

# Procurement Quarterly

## Workday Launched July 1, 2016

Workday, the University's new HCM and Finance system, launched Friday, July 1st with quite a bang. The unified system combines the online catalog experience and ad hoc purchasing into one. Users are able to shop online catalogs from 7 most commonly used suppliers: Airgas, B & H Photo, CDW-G, Dell, Grainger, Office Depot and VWR will continue to receive electronic purchase orders through Workday and provide invoice detail directly back into the system for electronic approval and processing by Accounts Payable and Travel; continuing to accomplish the goal of electronic systems: To improve and streamline the entire process from ordering and buying to payment approval.



In support of the implementation of Workday, Procurement Services trained Cost Center Managers, Campus Buyers and other Purchasing Coordinators; training staff from the following campuses: LSU A&M, Agricultural Center, Pennington Biomedical Research Center, LSU Alexandria, LSU Eunice and LSU Shreveport.

**14,661 Purchase Orders Issued as of 12/31/16**



Finance & Administration  
Procurement & Property Management

### Procurement Workday Training

- February 22, 2017
- March 29, 2017
- April 26, 2017
- May 31, 2017

Classes to be held in the Memorial Tower Room from 9:30 a.m. - 12:00 p.m.

### Business Assets Workday Training/ Practice Lab

- February 17, 2017
- April 7, 2017

Class to be held in the Coates Hall Room 205 from 9:30-11:30AM

To view information or register for training classes:

- ⇒ Log in to MyLSU
- ⇒ Click on 'Employee Resources'
- ⇒ Click on 'HRM Training Programs'
- ⇒ Validate your personal information
- ⇒ Click on 'Training Programs'
- ⇒ Check selected class/date
- ⇒ Click 'Register'

### Procurement Summit and Vendor Show September 27-28, 2017

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## Supplier Enrollment

Suppliers are used in Workday to make payments to outside entities/individuals for goods and services procured and travel reimbursements. The Supplier database is shared with all LSU campuses using Workday (LSUAM, LSUA, LSUE, LSUS, LSU Ag Center and PBRC).

Suppliers requesting setup in Workday must utilize the online Supplier Enrollment Form located on the LSU Procurement Services’ website (Supplier Info). The form was recently updated to provide instructional text to assist foreign suppliers. A completed and signed W-9 (domestic), W-8BEN (foreign individual) or W-8BEN-E (foreign entity) form must be submitted with the application and is required to complete the enrollment process to obtain a LSU Supplier ID. *Failure to submit a W-9/W-8BEN shall delay setup or cause rejection of the application if not provided upon request.*

**LSU Employees are prohibited from completing the supplier enrollment form on behalf of the supplier, however, are expected to assist their proposed supplier in interpretation should there be question. If questions are technical in matter, the department or supplier should email the Supplier Administrator at [suppliers@lsu.edu](mailto:suppliers@lsu.edu) for assistance and include screenshots of errors received.**

Upon submission of the application, the supplier will receive a confirmation email indicating the application was submitted.

The standard approval time of supplier enrollment applications is 3-5 business days.

The supplier will then receive a second email to indicate approval/denial of the application. At this point the supplier will be available in Workday for use.

## Spend Categories: The Good, Bad and Ugly

Spend categories are a required element for every Workday Procurement transaction. Spend categories are a blend of commodity codes which identify the type of good/service being purchased AND object codes from the Legacy system. Workday spend categories can be deemed trackable while others are not tracked. A tracked spend category should be used for items with a total acquisition cost of \$1,000 or greater, with the exception of bullet proof vests, firearms, and livestock/animals that are tracked at any value, and are tagged as an LSU asset.

The goal of Procurement spend categories is to build a well-rounded view of the overall spend based on commodities across the LSU system. Accurate reports for commodity spend opens the potential for higher discounts/new contracts, which is a good thing for the University. It has been noticed in initial reports that some end users are selecting the spend category based on the spend category hierarchy and/or the project they are using the items for

rather than the specific item within the spend category hierarchy.

For Example: Adding a memory board to a CPU, some end users select Maintenance – Computer Equipment (SC008) while the appropriate selection should be Computer Supplies (SC0172).

Remember: The spend category is tied to the good/service itself, rather than the project/end use of the item.

The crosswalks regarding legacy object codes were created to help give direction of the new spend category structure, however, both the initiator and approvers (Cost Center Manager and Buyers) should all share in the responsibility of taking a second look to ensure the selected spend category accurately identifies the good/service being purchased. Click [HERE](#) for a list of Procurement Spend Categories.



## Computer/Accessories Tagging

The total costs for a computer and accessories purchased separately should not be combined to determine whether it should be an LSU tagged asset (trackable spend category).

*For example: A desktop computer (SC0357 if over \$1K but under \$5K; or SC0173 if over \$5K) and monitor (SC0172) should be itemized on the requisition/purchase order/invoice and treated separately. The monitor would be tagged separately, if it meets or exceeds the tagging threshold. Otherwise, it would not be tagged at all. Same thing for keyboards, speakers, etc.*

The reason for this is that these items (accessories) are often interchangeable and move around between other devices and it creates problems if Property Management were to track an entire “kit” as a single asset over the years.

## Workday Procurement FAQs

In an effort to provide the answers to some of the most frequently asked Procurement related questions, Procurement Services has developed a FAQ webpage on our website (Workday—Procurement FAQs). This webpage is continuously updated as repeat questions or issues are resolved.



