

Contract Use Tools



Presented by: Cheryl Edgington and Cathy Neidner

Solving the Procurement Puzzle



2016
State Bureau of Procurement Conference
Wisconsin Department of Administration

What would help make my job easier?



Solving the Procurement Puzzle



2 0 1 6

State Bureau of Procurement Conference

Wisconsin Department of Administration

Agenda

- Contract Basics
 - VendorNet, WISBuy, PeopleSoft
- Policy and Process
 - Piggyback and Cooperative Purchasing
- VendorNet Resources
 - Search and filter functions
 - User guides, price lists, other tools
- Contacts
 - Who to contact when
- Other Resources



Solving the Procurement Puzzle



2 0 1 6

State Bureau of Procurement Conference

Wisconsin Department of Administration

Contract Basics – General

- Contract Types
 - Mandatory – “M”
 - Required for agencies/campuses
 - May be available to others
 - Optional – “O”
 - Not required for agencies/campuses
 - Considered convenience contract
 - May be available to others
 - Badger State Industries – “M”
 - Prison industries, under umbrella of DOC
 - State Use – “U”
 - Products and services from WI certified work centers employing persons with severe disabilities
- Contract Naming Convention
 - [PIM-16001](#)



Solving the Procurement Puzzle



2 0 1 6

State Bureau of Procurement Conference
Wisconsin Department of Administration

Contract Basics

Contract Basics - VendorNet

VendorNet Registration Bids Contracts NIGP Codes Forms General Procurement FAQ Contact Us Login

View Contract

[Back to Contracts](#)

Title:	Data Breach and Credit Monitoring Services
Agency:	ADMINISTRATION, DEPT OF
Contract Number:	505ENT-M16-WSCADBCRMON-01
Start Date:	5/11/2016
End Date:	3/22/2018
Cooperative Purchase?	Yes
Mandatory Purchase?	Yes
PCard?	Yes
Piggyback?	No
Manager:	Cathy Neidner , Phone: 608-266-3620 Fax: 608-267-0600
Procurement Authority:	WSCA NASPO MA16000145-01
Contract Applicable To:	
Synopsis:	<p>The Data Breach and Credit Monitoring Services contract has been executed to provide State agencies, UW campuses and cooperative purchasing groups the ability to respond quickly should a data breach occur. The contract provides services related to data breach, including notification assistance, call center services and single or triple bureau credit monitoring (including identity theft monitoring, restoration and insurance) for affected individuals. Data Breach Notification services include:</p> <ul style="list-style-type: none">• Creation of a Notification Plan• Prepare, print and send Notifications• Call Center support for the triage event. Answer general questions regarding services, eligibility and enrollment.

[Link to VendorNet](#)

Solving the Procurement Puzzle



2016
State Bureau of Procurement Conference
Wisconsin Department of Administration

Contract Basics - WISBuy

- PCard Marketplace and eCatalog
 - Must be registered user to [login](#)
 - Online shopping experience similar to Amazon
 - Provides catalog of contract items for commodities such as:
 - Office Supplies
 - Maintenance, Repair and Operations
 - Medical Supplies
 - Cleaning Chemicals
 - Search and compare items across multiple suppliers

