

Wiltshire Council

Guide to Purchasing

Owner: Corporate Procurement Unit

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Version: 1.1

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Foreword

Wiltshire Council is committed to improving the way the spends it money on bought in goods and services and during financial year 2009-2010 we expect to spend approximately £300M.

Spending at this level presents us with a number of challenges and a number of opportunities for improvement. By using SAP SRM it promises to provide the new council with greater visibility over its spend and greater opportunity to manage that spend in a way that benefits the council and the communities it serves.

It is critical to the new council that it embraces a new approach to purchasing. Adopting improved methods of purchasing through a Category Management approach will provide us with ability to develop the markets with which we do business, to generate efficiencies and to improve the service that we deliver to our customers.

This guide provides you as the user with the basic information you will need to help make the desired improvements. For further information or help on using this guide please contact the Corporate Procurement Unit.

Please ensure you check this document at regular intervals as we will be continuously updating it to reflect changes to process and category policies.



Mike Swabey

Head of Procurement and Contract Management

1st April 2009

Link to Procurement Strategy – [Insert Link Here](#)

Note from Mike Pankiewicz

BMP Team

The SAP SRM Org Structures have been agreed with Directorates. Where the structure does not fit within the SAP SRM model and the service areas have adapted it to rely on active user intervention to approve shopping carts, it is the responsibility of that Service Area to ensure that shopping carts are dealt with quickly and efficiently.

The approving managers that form part of this solution should be made fully aware of their responsibility by their Change Managers.

Requisitioners must also be responsible for contacting their approving managers where a shopping cart has not been approved within a timely manner

Version Control

Date	Version	Author	Amendments
1/4/09	1.0	Paul Smith	SAP SRM Go Live Version
14/4/09	1.1	Paul Smith	Updated Design & Print Process

Purchasing Charter

Corporate Procurement and Category Managers will be able to maintain, manage and review existing contracts as well as use the rich and accurate management information from purchase orders to obtain new value contracts and prices.

By using contracts managed by Procurement and Category Managers Service Areas will ensure that best value is achieved for the council, not doing so and spending off contract Service Areas will be contribute towards poorly managed spend.

Placing purchase orders on SAP SRM will mean Wiltshire Council will reduce its financial risk by knowing its commitments at placement of order.

You can expect Procurement to:

- Be friendly, helpful and informative
- Provide purchasing advice on which contracts and suppliers should be used working closely with Category Owners and Managers
- Challenge purchase orders that do not meet Contract Standing Orders, Procurement guides or incur off-contract spend
- Inform purchasers of new contracts and catalogues with face to face meetings, emails and the intranet
- Monitor purchasing and report non compliance to Heads of Service
- Assign product categories to suppliers where there is no off-contract spend, to reduce unnecessary process time
- Query (Reject) shopping carts for resubmitting when the wrong product category has been used
- Make available catalogues and contracts on the IDeA Marketplace

What we expect from our services

- Heads of Service and Category Managers to take purchasing responsibility for their service areas to achieve best value for Wiltshire Council and commit to reducing off-contract expenditure
- Contracts to be used to ensure off-contract spend does not occur
- Suppliers assigned categories are used
- To comply with Contract Standing Orders and Purchasing Contract Regulations and other guidance
- To ensure that all commercial transactions are placed using a Purchase Order
- Commitments are placed on SAP SRM at the point of making the commitment and not when the invoice is presented
- To only use retrospective purchase orders when there a reasonable operational reason to do so
- To use product categories with accuracy, to assign categories for what has been bought and not what budget the spend is spent against.
- Regularly review your purchases

Ten procurement protocols you need to know

SAP is here to help you. It will make the buying of goods and services more transparent, more efficient and more straight-forward, although, like all new ways of working, it will take some time for everyone to become familiar with it.

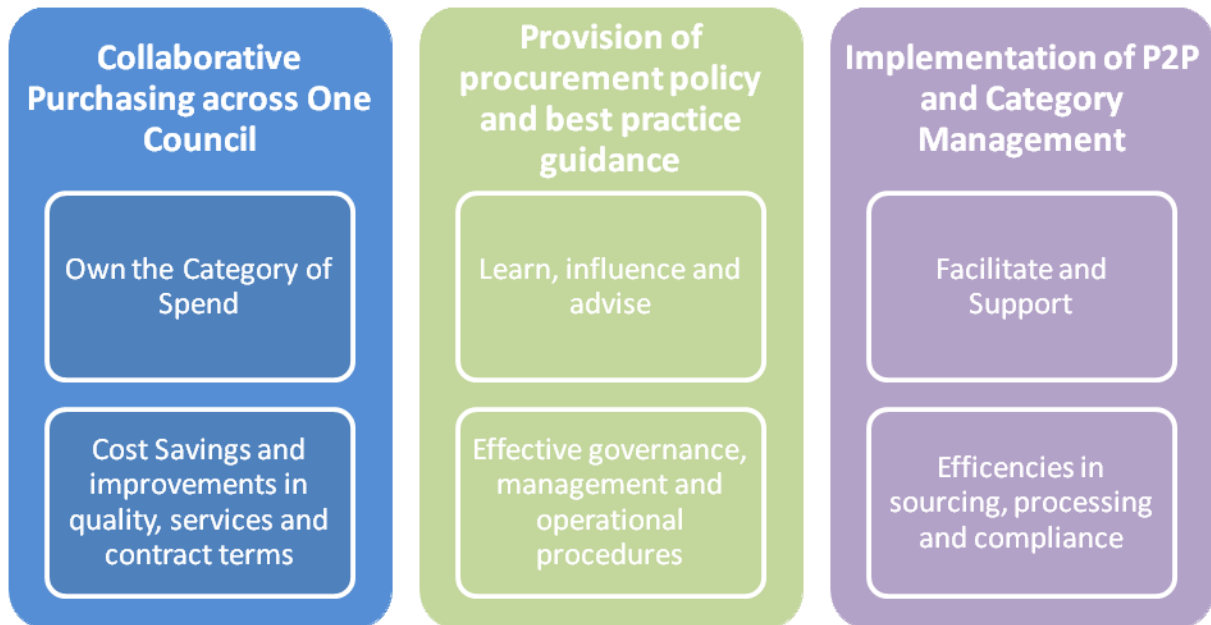
There are, however, certain procurement protocols that all staff should be aware of:

