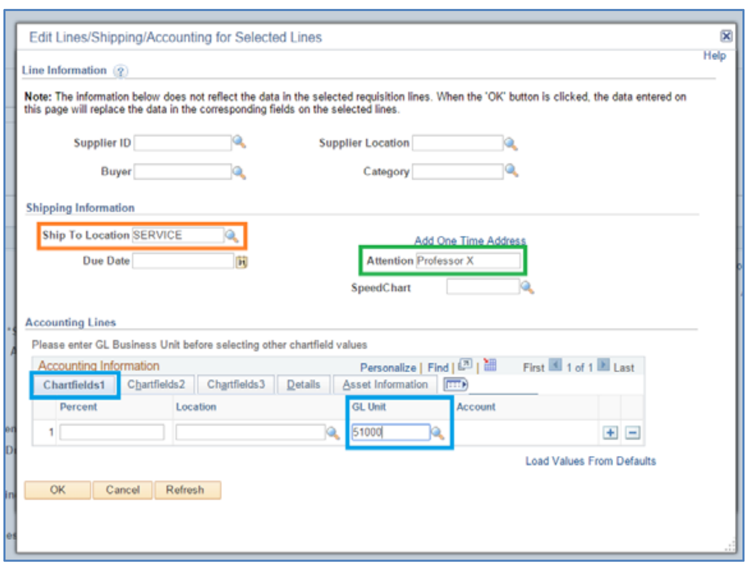
2. The Expansion Triangles are very important (green boxes).
3. The Line Expansion Triangle is the small white triangle located to the left of the line description; it expands down the ship-to and attention-to information.
   a. *Note: use the Expansion Triangle at the line level when there is only one line. If there are multiple lines, use the Mass Change feature explained further down in this walk-through document.*
   b. Ship-To: The only times the Ship-To should be changed is if equipment is being installed by the supplier or dealer, if the procurement is for a service, or if the purchase is for an internet item/service.
      i. Ex 1: Professor M is requesting a large desk for their office. The ship-to should be changed from Central Warehouse to Department and a note in the comments as to which room to deliver to.
      ii. Ex 2: Ms. Smith is having a speaker give an honorarium. The ship-to should be changed from Central Warehouse to Services.
      iii. Ex 3: Mr. Wilson is renewing the school's institutional membership to an online database. The ship-to should be changed from Central Warehouse to Internet.
      iv. When in doubt – contact a Buyer or Central Warehouse.
   c. Attention-To: Be sure to enter the person's name who will be the most knowledgeable about what is being ordered into the Attention-To field.
      i. Ex 1: Professor X needs a microscope. The professor would ask a department Requester to submit the order for approvals through ePro since the professor is not a Requester themself. The Requester would enter Professor X's name into the Attention-To field since the Professor knows more about the microscope being ordered than the Requester does.
      ii. Ex 2: Ms. Lee needs office supplies and is a departmental requester. Since she is submitting the request for the office supplies herself, she would enter her name in the Attention-To field.
4. The Accounting Expansion Triangle is the small white triangle located below the Attention-To field. This triangle is to access and to edit accounting/budget information for one just that line.
   a. The additional information that drops down after clicking the Accounting Expansion Triangle will automatically open up to the accounting tab labeled Chartfields1.
   b. There is nothing that needs to edited on the Chartfields1 tab. Click on the Chartfields2 tab.
   c. The Account Number has been pre-determined based upon the category code for each line. *Do **NOT** change the account number unless a Buyer or Asset Management has given directions otherwise.*
   d. On the Chartfields2 tab fill in the Fund, Dept, Program, Class and Budget Reference fields.

i. Budget Reference will be the current Fiscal Year and should be automatically filled – do not change the Budget Reference unless directed by a Buyer, Budget Services, or Financial Services.

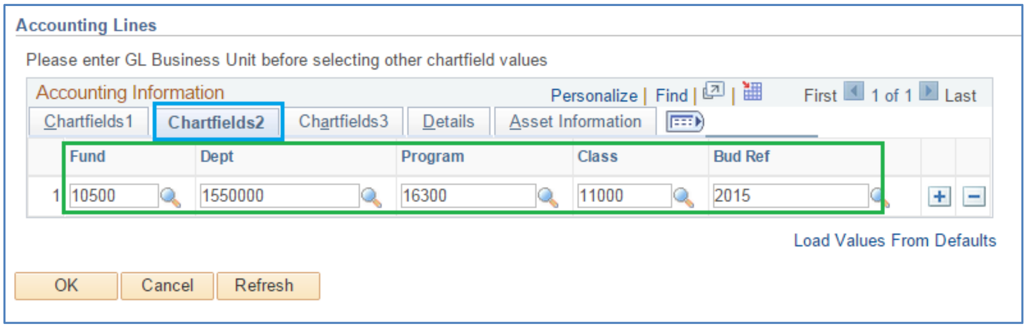
e. If there is a grant – click the Chartfields3 tab and enter the grant or PPV number in the Project field.



5. To add more lines to the order, click the yellow Add More Items button (yellow box) to be taken back to the Create Requisition page.
   a. Remember, only one supplier per request and do not mix Marketplace and Special Requests on the same order.
6. To delete all or some lines, select the check box to the left of the lines needed or select the blue Select All/Deselect All box (blue box), then click the blue Delete Selected link (orange box).
7. To edit the Accounting (budget) information, Ship-To and Attention-To for multiple lines, select the check box to the left of the lines needed or select the blue Select All/Deselect All box (blue box), then click the Mass Change (green box) button.

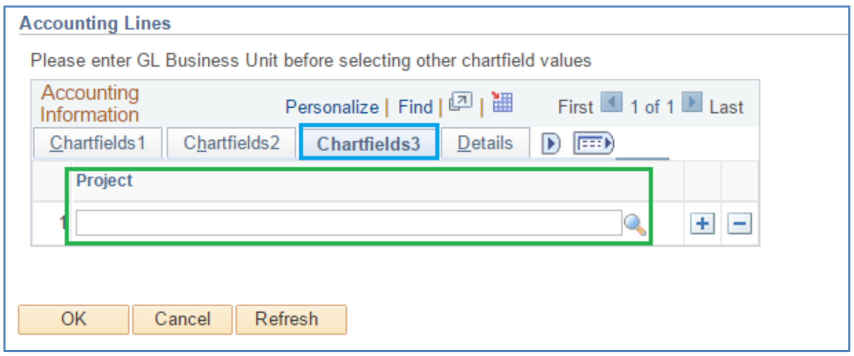


8. On the “Edit Lines/Shipping/Accounting for Selected Lines” pop-up:
   a. To change the Ship-To (orange box), click the magnifying glass to the right of the Ship-To field and select the appropriate ship to or the ship to that has been directed to be used by a Buyer or Warehouse.
   b. If the Attention-To person is not the requester, type the Attention-To person’s name in the Attention field (green box). Leaving the Attention field blank, will cause the field to default to the requester’s name.
   c. On the Chartfields1 tab, enter 51000 into the GL Unit field. 51000 is VSU’s GL (general ledger) and Business Unit number (blue boxes).



