

# PROCUREMENT NEWS

Procurement Services Newsletter

October 2016

## Introducing FileBound!

After nine years, Procurement Services will be replacing ImageNow with FileBound by Upland Software.

**New benefits of FileBound will include:**

- **User friendly platform**
- **Multiple device ready feature allows use with mobile phones and single sign-on**
- **Eliminates manual indexing**
- **Online Payment Request forms**

More information to come!

**Coming Soon!**

Payment Services Introduces

 **FileBound**  
by upland

We are replacing ImageNow & WebNow with FileBound for Improved Document Imaging & Invoice Approval Workflow

Here are just some of the benefits:

-  Streamlined invoice approvals via email means no new software to learn. Open the email, review the invoice, click "approve". Done!
-  Improved workflow notifications. Opt to automatically receive notifications via email when items are paid!
-  Optical Character Recognition (OCR) means increased efficiencies in Payment Services.
-  Campus will now have access to paid invoice images. Files will be available via Caltech's RADR system!
-  Online Payment Requests, Wire Transfer forms and more. No more shuffling PDF files around for approval signature!

**Caltech**

## Message from Disbursements: Stop Payment Requests

A gentle reminder that all Stop Payment Requests now go through the [Caltech Help Desk Ticketing System](#). This user friendly system allows the requestor to check the status of their ticket any time. *Questions? Email [PPSDisbursements@caltech.edu](mailto:PPSDisbursements@caltech.edu)*

# Purchasing Services

## Ordering Compressed and Specialty Gases

# Airgas®

Purchasing Services and **Airgas** are pleased to announce, effective immediately, the Airgas Punchout catalog in TechMart is available for shopping. You can now place your compressed gas orders directly with Airgas in TechMart.

For information on how to order :

→ **compressed gases** through Punchout in TechMart [click here](#)

→ **specialty gases** not available on Airgas Punchout [click here](#)

If you are interested in purchasing through TechMart and do not currently have a TechMart account, please contact [TechMartHelp@caltech.edu](mailto:TechMartHelp@caltech.edu).

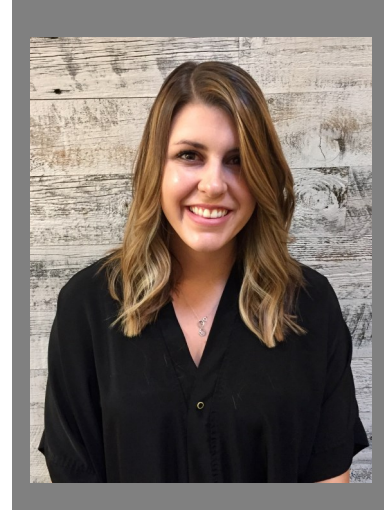
## New Updates on the Purchasing Website

- **Assignment Listing** - Want to know who your assigned Purchasing Buyer and Accounts Payable processor are? Find out here...
  - [Purchasing Services](#)
  - [Payment Services](#)
- **Purchasing Policies** - We have revamped our *Purchasing Services Policies and Procedures Manual* by separating it into three new policies:
  - [General Purchasing Services Policy](#)
  - [Purchasing Goods and Services Policy](#)
  - Coming Soon...Policy and Procedure on Issuance of Subawards and Subrecipient Monitoring
- **Commercial Terms and Conditions** - A new revision of our [T'S & C's](#) is now available online. These are what we incorporate into all of our POs.
- **Terms and Acronyms** - Did you ever want to know what SADBUs stood for or what Passive Approval means? Check out our newly updated [Terms and Acronyms](#) document to find out!