1. Purchasing of all goods and services must be carried out through SAP Supplier Relationship Management (SRM), unless it has been previously agreed to purchase via one of the following line of business systems:
 - *GVA* – Property Maintenance (TEL)
 - *Simdel* – Housing (EDPH)
 - *Routewise* – Passenger Transport (TEL)
 - *Exor* – Highways maintenance (TEL)
 - *Galaxy* – Library book orders (DCS)
2. Staff must no longer use paper order pads.
3. All purchase orders must be approved by a manager, unless under £100 and approval can only be delegated upwards or sideways within SAP.
4. Only Requisitioners can initiate the ordering of goods and services through SAP. All Requisitioners have been allocated and trained.
5. Requisitioners cannot approve their own requisitions.
6. Only Buyers can amend purchase orders.
7. Goods Receipts for confirmation of delivery must be entered into SAP promptly by the requisitioner or buyer\authorised person; failure to do so will result in delays in making payments.
8. Invoices will be sent to SST by suppliers for processing, except where there is an explicitly agreed alternative. SST will enter the invoice into SAP and match it to the Purchase Order and the Good Receipt (a 'three way match'). All mismatched invoices are automatically blocked by SAP and this will instigate a resolution process. Cut-over instructions have been provided to Departments.
9. Invoices received without SAP Purchase Order numbers (because SAP was not used) will be returned to the supplier.
10. Staff are expected to familiarise themselves with the new ways of working for procurement and to adhere to the new guidelines from 1st April 2009.

For further advice on how to use SRM, please see the procurement guidance on The Wire.

Purchase to Pay and Category Management

Wiltshire Council has implemented SAP SRM as its purchasing system. The SAP SRM is a Purchase to Pay system (P2P) that includes Category Management.



What is P2P?

P2P is the name of the process to purchase effectively and efficiently. The process starts with a need or a requirement; this is entered in to a shopping cart.

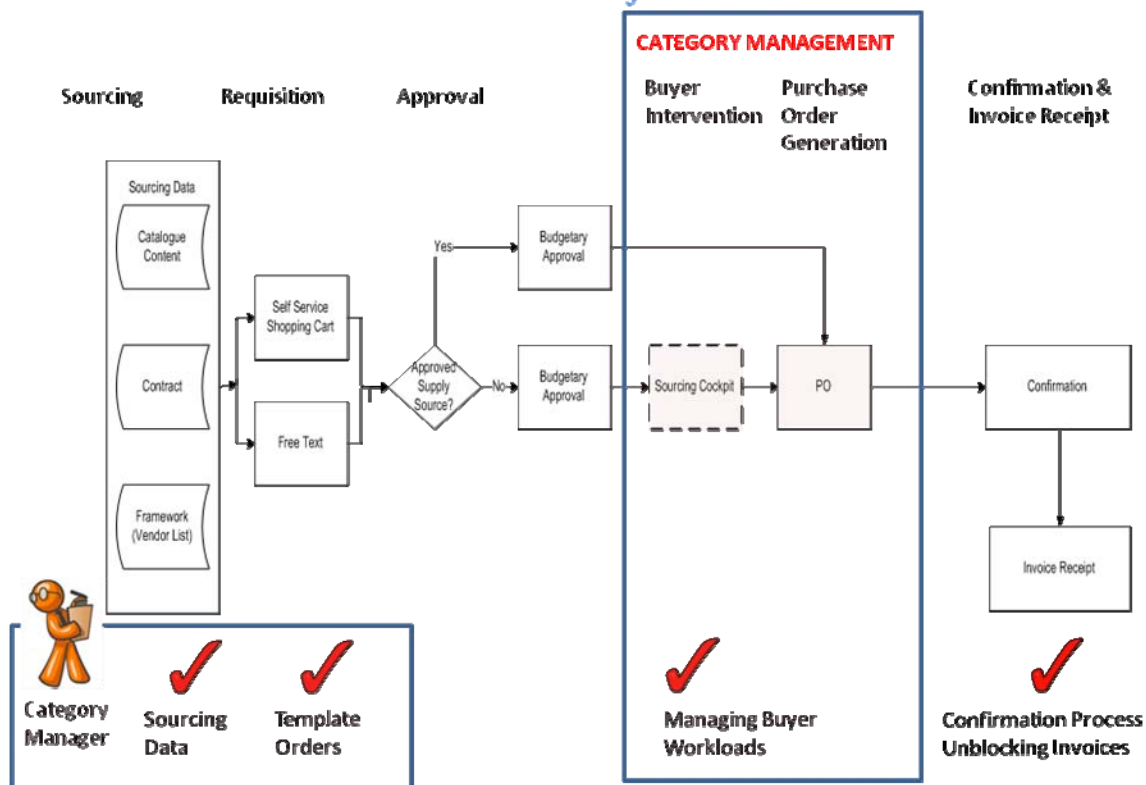
P2P works in two ways, pre approved content and suppliers (**Green Route**) and then suppliers and items requiring further approval (**Red Route**).