Solving the Procurement Puzzle

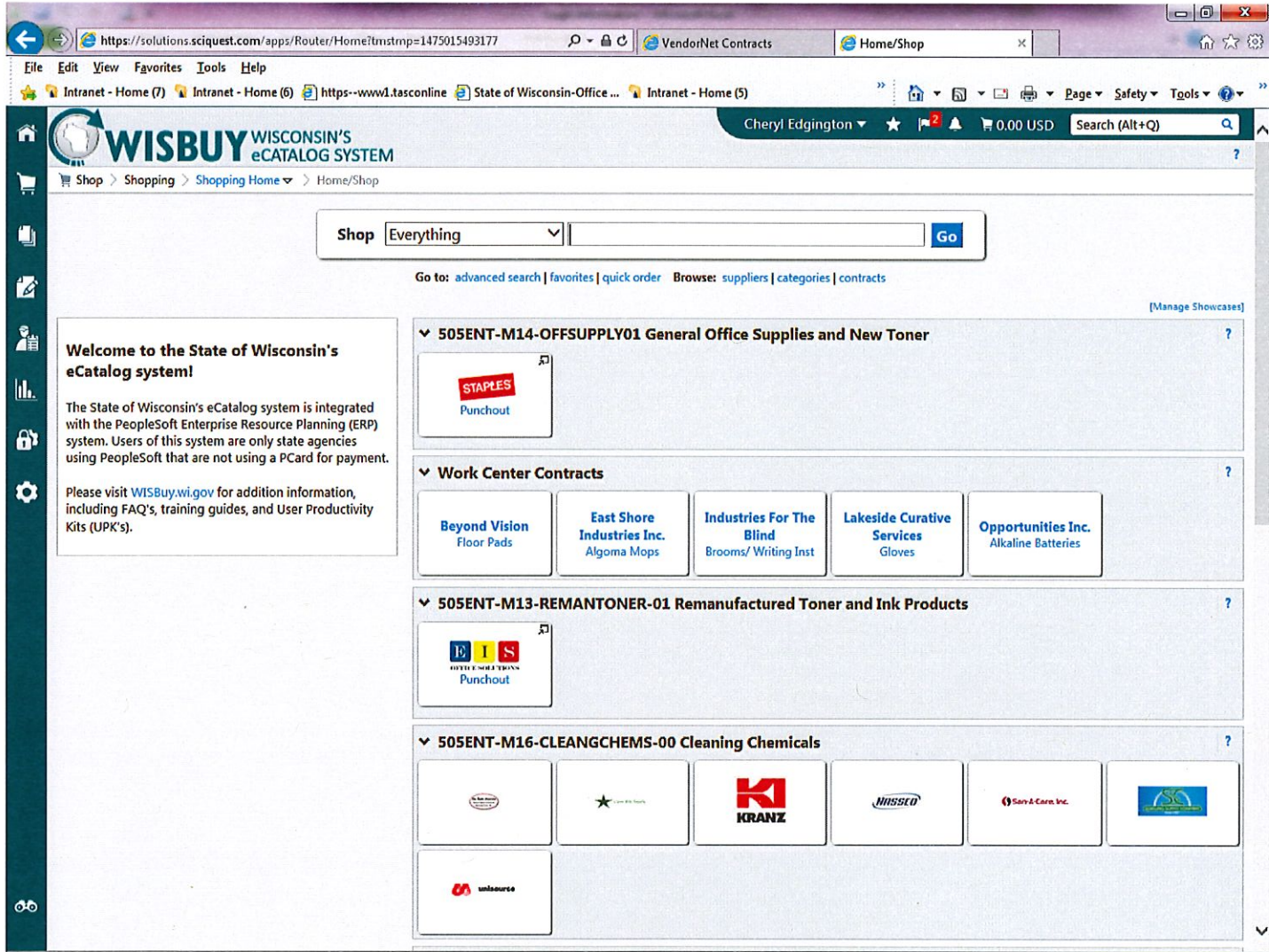


2 0 1 6

State Bureau of Procurement Conference
Wisconsin Department of Administration

Contract Basics

Contract Basics - WISBuy



[Login to WISBuy](#)

Solving the Procurement Puzzle



2016
State Bureau of Procurement Conference
Wisconsin Department of Administration

Contract Basics

Contract Basics - WISBuy

The screenshot shows the WISBUY website interface. At the top, the user is logged in as Cheryl Edgington. The search bar contains 'ecolab' and shows 265 results. The left sidebar contains filter options for Product Flag (Green), Supplier (City Supply, Columbia Pipe & Supply Co., etc.), Category (Carpet or upholstery cleaners, etc.), Packaging UOM (BX, CS, DR, EA, PA), and Result Type (Products). The main content area displays a list of products with details such as part numbers, manufacturer information, and prices.