Visit our [FAQs page](#) to view the list of questions and answers on topics such as:

- ⇒ Cancelling/Closing Purchase Orders
- ⇒ Deleting or Copying Requisitions
- ⇒ Ship To Address Errors
- ⇒ Finding and Changing Purchase Orders

## Procurement Reminders

- ◆ Departments representatives are **not** authorized to sign contracts or agreements on behalf of the University. Any contract requiring signature should be routed to Procurement Services for execution.
- ◆ For requisitions requiring competitive bidding, specifications must be attached in word or excel format to ensure that edits can be made to the specifications if necessary. Please do not attach documents that are password protected. Procurement Services cannot proceed with a solicitation until we have complete specifications.
- ◆ The turnaround time for goods/services requisitions released to Procurement Services is typically **7-10 days**. Please plan requisition submission accordingly. Purchases requiring competition may require additional time to allow for the competitive process.

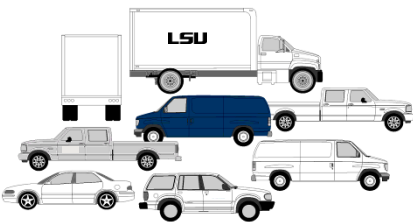
## Contracting Services Tips

- ◆ Effective 7/1/16, the [PUR-CR](#) and [PUR-SS](#) forms were revised to capture Workday details and are located on the Forms page of the Procurement Services website.
- ◆ Required Forms on Contract Professional/Specialty/Consulting Services (PSC) requisitions:
  - ◆ Contractor Information (PUR-CR) is **required for all regardless of the dollar amount**.
  - ◆ Scope of Services (PUR-SS) is **required for all over \$2000**.
  - ◆ [Indemnification Agreement and Insurance Verification](#) is **required for all less than \$2,000**, (inclusive of travel expenses) **if the vendor is performing service on LSU campus**.
  - ◆ [AS516](#) is **required if travel is being reimbursed**.
- ◆ PSC requisitions under \$2,000 do not require a contract but must be submitted to Barbara A. Daniel for processing to a purchase order.



**Did you know?**

## Property Management



### FLEET RESPONSIBILITIES

With the transition from the Asset Management system to Workday, all monthly MV-3 fleet data, including mileage, fuel and preventive maintenance, must be entered directly in the Louisiana Property Assistance Agency's (LPAA) AMS system.

To access the LPAA AMS system for the first time, go to [www.assetworks.com/login/](http://www.assetworks.com/login/), then type "LA" in the Customer field, and click sign in. You will then be taken to the actual login screen. Save this link as a favorite for future access.

All current Fleet Managers received a temporary password to access the system in September 2016. If you are a Fleet Manager and do not know your Username or password, or if your department needs to designate a new Fleet Manager please email Property Management at [property@lsu.edu](mailto:property@lsu.edu).

Use the "forgot password" option on the login page as a first resource if you experience login issues. If you continue to have problems accessing LPAA's system, contact Property Management for further assistance.

**IMPORTANT:** It is critical that each month's entries be completed **no later than the 15<sup>th</sup> of the following month**. If you have any outstanding prior data please get it entered immediately as LPAA has already begun another review of vehicle utilization. Mileage driven but not entered into the LPAA system will not be considered when determining vehicle usage, and could result in the loss of fleet vehicles!

# Staff Directory

**Sally A. McKechnie**

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**Tiffany N. Robinson**

Business Development Manager  
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Strategic Sourcing Analyst  
Strategic Sourcing & Spend Analysis; Supplier Website Error, Delivery & Supplier Issues

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## Procurement Staff

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Buyer  
Appliances, Automotive equipment and supplies; Boats and Marine supplies; Furniture; Fuel; Charter Services

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**Allison B. Lansing**

Buyer  
Artwork; Audio/Visual equipment and supplies; Business System Purchases; Catering; Conference/Meeting & Facility Rentals; Courier/Freight Services; Food; Office, School, Library Equipment & Supplies; Paper; Printing Equipment, Services & Supplies; Publications & Copyrighted Materials; Promotional Items; Uniforms

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Contract Specialist  
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**Amy H. Bourgeois**

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Construction/Renovations Projects; Laboratory/Research/Clinical/Biomedical/Environmental/Nuclear, etc., supplies, equipment & services; Lab and drug testing; Hospital and Laboratory Gases; Pharmaceuticals; Police/Safety Equipment; Safety Equipment & Supplies; Veterinary Equipment & Supplies; Water Treatment Chemicals

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Buyer  
Athletic equipment and supplies; Brand Name products; Fitness equipment and supplies; IT Purchases (Computer Hardware etc); Moving/storage; Music equipment and supplies; Security Services; Telecom equipment & services; Telecom Manpower; Vehicles

225-578-5510  
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**Sommer E. Freeman**

Buyer  
Agricultural equipment & supplies; Elevator Maintenance; Garbage Disposal Services; Grounds Equipment, Supplies & Maintenance; Heavy Construction Equipment; Supplemental Manpower Contracts; MRO Equipment, Tools & Supplies; HVAC equipment & supplies; Laundry Services; Pest Control; Janitorial services & supplies

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## Support Staff

**Barbara A. Daniel**

Administrative Coordinator  
Receptionist; Office Mail Distribution; State Contract Purchases under \$50,000; Professional, Specialty & Consulting Purchases less than \$2,000

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This newsletter is posted to the Procurement website at <http://www.procurement.lsu.edu> and emailed to Procurement Training Attendees, Department Purchasing Agents, Business Managers and those who have requested to be added to the email distribution list. To request to be added to or deleted from this list, contact Tiffany N. Robinson at [tcart12@lsu.edu](mailto:tcart12@lsu.edu).