At Stage 1 of the shopping cart the purchaser enters the requirement (goods or service) and adds a Product Category, (Each product category is linked to a Category Manager). As well as other supporting information such as price etc.

At Stage 2 of the shopping cart the purchaser can then add the supplier (if known). If the Supplier has gone through category approval process, the shopping cart is sent through SAP SRM electronically to the financial approver. If the supplier is not on the category assigned or contract list the shopping cart is sent for category approval before being sent to the supplier.

Goods can also be chosen from catalogues and links to suppliers websites within the SAP SRM environment. In this case the goods and services are pre category approved. By using pre approved content the purchase process can be quick and efficient.

Purchase to Pay Process



Green Route - The choice of supplier and chosen product category match a pre assigned list and no further category approval required.

Red Route - The choice of product category and supplier are not yet matched or approved by a Category Manager, further approval required.

Category Management

The P2P process has two levels of approval, financial and category. Most purchasers will be familiar with financial approval, passing a requisition to a budget manager to approve up to a certain value. However there is now another level of approval, Category approval.

Financial approval is usually based on the questions, “is there enough money in my budget?” or “Do we have the money to spend on this purchase?”. Category Management approvals usually ask some of the following questions:

“Why are we making this purchase?”

“Why are we using this supplier?”

“Is there an alternative source we can use?”

“Can this be purchased from an existing contract?”

The Purchase to Pay Benefits

By implementing P2P and Category Management we will achieve:

- ✓ Savings through purchasing with all service areas therefore taking advantage of contracts with economies of scale purchasing
- ✓ Savings through usage of contracts – making them visible to purchasers to ensure negotiated contract value targets are reached
- ✓ Controlling off contract expenditure by managing suppliers that purchasers can order from.
- ✓ Standardisation and uniformity of items, products and services purchased by the use of catalogues and supplier content
- ✓ Savings through systems that are easy to use and accurate thus reducing time spent procuring or sorting out purchase orders and invoices
- ✓ Management information that is accurate and can be used for better procurement management
- ✓ To meet the aims and objectives of Wiltshire Council
- ✓ Security – anti fraud and segregation of duties through approval
- ✓ Cost savings through process
- ✓ Purchase Orders sent electronically by email, reducing the purchasing time and postage costs
- ✓ All Purchases owned by a Category Manager, specialist within their spend area

Current Purchasing Situation – April 2009

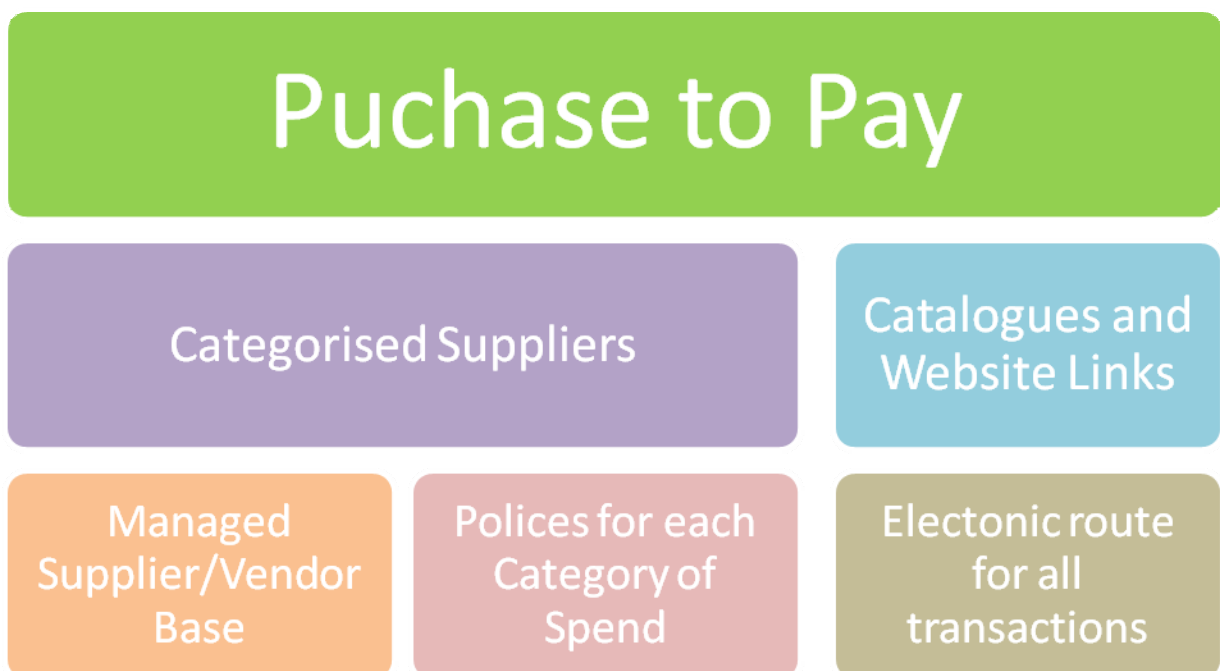
We are at the beginning of the P2P journey, many of the benefits we want to achieve will come but first we must populate the SAP SRM system with useful information.