Product Name	Part Number	Manufacturer Info	Price	Unit
JAN 02222 Ecolab® Brite White NP Laundry Detergent, Brite White NP Laundry Detergent, 1.2oz Packets. Includes 250 packets of laundry detergent.	JAN 02222	61502222 - (JOHNSON & JOHNSON)	242.08 USD	PK
14126 CLEANER/LUBRICANT 5GAL ECOLAB KLENZ-GLIVEV 10 CONVEYOR	10512992	14126 - (ECOLAB)	57.09 USD	CS
15461 CLEANER ECOLAB KOOL KLENE ALKALINE FOR REFRIGERATOR/FREEZER 4 GAL/CS	10147308	15461 - (ECOLAB)	54.34 USD	CS
22638 HANDWASH 750ML ECOLAB DIGICLEAN HCPHW PERSONNELMILD FOAM YEL 6/CS	10296970	22638 - (ECOLAB/AIRKEM)	50.72 USD	CS
JAN 96406 Ecolab® Professional Behold® Furniture Polish. Professional Behold Furniture Polish, 16-oz Aerosol Cans. Includes six per case.	JAN 96406	61196406 - (JOHNSON & JOHNSON)	58.70 USD	CS
11490 CLEANER 20OZ ECOLAB LEMON LIET KITCHEN & BATH CLR BRIGHT AMBER			47.10 USD	

[Login to WISBuy](#)

Solving the Procurement Puzzle



2016
State Bureau of Procurement Conference
Wisconsin Department of Administration

Contract Basics - PeopleSoft

- Agency users only
- Search on Procurement Contracts
- Contract ID
 - Same as VendorNet contract ID
 - Used as reference information on purchase requisitions
- WISBuy eCatalog
 - Same look and feel but access system through PeopleSoft instead of direct entry like PCard Marketplace
- Basic information including:
 - Beginning and Expiration Dates
 - Supplier Information
 - NIGP Code

Solving the Procurement Puzzle



2 0 1 6

State Bureau of Procurement Conference
Wisconsin Department of Administration



Contract Basics - PeopleSoft

[Favorites](#) | [Main Menu](#) | [Procurement Contracts](#) | [Add/Update Contracts](#)

[Home](#) | [Worklist](#) | [Add to Favorites](#) | [Sign out](#)

[New Window](#) | [Help](#) | [Personalize Page](#)

Contract Entry
Contract

SetID

Contract ID

*Status

Administrator/Buyer

Contract Version
 Version Status

Approved Date

Header

Process Option

*Supplier

*Supplier ID

*Begin Date

Expire Date

Renewal Date

Currency

Primary Contact

Supplier Contract Ref

Description

Master Contract ID

Tax Exempt ID

Tax Exempt

[Edit Comments](#) | [Contract Activities](#) | [Primary Contact Info](#) | [Contract Header Agreement](#) | [Contract Releases](#)

[Activity Log](#) | [Document Status](#) | [Thresholds & Notifications](#) | [View Changes](#) | [Current Change Reason](#)

Amount Summary

Maximum Amount	<input type="text" value="0.00"/>	USD
Line Item Released Amount	<input type="text" value="0.00"/>	
Category Released Amount	<input type="text" value="0.00"/>	
Open Item Released Amount	<input type="text" value="0.00"/>	
Total Released Amount	<input type="text" value="0.00"/>	

Order Contract Options

Allow Multicurrency PO | Allow Open Item Reference | Must Use Contract Rate Date | Rate Date

Corporate Contract | Adjust Supplier Pricing First | Auto Default

Lock Chartfields | Price Can Be Changed on Order

PO Defaults | [Add Open Item Price Adjustments](#) | [Price Adjustment Template](#)

Voucher Contract Options

Invoice Number

AP Business Unit

Accounting Template

Payment Terms ID

Gross Amount USD

Freight Amount

Sales Tax Amount

VAT Amount

100%

[Login to PeopleSoft](#)