# Employee Announcements

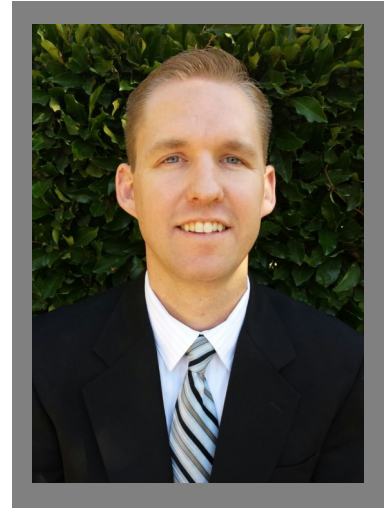
## Rachel Fisher: Purchasing Agent

Rachel started at Caltech in December 2012 as a member of the Support Services staff of the Procurement Services department. She graduated from Arizona State University in December 2015 with a degree in Business Communications. Rachel has recently been promoted to Purchasing Agent, supporting HSS, Finance/HR/Research Admin, Provost, President's Office, OGC, Library, CAPSI, and JPL. She has also taken over the role of Subaward Closeout Coordinator. Rachel has been with us for almost four years now, and we look forward to continue having her as a part of the Purchasing Services team!



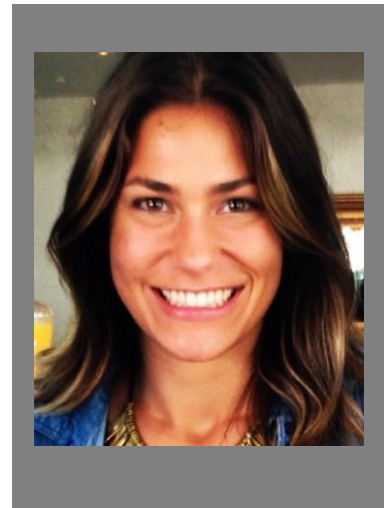
## Daniel Vest: Senior Contracting Officer

We are pleased to announce the promotion of Daniel Vest to Senior Contracting Officer. In his new position, Daniel will support Facilities Design & Construction primarily in the area of contract administration. Joining Purchasing Services in April 2012, Daniel has steadily progressed and developed the skills to earn this senior position including earning his MBA and CPCM certification.



## Sophia Hurst: Procurement Services Coordinator

Sophia, who graduated with a BA from the University of Oregon in 2013 (with a concentration in Marketing) has been a tremendous member of Support Services for the past three years. In this new role, she will continue to support our entire department, but in a new and expanded way. She will manage all training/forums/workshops; coordinate outreaches; develop content and prepare communications for our website, newsletter, and email announcements; serve as a liaison between Procurement Services and suppliers, coordinate supplier showcases and annual fairs; and provide system and office support as needed.



# P-Card and Travel Services

## Reimbursing Consultants/Independent Contractors

Travel expenses for Independent Contractors or Consultants that have a US Trade or Business should not be processed in CardQuest. A purchase requisition should be completed in Techmart. Independent Contractors and Consultants should include their travel expenses and fees together when billing the Institute.

For more helpful information [click here](#) for CardQuest FAQs

## How to Pay Relocation Expenses

Relocation reimbursements are paid on a payment request through the Specialty Team. A P-Card should not be used to pay for relocation expenses.

For more helpful information [click here](#) for CardQuest FAQs

## Hotel and Event Contracts

Please do not sign contracts for lodging or hotel/conference events. Purchasing Services is responsible for reviewing and signing all hotel/event contracts. Such contracts generally have built in attrition rates and failure to properly negotiate them can lead to substantial penalty expenses for unused hotel rooms.

Please contact travel staff if you have questions.

## New Hours of Operation for CTP



**CORPORATE TRAVEL PLANNERS**

A BRANCH OF THE TZELL TRAVEL GROUP

TRAVEL  LEADERS\*

Starting September 19, 2016 CTP has changed their business hours.

**New hours will be: 6:00 A.M.—5:00 P.M.**

New key tags will be made to reflect this change and sent out to travelers.



BOOK VIA



- Email Confirmations
- Available Worldwide
- Flight Tracking
- Professional Drivers
- E-Receipts
- 24/7 Customer Support

## Procurement Services - Consider it Done!

### Contact Us

#### Procurement Hotline

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