Merging five local authorities at the same time is ambitious with many challenges to be overcome before full benefits can be achieved.

With five separate finance systems there is little in the way of useful purchasing information, category purchasing has never been used. The process of purchasing has been different for each authority and again different between the service areas and departments within those authorities.

There has been little joined up management for the purchases of each council. The incumbent systems have allowed poor purchasing practice, for one service area to buy the same goods from the same supplier at different prices, or even from different suppliers thus losing the chance to get better prices by combining the purchasing.

To obtain all the benefits of P2P we must start on a journey to put in place all the building blocks for purchasing.



At the beginning of the P2P journey we have already:

- Over 4000 categorised and active suppliers for green route purchasing
- Interim Category Managers to approve purchasing
- Over 500 Product Categories
- A substantial number of supplier email addresses to receive purchase orders

The P2P Journey

There is an ongoing process to ensure that benefits are obtained quickly:

- **One Time Category Approval.** When a supplier is used for the first time with a product category, a Category Manager will work with the Buying Teams to ensure that approval or rejection is given. If approval has been given and the use of the supplier/category combination is acceptable the supplier and product category will be added onto SAP SRM so further purchasing will not require category approval.

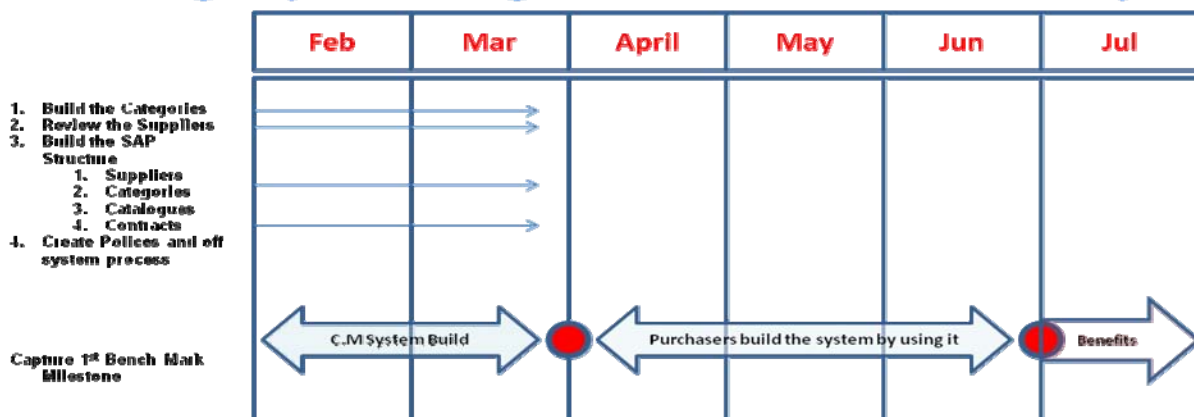
- **Categorised Content.** The Corporate Procurement Unit is working with the Category Manager and Buying Teams to ensure that any items that are purchased frequently from contracts are put into catalogues. This process has started with existing vendors and will continue with every new contract.

- **Interim Roles.** Current interim roles of Category Managers and Buyers will in time be replaced by permanent positions.

- **Capture Important Data.** When a supplier is used for the first time we will contact that supplier and collect any missing information (purchase order email addresses, etc) to ensure good quality data and maximise the use of electronic purchasing.

- **Review.** CPU and Category Managers will meet frequently to review and refine the current process, content and suppliers.