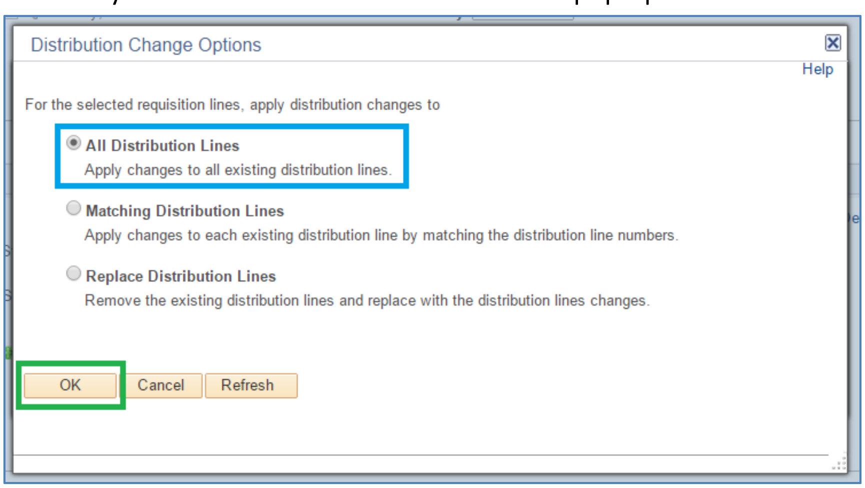
d. On the Chartfields2 tab, enter the Fund, Department, Program, Class and Bud Ref (budget reference aka fiscal year).

   i. The Bud Ref will be the current fiscal year, such as 2018 or 2019. Do not use a past year Bud Ref unless directed by a Buyer or Financial Services.



e. For grants or PPV's, go to the Chartfields3 tab (blue box) and enter the grant or PPV number in the Project field (green box)

f. Click the yellow OK button at the bottom of the pop-up window.

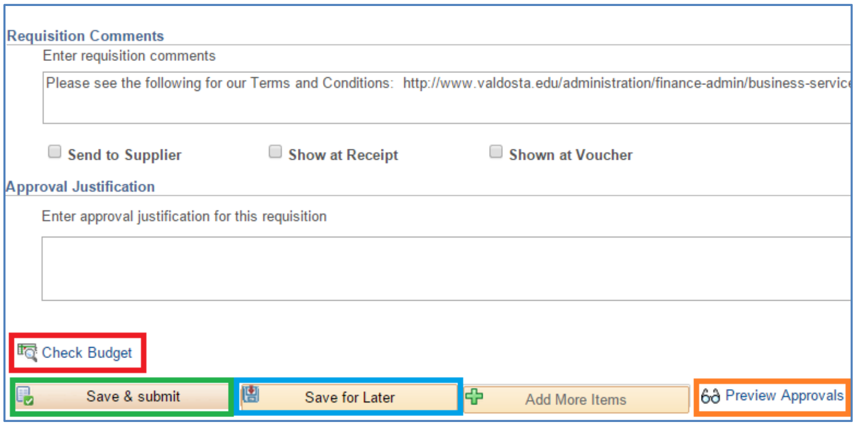


g. The system will ask to apply changes to all existing distribution lines; this will apply the changes to only the lines that were selected before the Mass Change link was clicked.

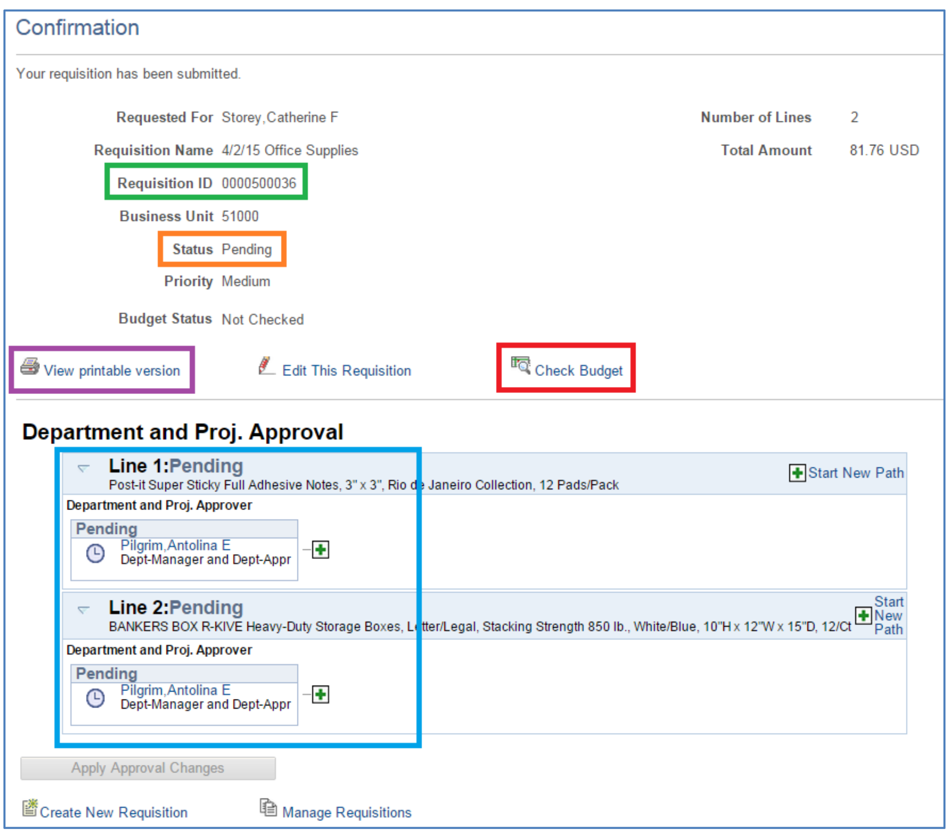
   i. Always leave the "All Distribution Lines" options selected.

h. Click the yellow OK button at the bottom of the pop-up window.

i. Changes will be applied to all selected lines.