Solving the Procurement Puzzle



2016
State Bureau of Procurement Conference
Wisconsin Department of Administration

Policy and Process

- State Bureau of Procurement contracts are available to all agencies and campuses
 - Designated as 505ENT
- Piggybacking and Cooperative Purchasing
 - Piggybacking refers to agency/campus use of other agency/campus contract
 - Cooperative purchasing refers to municipality use of State contracts
 - Municipality means a county, city, village, town, school district, board of school directors, sewer district, drainage district, technical college district, federally recognized Indian tribes or bands, or any other public or quasi-public corporation, officer, board or other body having the authority to award public contracts
- How to submit request
 - [STAR Piggybacking Request \(DOA-3871\)](#)

Solving the Procurement Puzzle



2 0 1 6

State Bureau of Procurement Conference
Wisconsin Department of Administration

Policy and Process

- Key elements of consideration (SBOP)
 - Contract was competitively bid
 - Open for use by other agencies/municipalities
 - Requested term does not exceed contract term
 - Commodity or service needed aligns with contract scope
 - Requesting agency has confirmed status with originating agency
- Procurement Manual
 - Piggybacking [PRO-D-29](#)
 - [PIM-16002](#) STAR Piggybacking
 - Cooperative Purchasing [PRO-D-30](#)

Solving the Procurement Puzzle



2 0 1 6

State Bureau of Procurement Conference
Wisconsin Department of Administration

VendorNet Resources

- Most comprehensive source of contract information
- VendorNet Search feature allows you to limit the results using the following factors:
 - Keyword or Number
 - Agency
 - NIGP code
 - Supplier
- Example of a keyword search on the next slide

Solving the Procurement Puzzle



2 0 1 6

State Bureau of Procurement Conference
Wisconsin Department of Administration



VendorNet Resources

VendorNet Bids Contracts NIGP Codes Vendors Forms General Procurement FAQ Contact Us My Profile ▾

Search Contracts Create Contract

Keyword or Number

Agency

NIGP

Supplier

Piggyback Yes No Both

Cooperative Purchase Yes No Both

Mandatory Purchase Yes No Both

PCard Yes No Both

*Hit Enter to Search

Check "Include All Agencies" to include contracts from all agencies

Include All Agencies

Contract Number	Title	Agency	Start Date
505ENT-M16-WSCAEDUFURN-00	WSCA-NASPO EDUCATIONAL FURNITURE (PARTICIPATING ADDENDUM)	ADMINISTRATION, DEPT OF	11/17/2015
505ENT-M15-OFFURNITUR-00	STATEWIDE OFFICE FURNITURE	ADMINISTRATION, DEPT OF	8/15/2014
505ENT-M15-BSI-OFFURN-01	MANDATORY STATEWIDE OFFICE FURNITURE CONTRACT - BADGER STATE INDUSTRIES (BSI)	ADMINISTRATION, DEPT OF	8/15/2014
410012-M13-JTB3548-RFB-01	Workstation Components and Accessories, Keyboard/Mouse Trays, Lighting, and other Ergonomic Office Furniture Products.	CORRECTIONS, DEPT OF	11/16/2012
TR 406921	Dispatch Console Furniture for the WisDot State Patrol	TRANSPORTATION, DEPT OF	10/5/2011

Refresh

[Link to VendorNet](#)

Solving the Procurement Puzzle



2016
State Bureau of Procurement Conference
Wisconsin Department of Administration

VendorNet Resources

- You can further limit results by filtering on one of the following criteria:
 - Piggyback
 - Mandatory
 - Cooperative Purchase
 - PCard
- Chose Yes/No or Both
- Example of filtering by Piggyback on the next slide

Solving the Procurement Puzzle



2 0 1 6

State Bureau of Procurement Conference
Wisconsin Department of Administration

VendorNet Resources

VendorNet Registration Bids Contracts NIGP Codes Forms General Procurement FAQ Contact Us Login