Category Management – The Journey



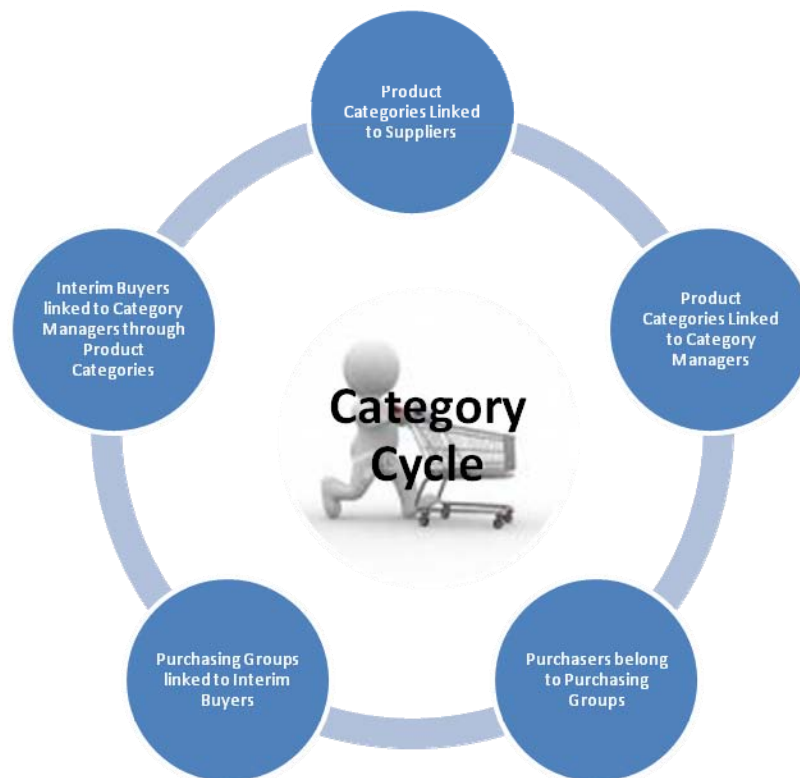
The weeks and months leading up to April 1st are our opportunity to build the SAP System, to load the suppliers and contracts.

Post April 1st until June, the system is "tweaked", process re-aligned, and SRM populated with spend data. 3 months worth of purchasing will allow us to produce our first purchasing benchmark

Category Management Explained

Category Management is the process of managing purchasing by:

- Purchasing collaboratively by joining up purchasing and contracts
- Category Managers taking ownership of areas of spend
- Spend areas managed by specialists
- Manage all spend across Service Areas and Departments to reduce off contract and ad-hoc spend



Category Managers usually sit within the service areas that create the largest spend within their categories

They will manage:

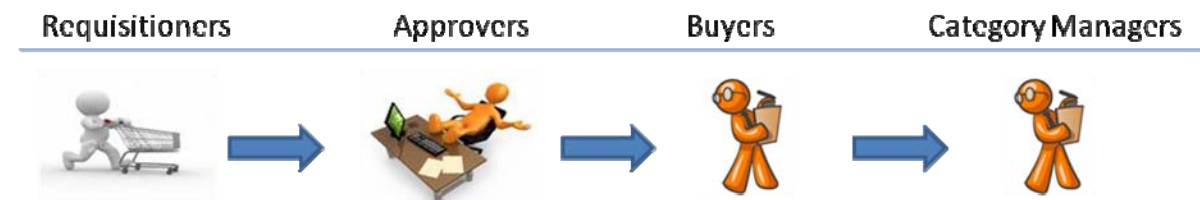
- The suppliers/vendors/providers linked to their categories
- Who can use and cannot be used
- Decisions on the supplier base in each category ultimately lies with Category Managers and the Service areas, supported by CPU

Each product category is linked to a Category Manager who has the ability to approve and reject shopping carts and vendors within their categories.

Category Managers can challenge the use of a supplier or the purchase of a service or item and can also support the interim buyers in sourcing goods and services when a supplier is not yet known.

Who is affected by Category Management

- People that currently order or requisition goods and services
- Council employees who approve shopping carts
- The impact will be:
 - When trying to use a new supplier, it will now need approval from a Category Manager
 - When using a supplier that has not been given the product category assigned to it, the shopping cart will be challenged
 - Purchasing will be led by category and not by budget. Shopping basket lines must be correctly categorised



The IDeA Marketplace

The SAP SRM process is very similar to online purchasing which will be familiar to most purchasers. In much the same way as going to onto Amazon or tesco.com Wiltshire purchasers can do the same with pre-sourced content. The catalogues will be accessed via a link on the Shop page of SAP SRM called the IDeA Marketplace.

The marketplace is a separate system that allows our suppliers to upload their goods and services into a catalogue.

Using the marketplace is much the same as shopping online. Here you can browse for goods and services by searching through categories or you can search using words.

You can also view a suppliers catalogue and see what they have online.

As we begin to obtain the purchasing information from the shopping carts and purchase orders, we will be able to convert many suppliers goods and services into in to catalogues.

If you currently use paper catalogues or buy online please inform CPU as they will look to work with the vendors to transfer the catalogues to the IDeA Marketplace.

