

# PROCUREMENT NEWS

Procurement Services Newsletter

April 2017



This month Payment Services is replacing ImageNow/WebNow with FileBound. To learn more about FileBound, [click here](#).

During the transition, we are carefully accounting for and moving every invoice from one system to another. We have trained most approvers who will be managing a queue, like they did in ImageNow/WebNow. During the transition, we expect no interruption in payment to our supplier community, however, if something seems to be missed, please contact the Procurement Services Hotline right away and we will investigate.

If you would like training or a demo of the system, please let us know and we can arrange to come to your group for a demonstration. If you have any questions, please email [FileBoundHelp@caltech.edu](mailto:FileBoundHelp@caltech.edu) or call the Hotline at 626-395-8900. Thank you!

## WE HEARD YOU

And have made some changes in TechMart we think you will appreciate!

The screenshot displays the TechMart website interface. On the left, there is a 'TechMart News' sidebar with a mobile app promotion and quick links. The main content area features a 'Shop' header with a search bar and navigation tabs for 'Shortcuts' and 'Browse'. Below this is a 'Document Search' section and a 'Caltex Catalog Suppliers' list with expandable categories like 'Compressed Gas', 'Office Supplies', and 'Electronic Components'. On the right, there is a 'Can't find what you are looking for?' section with contact information and a list of 'Organizational Forms'.

*In early April, TechMart will feature this new homepage. More details on page 2.*

# Purchasing Services

## TechMart Homepage: Continued from page 1...

TechMart Dashboard Enhancements include:

- New “Widget” Homepage, to improve easy shopping experience.
- Punch-Out and Hosted Catalog Suppliers are now categorized by commodity within collapsible showcases.
- Forms can be found under the “Organizational Forms” widget on the right side of the screen, in addition to the “forms” link under the Shop Menu.
- The Organization Message Board on the left will feature helpful links to common Procurement topics for quick reference.
- Easily accessible “help” widget to direct you to a Procurement Services Representative.
- Debuting 3 new Catalog Suppliers:



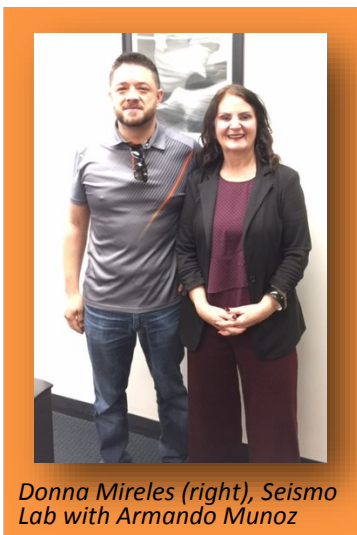
## New Hire: Welcome Kelly Lam!



Purchasing Services’ Subaward Team is very happy to announce its newest member, Kelly Lam. Kelly, who has been with Caltech since 2012 has served in the Office of Sponsored Research in a few capacities. Beginning as a Data Specialist, then a Contract and Grant Assistant, to her current role, as a Contract and Grant Analyst, which she was promoted to in 2015. Kelly has a Bachelor’s degree in Psychology, Psychobiology, and Sociology from the University of California, Los Angeles. On April 17, 2017, Kelly will begin her new role as a Contracting Officer, where she will prepare and issue Caltech’s research subawards.

## TechMart Survey Winners

Thank you to all our users who participated in the TechMart customer service survey. We greatly appreciate your feedback. Congratulations to our two survey winners!



*Donna Mireles (right), Seismo Lab with Armando Munoz*

*Shauna Lane (left), Student Affairs with Rachel Fisher*



## Shop Specially Priced Featured Products from the Office Solutions Supplier Show!

Office Solutions has a limited time promotion where favorite products from their supplier show at Caltech will be offered at special discounted prices. Login to **TechMart** and shop in their new Punch-Out today!



## Purchasing Services continued...

### Introducing Amazon Business

Everything you love about Amazon. Tailored for Caltech!

- \* Enjoy **FREE two-day shipping** over \$49 or extend your personal Prime account
- \* **Exclusive access** to millions of additional products, sellers, and discounted pricing not available through Amazon.com
- \* **Enhanced reporting** to easily track and manage spend

To request an Amazon Business account, please contact Sophia Hurst at [shurst@caltech.edu](mailto:shurst@caltech.edu).

### Coming Soon: Training Classes and Material

We have developed a range of training classes and material for campus to utilize. Training classes will be listed and explained under the *Events* section on the [Procurement Services](#) webpage with corresponding online material. Classes will be available for sign up by June 2017.

## P-Card and Travel Services

### Policy Updates

**Gift Cards**—Payroll will be notified of all gift card purchases to Caltech personnel. Per IRS Publication 15-B: Cash and cash equivalent items provided by the employer are included as income.

**Smart Cash**—Adding funds to UID cards is prohibited.

**New low limit cards**—A card issued to an individual or department with a low monthly limit. The spend limit is based on the needs of the department. Departmental cards will be established under the profile of an existing cardholder.

**Cash Advance Fees**—Travelers will now be responsible for the 2.5% cash advance fee.



### Announcement: Cash Advance Fees

Effective this month, the 2.5% Cash Advance fee charged by our new bank, U.S. Bank, will be charged directly to the cardholder. The Cash Advance fee will come through as a P-Card transaction and should be reconciled to the corresponding travel expense report.

### Procurement Services—Consider it Done!

#### Contact Us

##### Procurement Hotline

(626) 395 - 8900

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