Search Contracts

Keyword or Number

Agency

NIGP

Supplier

Piggyback Yes No Both

Cooperative Purchase Yes No Both

Mandatory Purchase Yes No Both

PCard Yes No Both

*Hit Enter to Search

Contract Number	Title	Agency	Start Date
410036-M17-RLH5667-RFB-01	Transitional Psychiatric Services in Multiple Cities/Counties Within DCC Regions 2, 4 and 7	CORRECTIONS, DEPT OF	10/1/2016
395002-M16-0500022-000-00	Gas Masks/Filters and Riot Gloves	TRANSPORTATION, DEPT OF	9/8/2016
505ENT-O17-SALESFORCE-00	Salesforce Implementation Services	ADMINISTRATION, DEPT OF	8/26/2016
505ENT-M17-DSPSBLFOOD-00	Food Service Disposables (FSD)	ADMINISTRATION, DEPT OF	8/5/2016
395002-O17-0500012-000-01	In-Vehicle Video Camera System	TRANSPORTATION, DEPT OF	8/4/2016
505ENT-O17-ONLINEAUCTN-01	Online Surplus Auction Services	ADMINISTRATION, DEPT OF	8/1/2016
505ENT-O17-BODYARMOR-00	Body Armor (NIJ approved Bullet/Stab Resistant Tactical Products, Including Vests)	ADMINISTRATION, DEPT OF	8/1/2016
395002-M16-0407625-000-00	Channel Steel Posts	TRANSPORTATION, DEPT OF	7/28/2016
395002-O17-0500026-000-01	EF Johnson Safety Radios, Base Stations, and Related Equipment	TRANSPORTATION, DEPT OF	7/22/2016
505ENT-M17-DSPSBLPPRP-00	Universal Sized Cafeteria and Washroom Paper Products	ADMINISTRATION, DEPT OF	7/1/2016

[Link to VendorNet](#)

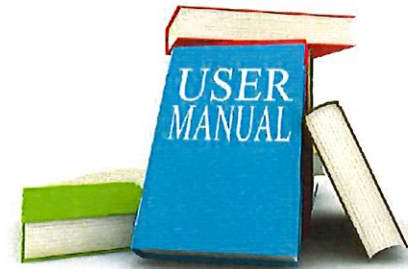
Solving the Procurement Puzzle



2016
State Bureau of Procurement Conference
Wisconsin Department of Administration

VendorNet Resources

- Documents/Attachments
 - Pricing
 - Location listing/region map
 - Manufacturer/Reseller/Dealer Information
 - Order form
 - Templates
 - Statement of Work
 - Report
 - [User Guide](#)
 - [Quick Start User Guide](#)
 - [PowerPoint](#)



Solving the Procurement Puzzle




2 0 1 6

State Bureau of Procurement Conference
Wisconsin Department of Administration

VendorNet Resources

[Link to VendorNet](#)

 WISCONSIN DEPARTMENT OF ADMINISTRATION

Division of Enterprise Operations
State Bureau of Procurement

Quick Guide

Security Guard Services
Contract #505ENT-M16-SECGRDSVS-00
RFB #28181-AS

Mandatory: YES (for State Entities)
Cooperative: YES (WI municipalities may use this contract)

Contract Term:
Initial Contract Term: July 1, 2015 thru June 30, 2017
1st Renewal Term: July 1, 2017 thru June 30, 2018
2nd Renewal Term: July 1, 2018 thru June 30, 2019
3rd (Final) Renewal Term: July 1, 2019 thru June 30, 2020

Scope
This contract is for Security Guard Services (unarmed and armed) throughout 8 regions in the State. This contract is required for State agencies and optional for UW campuses. This contract may be used by municipalities.

Using the Contract

- Authorized users with a need for security guard services will contact DOA, Division of Capitol Police (See [PRO-I-7](#) for more info). Requirement for Armed Security Guard services must be justified through a formal risk assessment process and approved by Capitol Police.
- Determine which supplier is awarded in the Region in which the facility is located and for the classification required by the agency.
 - [Region Map](#)
 - [Complete Price List by Classification](#)
- Contact one of the awarded suppliers directly with a clear list of expected duties, patrol routes, etc. Work with the supplier to complete a Statement of Work Form
 - [Sample Statement of Work](#)