Category Management Structure

The expenditure for the whole one council has been divided into two main areas of spend and then 21 main categories of spend:

Frontline Services:

- Adult Care
- Amenities
- Children & Education
- Community
- Environmental
- Highways
- Housing
- Learning & Development
- Legal
- Leisure
- Passenger Transport
- Transport Operations
- Waste Collection
- Waste Disposal

Operational Support

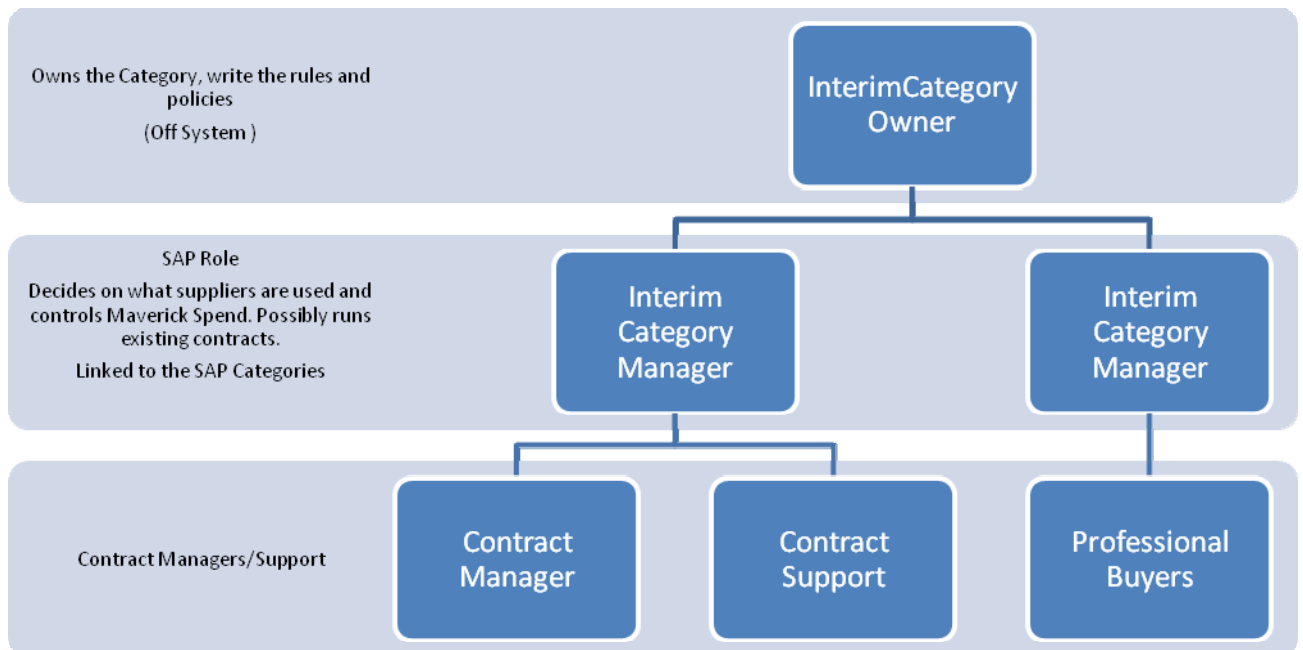
- Building Construction & Maintenance
- Corporate Contracts
- Design, Print & Communications
- Finance
- Human Resources
- ICT

The spend is broken down into what Wiltshire Council actually buys and is not based on Service area, however in most cases the Service Areas with the largest spend will be home to Category Manager and the high level category fits naturally within that area.

Each Spend Category has an Interim Category Owner and usually one or more Category Managers.

- Each Category will have an Interim Category Owner
- Spend categories will have sub-category groups
- Sub-categories will have SAP Category Managers
- SAP Category Managers will manage a list of SAP Categories

Interim Category Manager Roles



Sub-Categories

- Category Owners will be supported by the SAP Category Managers that manage the sub-categories under their umbrella category

- Example: Legal and Democratic – Category Owner Head of Legal

Sub Category	SAP Category	SAP Code	SAP Category Manager
Legal	Legal Services	80120000	Kerry Charters
	Business Law Services	80121600	Kerry Charters
Legal (Property)	Conveyancing Service	80131701	A N Other
	Estate Agents Fees	80131600	A N Other
Coroners	Funeral Services	83102000	Dorothy Anderson
	Post Mortem Services	42260000	Dorothy Anderson