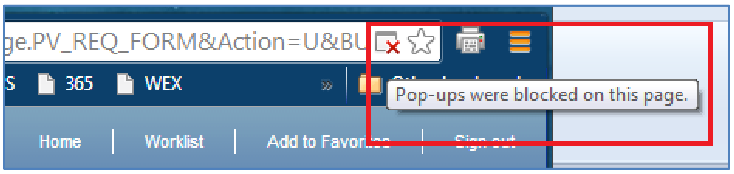
9. Scroll to the bottom of the Checkout-Review and Submit page.
10. **<u>DO NOT</u>** click the blue Check Budget link (red box). It literally does nothing. This issue is being worked on at the State level currently.
11. To preview the approvals, click the blue Preview Approvals link (orange box).
    a. *Note: clicking the blue Preview Approvals link will save the request in an Open Status and will assign a Requisition ID. This does <u>NOT</u> submit the request for approvals.*
12. To save work to finish later, click the Save for Later button. This will save the request in an Open Status – which means it has <u>*NOT*</u> been submitted for approvals.
    a. *Note: Clicking Save for Later, only saves the request. Clicking Preview Approvals saves the request AND lets you preview the approvals. The only difference between the two is the pop-up window that displays with the approvers names when you click Preview Approvals.*
13. To submit the request to the budget approver, click the Save & Submit button.



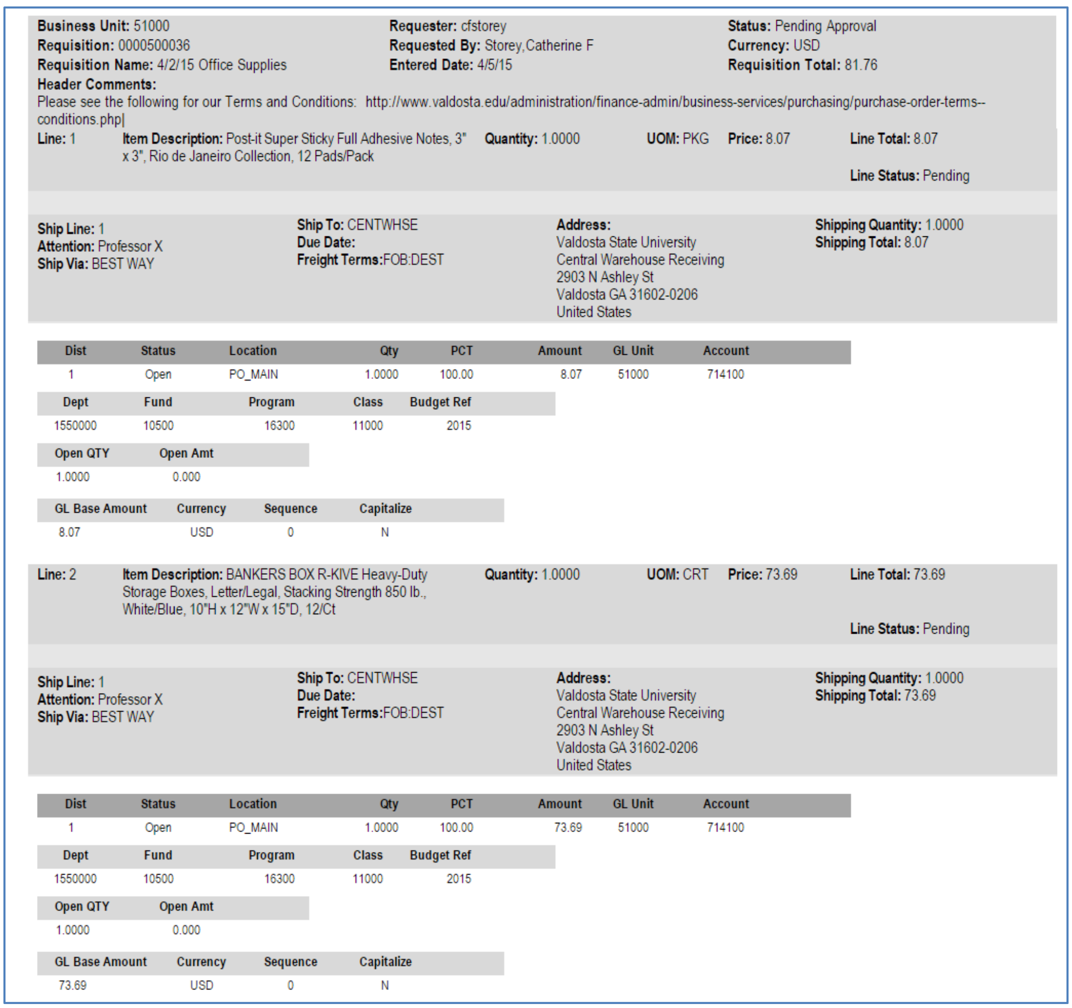
14. Once the Save & Submit button has been clicked, the system routes to a Confirmation page which lists:
    a. Requisition ID number (green box)
    b. Requisition Status (orange box)

c. Who the request was sent to for approvals (blue box)
d. View printable version link (purple box)
e. **<u>DO NOT CLICK</u>** the Check budget link (red box)

15. Occasionally there will be additional approvers. These are system generated and are not optional.
    a. Some additional approvals include:
        i. <u>Amount Approval:</u> routes assets being purchased to Asset Management for review. This approval will be added based on the price.
        ii. <u>IT Approval</u>: routes to IT for technology items and is added based on the Category number.
16. It is a best business practice to keep a copy of the request for departmental records.
    a. Click the View Printable Version link in the middle of the page on the left hand side (purple box).
    b. A pop-up page/new browser window will appear.



c. *Note: If you have pop-up blocker on; be sure to allow pop-ups for Peoplesoft Financials.*



Business Unit: 51000
Requisition: 0000500036
Requisition Name: 4/2/15 Office Supplies
Requester: cfstorey
Requested By: Storey,Catherine F
Entered Date: 4/5/15
Status: Pending Approval
Currency: USD
Requisition Total: 81.76
Header Comments:
Please see the following for our Terms and Conditions: http://www.valdosta.edu/administration/finance-admin/business-services/purchasing/purchase-order-terms--conditions.php|

Line: 1 **Item Description:** Post-it Super Sticky Full Adhesive Notes, 3" x 3", Rio de Janeiro Collection, 12 Pads/Pack **Quantity:** 1.0000 **UOM:** PKG **Price:** 8.07 **Line Total:** 8.07
Line Status: Pending