Suppliers and Contracts

JBM Patrol
505ENT-M16-SECGRDSVS-01
Awarded:

- Security Guard I (Regions 2,4,6)
- Security Guard II (Regions 1,2,4,6)
- Security Guard III (Regions 1,2,4,6)

Contact: Jim Mankowski
Phone: 608-222-5156 Fax: 608-222-5490
Email: jbm@jbmpatrol.com

Per Mar Security
505ENT-M16-SECGRDSVS-02
Awarded:

- Security Guard I (All Regions 1-8)
- Security Guard II (All Regions 1-8)

Contact: Dave Weber
Phone: 414-483-2239 Fax: 414-744-9949
Email: dweber@permarsecurity.com

Team Security Inc (TSI)
505ENT-M16-SECGRDSVS-04

- Security Guard I (All Regions 1-8)
- Security Guard II (All Regions 1-8)

Contact: Clinton Smith
Phone: 920-676-5400
Email: tsincgb@gmail.com

5 characters (an approximate value).

Solving the Procurement Puzzle



2016

State Bureau of Procurement Conference
Wisconsin Department of Administration

VendorNet Resources

[Link to VendorNet](#)

Account Set-Up and Ordering Methods

State customers and cooperative purchasing groups should register and place orders via one of the following methods.

Note: Some state agencies no longer allow ordering via the StaplesAdvantage website and have mandated that all ordering be done via WISBuy. Please refer to the table below to determine if your agency requires ordering via WISBuy.

Agencies that have mandated use of WISBuy for order placement are:

Agency	Effective Date
Department of Safety and Professional Services	July 1, 2016
Department of Agriculture, Trade and Consumer Protection	Target date of October 1, 2016
Department of Financial Institutions	July 1, 2016
Department of Workforce Development	July 30, 2016
Department of Children and Families	September 1, 2016
State of Wisconsin Investment Board	September 1, 2016
Public Service Commission	September 1, 2016
Department of Revenue	September 1, 2016
Department of Military Affairs	Target date of October 1, 2016

1. WISBuy PCard Marketplace (preferred method for State Agencies)

If you do not have a WISBuy Pcard Marketplace login please contact your Business Unit Administrator to gain access the WISBuy Pcard Marketplace site and request a login. Please allow adequate time for new login approval process. You must also confirm with Staples that your shipping location has been established in the StaplesAdvantage punchout.

Log onto WISBuy Pcard Marketplace and use StaplesAdvantage punchout catalog to place your order.

<https://solutions.scquest.com/apps/Router/Login?OrgName=WisconsinMarketPlace>

2. WISBuy eCatalog (STAR/PeopleSoft)

WISBuy eCatalog may be accessed via the PeopleSoft requisitioning process. Requisitioners will begin procurement activity within PeopleSoft; Browse and create requisition within WISBuy eCatalog/StaplesAdvantage punchout. Upon completion of requisition, user will be returned to PeopleSoft requisition to obtain the necessary approvals etc. Once requisition has been budget checked and approvals received, WISBuy eCatalog and the supplier will be notified of the purchase order.

Note: When creating a requisition, DO NOT copy previously issued orders. The WISBuy eCatalog is constantly changing and you will not receive the current pricing on items if you attempt to copy previous orders.

3. Any of the traditional ordering methods, such as On-Line at StaplesAdvantage website, phone or Fax

Note: If you are using a p-card the preferred method is via WISBuy PCard Marketplace.

Solving the Procurement Puzzle



2 0 1 6

State Bureau of Procurement Conference
Wisconsin Department of Administration

VendorNet Resources

[Link to
VendorNet](#)

Process

Step 1 – Contact BSI

Use mandatory State Contract #505ENT-M15-BSI OFFURN-01

Wisconsin State Statute mandates that agencies and campuses must buy from BSI.

If BSI cannot provide the item(s) needed you MUST obtain a waiver from them. Use DOC-2719 Waiver Request Form

Then use one of the contracts listed to the right.