Category Spend with Sub Categories

Category Area	Sub Category	Interim Category Owner	Interim Category Manager
Amenities	Countryside	Ian Brown	Ian Brown
Amenities	Parks	Ian Brown	Ian Brown
Amenities	Technical	Ian Brown	Ian Brown
Building Construction & Maintenance	Building Construction	Phil Durston	Neil Ward
Building Construction & Maintenance	Building Maintenance	Phil Durston	Phil Durston
Care Operations - Adult	Care Homes	Lesley Entwistle	Lesley Entwistle
Care Operations - Adult	Client Wellbeing	Lesley Entwistle	Lesley Entwistle
Care Operations - Adult	Clothing & Apparel	Lesley Entwistle	Lesley Entwistle
Care Operations - Adult	Community Communications	Lesley Entwistle	Lesley Entwistle
Care Operations - Adult	Community Equipment	Lesley Entwistle	Lesley Entwistle
Care Operations - Adult	Dom Care	Lesley Entwistle	Lesley Entwistle
Care Operations - Adult	Educational Services	Lesley Entwistle	Lesley Entwistle
Care Operations - Adult	Healthcare	Lesley Entwistle	Lesley Entwistle
Care Operations - Adult	Laundry & Domestic Cleaning	Lesley Entwistle	Lesley Entwistle
Care Operations - Adult	Medical Services & Equipment	Lesley Entwistle	Lesley Entwistle
Children & Education	Care Homes	Lesley Entwistle	Lesley Entwistle
Amenities	Catering	Liz Williams	Liz Williams
Children & Education	Client Services	Lesley Entwistle	Lesley Entwistle
Children & Education	Client Wellbeing	Lesley Entwistle	Lesley Entwistle
Children & Education	Clothing & Apparel	Lesley Entwistle	Lesley Entwistle
Children & Education	Community Communications	Lesley Entwistle	Lesley Entwistle
Children & Education	Community Equipment	Lesley Entwistle	Lesley Entwistle
Children & Education	Dom Care	Lesley Entwistle	Lesley Entwistle
Children & Education	Educational Equipment	Liz Williams	Liz Williams
Children & Education	Educational Services	Lesley Entwistle	Lesley Entwistle
Children & Education	Educational Services	Liz Williams	Liz Williams
Children & Education	Healthcare	Lesley Entwistle	Lesley Entwistle
Children & Education	Laundry & Domestic Cleaning	Lesley Entwistle	Lesley Entwistle
Children & Education	Learning & Development	Liz Williams	Liz Williams
Children & Education	Medical Services & Equipment	Lesley Entwistle	Lesley Entwistle
Community	Client Services	Simon Jeffery	Simon Jeffery
Community	Community Organisations	Simon Jeffery	Simon Jeffery
Corporate Procurement	Corporate Contracts	Mike Horgan	Mike Horgan
Corporate Procurement	Meeting & Accommodation	Mike Horgan	Mike Horgan
Corporate Procurement	Travel	Mike Horgan	Mike Horgan
Design & Print & Communications	Advertising	Nick Weeks	Nick Weeks
Design & Print & Communications	Electronic Media	Nick Weeks	Nick Weeks
Design & Print & Communications	Electronic Media	Nick Weeks	Nick Weeks
Design & Print & Communications	Graphic Design	Nick Weeks	Nick Weeks
Design & Print & Communications	Interpreters	Nick Weeks	Nick Weeks
Design & Print & Communications	Marketing	Nick Weeks	Nick Weeks
Design & Print & Communications	Paper & Materials	Nick Weeks	Nick Weeks

Design & Print & Communications	Photography	Nick Weeks	Nick Weeks
Design & Print & Communications	Printed Product	Nick Weeks	Nick Weeks
Design & Print & Communications	Printing Equipment	Nick Weeks	Nick Weeks
Design & Print & Communications	Repro	Nick Weeks	Nick Weeks
Design & Print & Communications	Signage	Nick Weeks	Nick Weeks
Environmental	Agriculture	Robin Foster	Robin Foster
Environmental	Environmental Services	Garry King	Garry King
Environmental	Monitoring	Robin Foster	Robin Foster
Environmental	Planning	Robin Foster	Robin Foster
Finance	Accounting	Adrian Rutter	Adrian Rutter
Finance	Advice & Analysis	Adrian Rutter	Adrian Rutter
Finance	Insurance	Adrian Rutter	Adrian Rutter
Highways	Road Construction	Peter Binley	Peter Binley
Highways	Security & Safety	Peter Binley	Peter Binley
Highways	Street Scene	Peter Binley	Peter Binley
Housing	Housing Contracts	Nicole Smith	Nicole Smith
Human Resources	Business management	Joanne Pitt	Joanne Pitt
Human Resources	Recruitment	Joanne Pitt	Joanne Pitt
Human Resources	Temp Staff	Joanne Pitt	Joanne Pitt
ICT	Audio & Visual	Louise Asher	Louise Asher
ICT	Hardware	Louise Asher	Louise Asher
ICT	IT Services	Louise Asher	Louise Asher
ICT	Software	Louise Asher	Louise Asher
ICT	Telephony	Louise Asher	Louise Asher
Learning & Development	L&D Consultants & Services	Nichola Chitson	Nichola Chitson
Learning & Development	Training & Meeting Accommodation	Nichola Chitson	Nichola Chitson
Legal	Coroners	Barbara Mills	Dorothy Anderson
Legal	Legal Practice & Operations	Barbara Mills	Kerry Charters
Leisure Operations	Catering	Robin Townsend	Robin Townsend
Leisure Operations	Leisure Consultants	Robin Townsend	Robin Townsend
Leisure Operations	Sports & Entertainment	Robin Townsend	Robin Townsend
Transport Operations	Contracts	Paul Smith (Highways)	Paul Smith (Highways)
Transport Operations	Driver Training	Paul Smith (Highways)	Paul Smith (Highways)
Transport Operations	Fleet Services	Paul Smith (Highways)	Paul Smith (Highways)
Transport Operations	Fuels & Oils	Paul Smith (Highways)	Paul Smith (Highways)
Transport Operations	Passenger Transport	Jason Salter	Jason Salter
Transport Operations	Servicing & Repair	Paul Smith (Highways)	Paul Smith (Highways)
Transport Operations	Vehicle Rental & Lease	Paul Smith (Highways)	Paul Smith (Highways)
Transport Operations	Vehicles	Paul Smith (Highways)	Paul Smith (Highways)
Transport Operations	Vehicles Components	Paul Smith (Highways)	Paul Smith (Highways)
Transport Operations	Workshop	Paul Smith (Highways)	Paul Smith (Highways)
Waste Services	Collection	Adrian Hampton	Adrian Hampton
Waste Services	Disposal	Andy Conn	Martin Litherland