Ship Line: 1
Attention: Professor X
Ship Via: BEST WAY
Ship To: CENTWHSE
Due Date:
Freight Terms:FOB:DEST
Address:
Valdosta State University
Central Warehouse Receiving
2903 N Ashley St
Valdosta GA 31602-0206
United States
Shipping Quantity: 1.0000
Shipping Total: 8.07

Dist	Status	Location	Qty	PCT	Amount	GL Unit	Account
1	Open	PO_MAIN	1.0000	100.00	8.07	51000	714100

Dept	Fund	Program	Class	Budget Ref
1550000	10500	16300	11000	2015

Open QTY	Open Amt
1.0000	0.000

GL Base Amount	Currency	Sequence	Capitalize
8.07	USD	0	N

Line: 2 **Item Description:** BANKERS BOX R-KIVE Heavy-Duty Storage Boxes, Letter/Legal, Stacking Strength 850 lb., White/Blue, 10"H x 12"W x 15"D, 12/Ct **Quantity:** 1.0000 **UOM:** CRT **Price:** 73.69 **Line Total:** 73.69
Line Status: Pending

Ship Line: 1
Attention: Professor X
Ship Via: BEST WAY
Ship To: CENTWHSE
Due Date:
Freight Terms:FOB:DEST
Address:
Valdosta State University
Central Warehouse Receiving
2903 N Ashley St
Valdosta GA 31602-0206
United States
Shipping Quantity: 1.0000
Shipping Total: 73.69

Dist	Status	Location	Qty	PCT	Amount	GL Unit	Account
1	Open	PO_MAIN	1.0000	100.00	73.69	51000	714100

Dept	Fund	Program	Class	Budget Ref
1550000	10500	16300	11000	2015

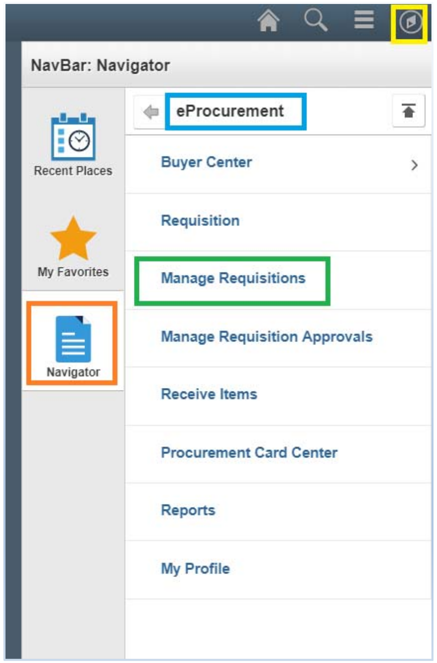
Open QTY	Open Amt
1.0000	0.000

GL Base Amount	Currency	Sequence	Capitalize
73.69	USD	0	N

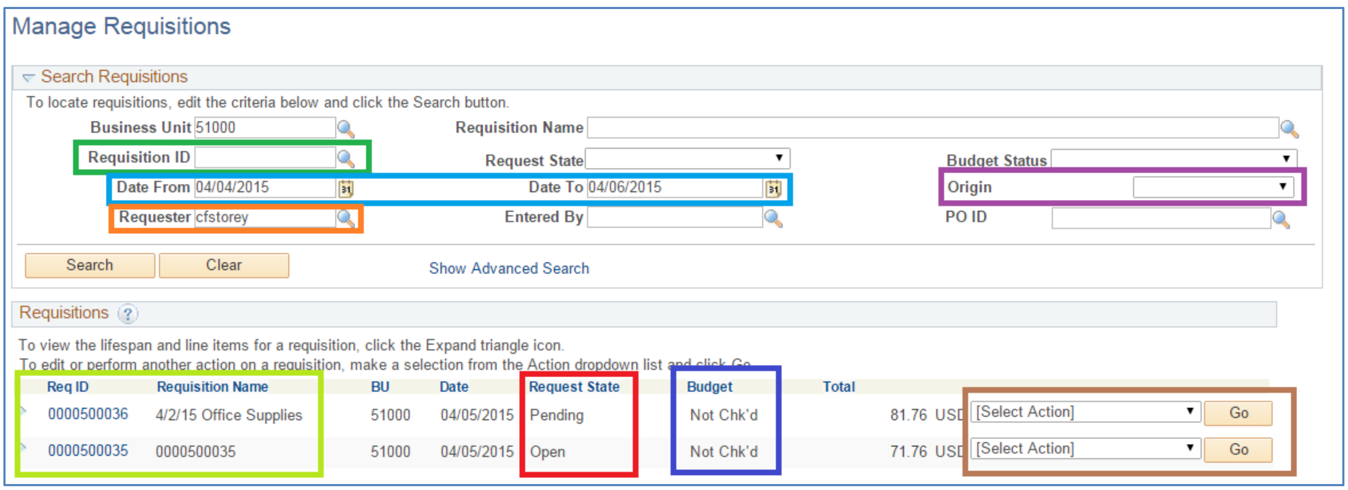
d. A screen shot of the Print Preview that results is above.
    i. *Hint- when printing, it is helpful to print a copy to Adobe PDF instead of printing a physical hardcopy. This will give an electronic copy for records and cut down on paper costs for the university as well as further the University's goal of being a green-friendly campus. If hard copy is needed though, feel free to print it out.*

MANAGING A REQUISITION

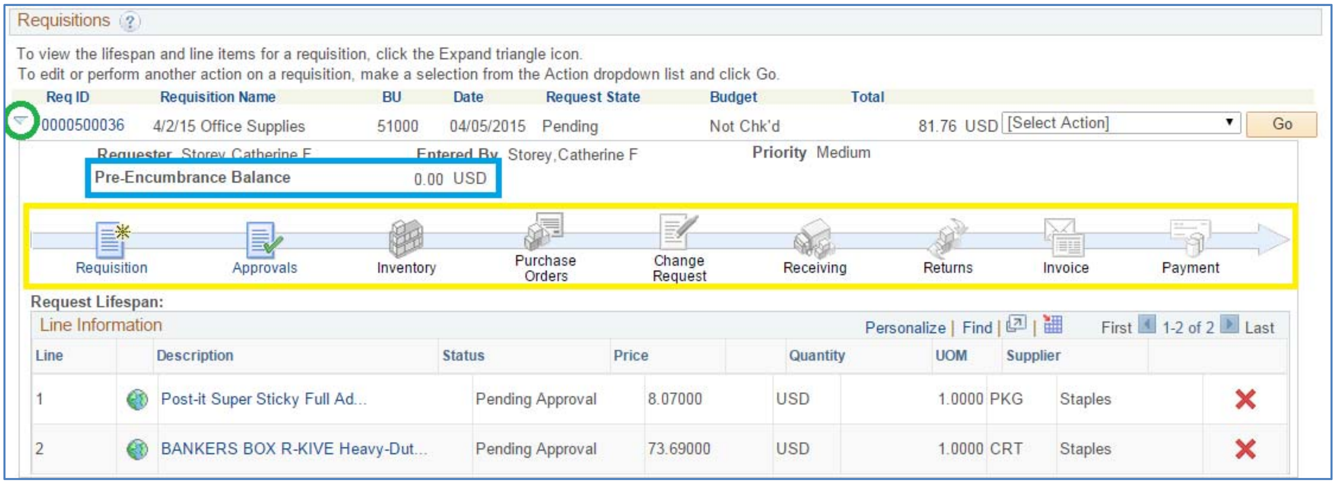
1. As long as the Request has not been sourced to a PO, the requisition can be edited.