Step 2 – Office Furniture or Educational Furniture contract

Use mandatory State Contract #505ENT-M15-OFFURNITUR-00 Statewide Office Furniture

See VendorNet to:

- Select a manufacturer and/or products
- Locate a dealer

If none of the awarded manufacturers can provide what is needed, a waiver must be requested. Use DOA-3830 Waiver Request Form to request a waiver from DOA

Use mandatory State Contract #505ENT-M16-WSCAEDUFURN-00 Statewide Educational Furniture

See VendorNet to:

- Select a category and awarded vendor

If none of the awarded vendors can provide what is needed, a waiver must be requested. Use DOA-3830 Waiver Request Form to request a waiver from DOA

Note: UW-Madison and UW-System campuses are excluded from mandatory use.

Step 3 – Other Method

Steps 1 and 2 MUST be completed before proceeding with procurement of furniture from non-contracted vendors. Procurement policy and procedures must always be followed.

Each of these steps are explained in further detail on the slides which follow.

Solving the Procurement Puzzle



2 0 1 6

State Bureau of Procurement Conference

Wisconsin Department of Administration

VendorNet Resources

- Discussion Point:
 - Have you used any of the contract tools we just discussed? What was your experience with them?
 - What tools have you created to assist end users with your contracts?
- Tools developed with input from end users
 - Contact contract manager with ideas/suggestions

Solving the Procurement Puzzle



2 0 1 6

State Bureau of Procurement Conference
Wisconsin Department of Administration

Contacts

Contacts

- Internal resources
 - Agency purchasing staff
 - MDS for campus users
- Supplier
 - Order Placement
 - Remember to reference the contract number to ensure you are getting correct pricing
 - Day to day issues, delivery, invoice, etc.
- SBOP
 - Contract manager with issues with pricing, performance, compliance etc.
 - [Complaint Report DOA-3686](#)
 - WISBuy helpdesk for order information

Solving the Procurement Puzzle



2 0 1 6

State Bureau of Procurement Conference
Wisconsin Department of Administration

Contacts

Contacts – Getting the word out

- Weekly VendorNet announcement of new contracts, updates, etc.
 - Sent to agency/campus procurement staff
 - Procurement staff further disseminate to end users
- State Agencies Purchasing Council (SAPC) and Interagency Procurement Council (IPC)
 - SBOP provides updates
 - Vendor presentations
- Distribution lists (when available)
- Attend various association events

Solving the Procurement Puzzle



2 0 1 6

State Bureau of Procurement Conference
Wisconsin Department of Administration

Other
Resources

Other Resources

- STAR Training and Job Aids
 - [Creating a Transactional Contract](#)
- Procurement Trainings
 - Course listing and registration information available online at:
[Purchase Process Training](#)
- WISBuy and VendorNet
 - DOAWISPro@wisconsin.gov



Solving the Procurement Puzzle



2 0 1 6
State Bureau of Procurement Conference
Wisconsin Department of Administration



Final Thoughts

- Today we provided you with some tools, tips and resources to assist you in using state contracts.
- Each of these tools represents just one component of a complete package.
- We'll have a small treat package for you as a reminder of the variety of contract tools available.



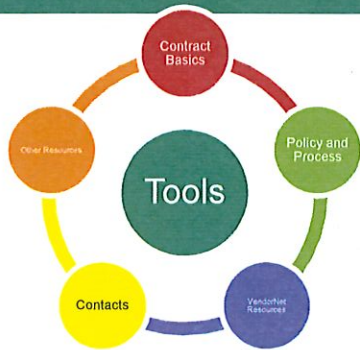
Solving the Procurement Puzzle



2 0 1 6

State Bureau of Procurement Conference

Wisconsin Department of Administration



Feedback/Evaluation

- Feedback

- On the cards at your table, please take a few minutes to answer the following:
 - Which of the tools presented today will be the most useful to you?
 - What information could SBOP provide that is not available today?
 - What other formats could SBOP use to offer information?

- Evaluation

- Please complete the session evaluation form

Solving the Procurement Puzzle



2 0 1 6

State Bureau of Procurement Conference
Wisconsin Department of Administration