2. When editing a requisition go through NavBar>Navigator>eProcurement>Manage Requisitions.

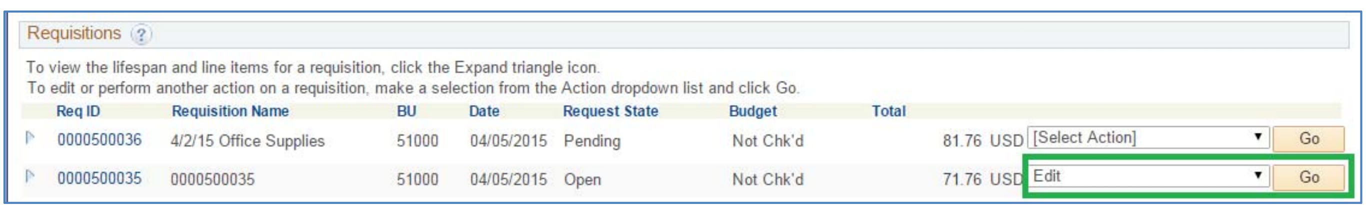


3. ALWAYS leave the Business Unit as 51000.
   a. If this number is changed or cleared out, no data will return when the search button is clicked.
4. The Manage Requisitions page gives several search functions.
   a. Requisition ID (green box)
   b. Date From and Date To (blue box), if the date of submission is known
   c. Origin (purple box), such as Marketplace or Special Request
   d. The requester name will auto-populate in the Requester field (orange box), but can be changed.
5. The Manage Requisitions page also gives a lot of information about the requisition.
   a. Req ID and Requisition Name(light green box)
   b. Available actions to take for the request (brown box); i.e. what can be done with the request.
   c. Request State (red box), i.e. where the request is at in the process.
   d. Budget, which is actually the Budget Status (dark blue box), i.e. if the request has passed budget check.



6. When the Expansion Triangle (green circle) is selected to the left of the Requisition number, more information is expands down below the Requisition name.
   a. The Pre-Encumbrance Balance (blue box) – this will remain at 0.00 until Budget status is valid.
   b. The Lifespan of the request (yellow box).
      1. If an icon in the Lifespan is greyed out, the request has not arrived at that point in the cycle yet.
      2. If an icon has been made available/colorized, the request has made it to that point in the cycle.
      3. Clicking on an icon that has been made available will route to a summary page of that point in the cycle. I.e. the Purchase Orders icon will route to a summary of information and give the PO number.

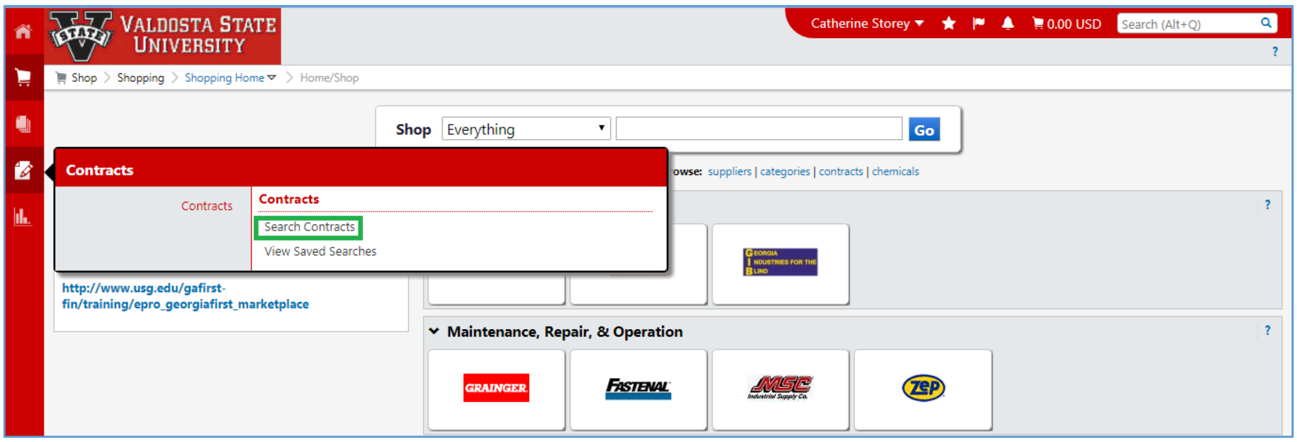
EDITING A REQUISITION



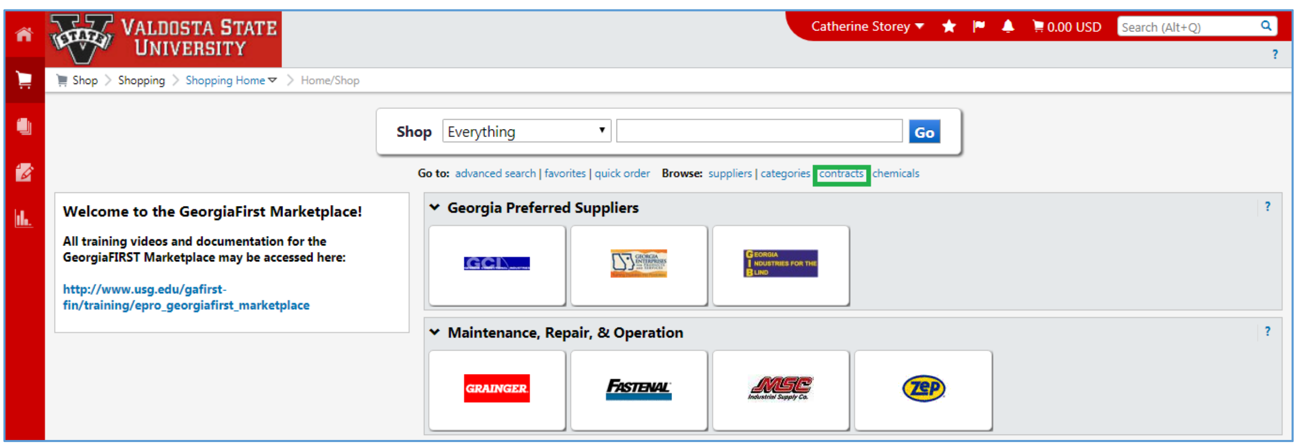
1. To edit an Open, Pending or Approved request,
   a. Click the drop down menu to the far right of the requisition summary line. This drop down menu gives options such as cancel the request, edit the request, and more.
   b. Select the Edit Option and click Go.
2. The system will route to the Review and Submit page of the requisition. Edit the request as needed such as:
   a. Change description, quantity, amount, supplier; by clicking on the actual line description
   b. Attach and/or delete documents
   c. Add lines by clicking the yellow "Add More Items" button
   d. Change Budget Chart Strings, Attention-To, Ship-To
   e. Submit or re-submit for approvals
7. To cancel a request choose Cancel instead of the Edit option in the drop down menu on the Manage Requisitions page and click GO.
8. Peoplesoft Financials automatically runs a budget check every 2 hours. When a request is canceled, the system will budget check and release the pre-encumbrance back to the budget.

Appendix A: Accessing Statewide Contracts

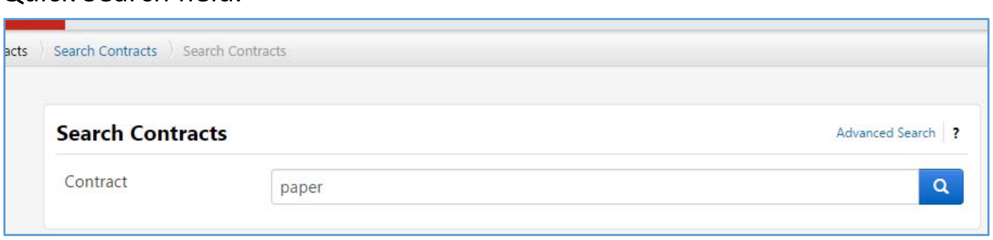
1. Whether entering a GaFirst Marketplace or a Special Item request, the Statewide Contracts will be accessed through the GaFirst Marketplace. This list is comprehensive and the State is continually updating as contracts are renewed, inactivated, and added.
2. There are two ways to access Statewide Contracts.
   a. The first being through the left hand menu. Click on the 4th Icon down (piece of paper with a pencil) to extend out the Contracts menu. Click on Search Contracts.



   b. The second route to access Statewide Contracts is via the direct link on the Marketplace landing page. Both links will route you to the same search page.



3. Once in the GaFirst Marketplace, click the blue Contracts Link which is right below the Quick Search field.

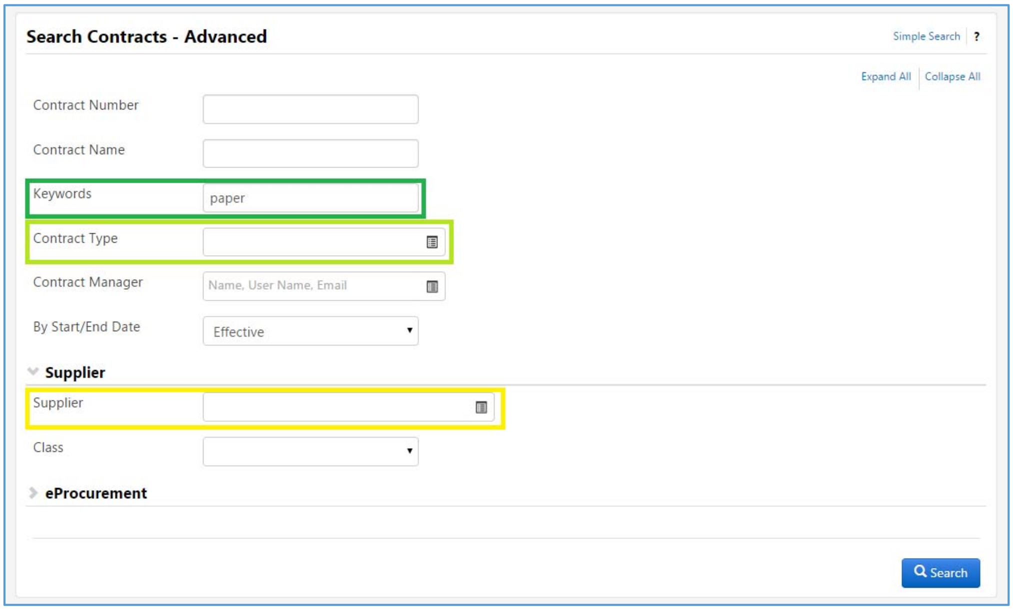


4. To Search Contracts.
   a. There is a basic search and an advanced search.

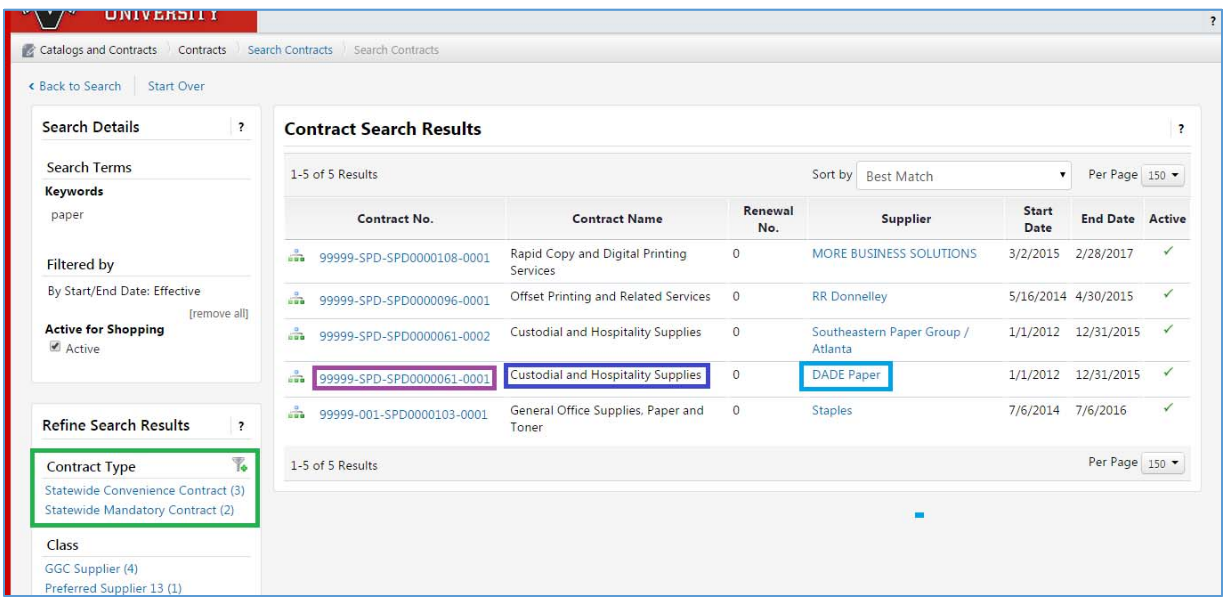
Appendix A: Accessing Statewide Contracts

b. Basic Search – search by keyword or description, such as the word “paper” (do NOT order paper through Marketplace).

c. Advanced Search



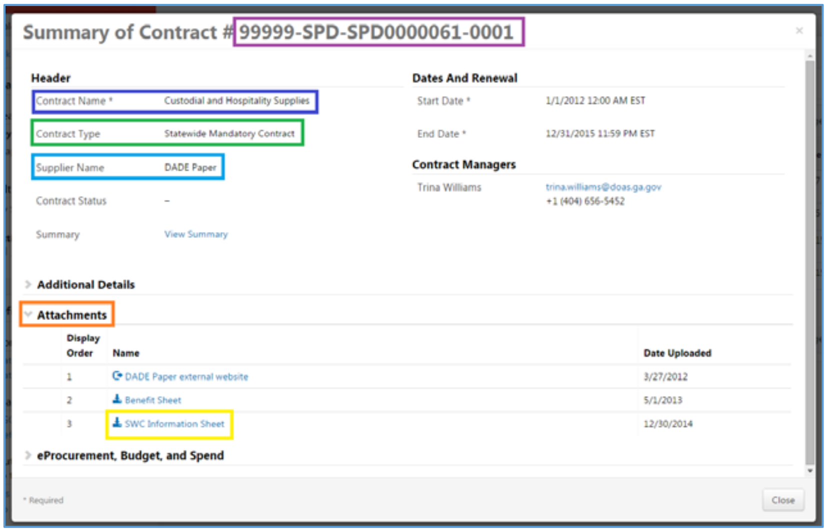
d. Advanced Search – search by keyword/description, mandatory or convenience contracts, supplier name, etc.



e. The search results that appear will let show the contract number (purple box), the contract name (dark blue box), supplier name (light blue box), and how many are mandatory or convenience contracts (green box).

f. To see the specifics of any contract, click on the Contract Number.

Appendix A: Accessing Statewide Contracts



g. A Contract Summary will pop up. This will show the contract number (purple box), the contract name (dark blue box), supplier name (light blue box), and if the contract is a mandatory or convenience contract (green box).

h. In the Contract Summary pop up, under the Attachments section, there will be a link that says “SWC Information Sheet” – SWC stands for State Wide Contract. The SWC Information Sheet gives all information about that specific contract regarding contacts, terms, ordering, remitting, discount percentages, etc.

i. Upon clicking the blue SWC Information Sheet link, it will usually show up at the bottom of the browser as a downloaded pdf, this document will open in a new tab within the browser.

Statewide Contract Information Sheet

Statewide Contract Number	**99999SPD00 00061**	**NIGP Codes**	**66524, 64022, 64050, 64060, 64075**
Name of Contract	**Custodial and Hospitality Supplies**		
Effective Date	**January 1, 2012**		
Contract Table of Contents			
Suppliers Awarded	**2**	**Contract Information:**	**Mandatory Contract**
Contract Information for Supplier		**Page Number**	
Dade Paper		**2**	
Southeastern Paper Group		**3**	
Additional Contract Information			
General Contract Information		**4**	
Contract Renewals/ Extensions/ Changes		**5**	
DOAS Contact Information		**6**	

j. The document that comes up gives the same over view of the contract. Contract Number (purple box), Type of Contract (green box), Supplier names (blue box), and additional information (yellow box).Clicking on one of the blue linked company names will display specific information for that particular company.

Supplier Information Sheet

Contract Information	
Statewide Contract Number	**99999-SPD-SPD0000061-0001**
PeopleSoft Supplier Number	**0000268086**
Supplier Name & Address	
Dade Paper Company **600 Hartman Industrial Ct. SW Suite 200** **Austell, GA 30168** EIN# 59-0784248	
Contract Administrator	
Kristina McSpadden Bid Specialist **Office:** 1-800-696-6919-ext. 4436 **Cell#** 770-616-0268 **Website:** http://www.dadepaper.com	
Contact Details	
Secondary: **Stacy Clayton** - Bid Coordinator 1-800-696-6919 ext. 4435 Customer Service Representative: **Kay Ross** - 1-800-696-6919 ext. 4586	
Ordering Information	Dade Paper Company 600 Hartman Industrial Ct. SW Suite 200 Austell, GA 30168
Remitting Information	Dade Paper Company 600 Hartman Industrial Ct. SW Suite 200 Austell, GA 30168
Delivery Days	Orders will be shipped within 10 days after receipt of Purchase Order
Discounts	N/A
Payment Terms	Net 30 Days
Bid Offer includes	State and Local Government
Acceptable payment method	Supplier will accept Purchase Orders and the Purchasing Card under this contract as permitted by current policies governing the Purchasing Card program.

k. When clicking the Supplier name, the system will take jump to that particular company's Supplier Information Sheet within the document. This gives company information, contact information, lead times, how to order and much more.

NIGP Codes/Category Numbers Lookup Links

- There are 2 ways to look up Category/NIGP codes outside of Peoplesoft to ensure the most appropriate code is being used:
  - Full Category Listing (do not use the dashes when entering the 5 digit code in eProcurement)
    - http://ssl.doas.state.ga.us/PRSapp/PR_nigp_list.jsp?whereFrom=public
  - Exempt Code
    - http://doas.ga.gov/assets/State%20Purchasing/NEADocumentLibrary/NIGPExemptList.pdf

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NIGP Codes/Category Numbers

- Category Numbers in eProcurement are also known as NIGP Codes.
- When choosing a Category Number:
  - If the Category Number
    - ends in two zeros (00)
    - is bold
    - the description is in ALL CAPS
  - These are considered header numbers aka header categories and will NEVER be used.
  - Sub-category numbers will always be used.
  - Subcategories will not be bold, end in two zeros, nor be in all caps.

NIGP	Description	
005	**ABRASIVES**	HEADER NUMBERS/CATEGORY
005--05	Abrasive Equipment and Tools	
005--14	Abrasives, Coated: Cloth, Fiber, Sandpaper, etc.	
005--21	Abrasives, Sandblasting, Metal	
005--28	Abrasives, Sandblasting (Other than Metal)	
005--42	Abrasives, Solid: Wheels, Stones, etc.	SUBCATEGORY
005--56	Abrasives, Tumbling (Wheel)	
005--63	Grinding and Polishing Compounds: Carborundum, Diamond, etc. (For Valve Grinding Compounds See Class 075)	
005--70	Pumice Stone	
005--75	Recycled Abrasives Products and Supplies	
005--84	Steel Wool, Aluminum Wool, Copper Wool, and Lead Wool	
010	**ACOUSTICAL TILE, INSULATING MATERIALS, AND SUPPLIES**	
010--05	Acoustical Tile, All Types (Including Recycled Types)	
010--08	Acoustical Tile Accessories: Channels, Grids, Mounting Hardware, Rods, Runners, Suspension Brackets, Tees, Wall	

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NIGP Codes/Category Numbers

- Header numbers/categories must be appropriate for what is being requesting.
  - Example – If a pair of work boots is requested, the would subcategory number that falls under the Header of 'VEHICLES' would not be used. There may be a subcategory under 'VEHICLES' that says "Shoe". This subcategory number refers to an item that will be used for vehicle purposes, not something would be used a foot protection.

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NIGP Codes/Category Numbers

- There will not always be a category that describes the requested goods or services perfectly. It is your responsibility to find the most fitting number to use.
- If a service is requested, the category/NIGP subcategory code will start with a 9.
  - Example - Transportation of Goods (Freight/Shipping) is category number 96286, it starts with a 9; it is a service not a good.

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Exempt NIGP/Category Codes

- Exempt Codes do not have a dollar threshold; these do not need to be bid out if the request is $24,999+ per purchase like other purchases would be.
- Exempt Codes are on the full category listing and the keyword search as well as in the exempt list.

Appendix C: IT Purchasing Process & Common Codes

For an IT Requisition:

- Name the requisition – Department_Individual it is for.

Account Number:

- Refer to the Active Expense handout for the correct account code.
- Quote or Invoice must be attached to purchase request in eProcurement. If this is a state contract that must be reflected on the quote/invoice.

Format of attachments:

- Quotes/Invoices need to be in .pdf format.

Computer/Ipad Purchases:

- Obtain a quote from Information Technology
- HP – DO NOT USE THE CATALOG – pricing changes monthly.
- Apple – obtain a quote from Information Technology as we can obtain educational pricing.

Webhosted Software and Software:

- SAAS Form must be filled out.

External Storage Devices:

- Flash Drives/External HardDrives must meet state compliance.
- A business purpose form needs to be filled out to reflecting:
    - Will this new software/service collect, process, store or transmit the following types of data: (Bank Card Info (PCI), Health Records (HIPAA),Consumer Financial Info (GLB), Student Information (FERPA), VSU Sensitive Data)

Software and IPad app requests:

- Software Requests – need to indicate user and computer id tag #
- IPad app requests need to indicate user and email.
- If there is an **agreement** to be signed it must go through **Contract Management** first.
- Software and Maintenance and Renewals – indicate term and use the unit of measure as "YR".

VoIP Equipment:

- Do NOT use eProcurement for these purchase requests.
- Use the online request form https://eas1.valdosta.edu/goldenrod/login.aspx
- Send the request to Information Technology
- These types of purchases will be a charge back on the VoIP phone bill.

Appendix C: IT Purchasing Process & Common Codes

<u>Common Information Technology/IT Codes are:</u>

20448 Keyboards
20460 Computer display Monitor
20476 Printer, Inkjet (not recommended)
20477 Printer, Laser
20488 Scanners, Document: Handheld, Desktop and High Volume
20532 Drives, External (Jump Drives, Flash Drives, etc.), Environmentally Certified Products
20535 Drives, Hard/Fixed Disk, Environmentally Certified Products
20553 Microcomputers, Desktop or Tower based, Environmentally Certified Products
20554 Microcomputers, Handheld, Laptop, and Notebook, Environmentally Certified Products
20614 Cables: Printer, Disk, Network, etc.
20687 Servers Micro/Mini/Mainframe Computer
20734 Computer Cases
20775 Projection Devices and Accessories: Smart boards, Panels, etc.
20811 Tablet apps - Application Software, Microcomputer
20827 Communications: Networking, Linking
20854 Internet and Web Site Software for Microcomputers
28545 Lamps, Projector
91551 Information Highway Electronic Services (Internet, etc.)”.
96286 Transportation of Goods
96391 Warranties

- Most IT codes will be 204xx, 205xx, 208xx numbers as appropriate for the requested items.

Appendix D: Requisition/PO Status Terms and Definitions

1. Requisition Status Definitions:
   a. Open: request has been entered and saved, but has not been submitted for approvals.
   b. Pending: request has been entered, saved and submitted for approvals.
   c. Approved: request has been entered, saved, submitted and all approvers have approved the request.
   d. Denied: any approver has the ability to deny the request. If the request is submitted, find out what needs to be corrected or if the request needs to be cancelled then either edit the request and re-submit for approvals or cancel the request.

2. PO Status Definitions:
   a. PO Created: request has been entered, saved, submitted, approved, passed budget check and a Buyer has sourced the requisition into a purchase order.
   b. PO Dispatched: request has been entered, saved, submitted, approved, passed budget check, sourced to a purchase order, processed by a Buyer.
   c. Received: The order has been completely fulfilled and has been received by VSU Central Receiving.
   d. Complete: The order has been received and the invoice paid. The order is now complete and done.
   e. Canceled: If the request was canceled, which can be done at any time prior to the PO being dispatched, the status will be changed to Canceled. If the request needs to be canceled and the PO has been dispatched, contact the respective buyer for your department to have the PO and Requisition closed.

3. Budget Status Definitions:
   a. Not Chk'd: This means the request has not gone through a budget check yet. Requests are not budget checked until the request has received all approvals.
   b. Valid: This means the request has been approved, passed budget check and is waiting to be sent to the supplier by the system.
   c. Error: This means there is a problem with the accounting/budget being used. Please contact Budget Services to resolve the error at x5710.