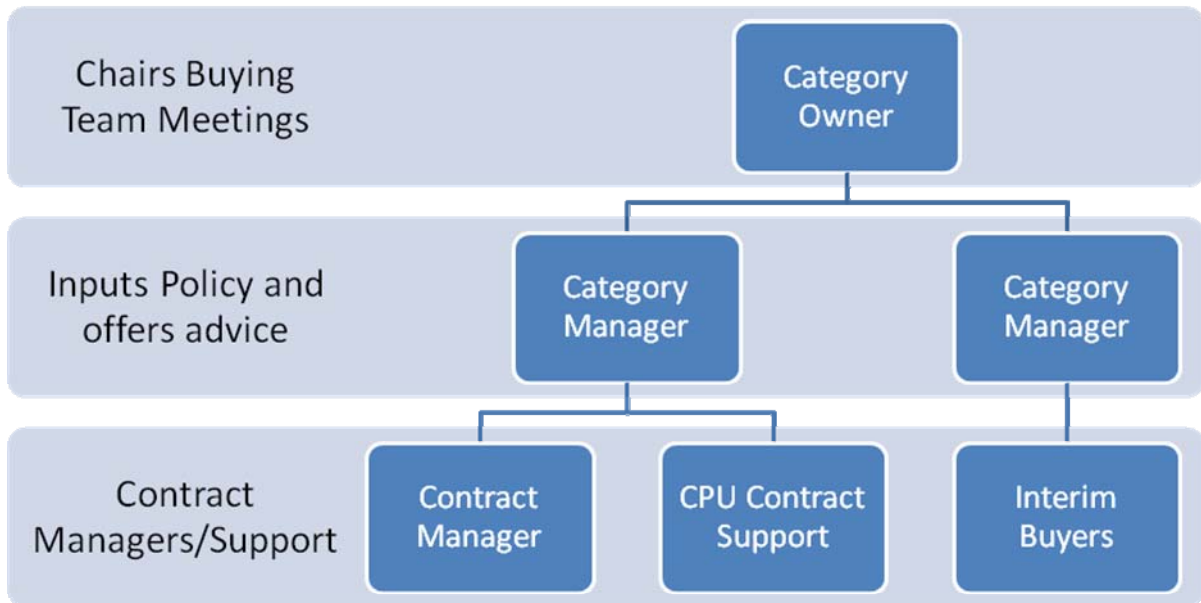
Category Contact Directory

Directory	Category	Email Address	Telephone
Ian Brown	Amenities	Ian.S.Brown@Kennet.gov.uk	
Phil Durston	Building Construction & Maintenance	phildurston@wiltshire.gov.uk	01225-713221
Simon Jeffery	Care	simonjeffery@wiltshire.gov.uk	01225 771605
Lesley Entwistle	Care	lesleyentwistle@wiltshire.gov.uk	01225 718549
Mike Horgan	Corporate Procurement	MikeHorgan@wiltshire.gov.uk	01225 713245
Nick Weeks	Design, Print & Communications	nickweeks@wiltshire.gov.uk	01225-713493
Liz Williams	Education	elizabethwilliams@wiltshire.gov.uk	01225 713675
Robin Foster	Environmental	rfoster@northwilts.gov.uk	01249 706545
Garry King	Environmental	GarryKing@wiltshire.gov.uk	01225 713232
Adrian Rutter	Finance	AdrianRutter@wiltshire.gov.uk	01225 713604
Peter Binley	Highways	peterbinley@wiltshire.gov.uk	01225-713412
Nicole Smith	Housing	NSmith@westwiltshire.gov.uk	01225 776655 ext 567
Jo Pitt	Human Resources	joanepitt@wiltshire.gov.uk	01225 713167
Louise Asher	ICT	louiseasher@wiltshire.gov.uk	01225 718049
Nichola Chitson	Learning & Development	nicholachitson@wiltshire.gov.uk	01225 771655
Kerry Charters	Legal	kerrycharters@wiltshire.gov.uk	01225-713031
Dorothy Anderson	Legal - Coroners	DorothyAnderson@wiltshire.gov.uk	01225-718028
Robin Townsend	Leisure	RTownsend@salisbury.gov.uk	01722 434666
Jason Salter	Passenger Transport	jasonsalter@wiltshire.gov.uk	01225 713334
Paul Smith (Highways)	Transport Operations	PaulSmith@wiltshire.gov.uk	01225 713271
Andy Conn	Waste	andyconn@wiltshire.gov.uk	01225-713422
Martin Litherland	Waste	martinlitherland@wiltshire.gov.uk	01225 718524
Adrian Hampton	Waste	Adrian.Hampton@kennet.gov.uk	
Sandra Truscott	Waste	sandratruscott@wiltshire.gov.uk	01225-713328

Buying Teams

As part of the Category Management structure we will have specialist buying teams to support the day to day purchasing within Wiltshire Council.

Buying Teams Roles



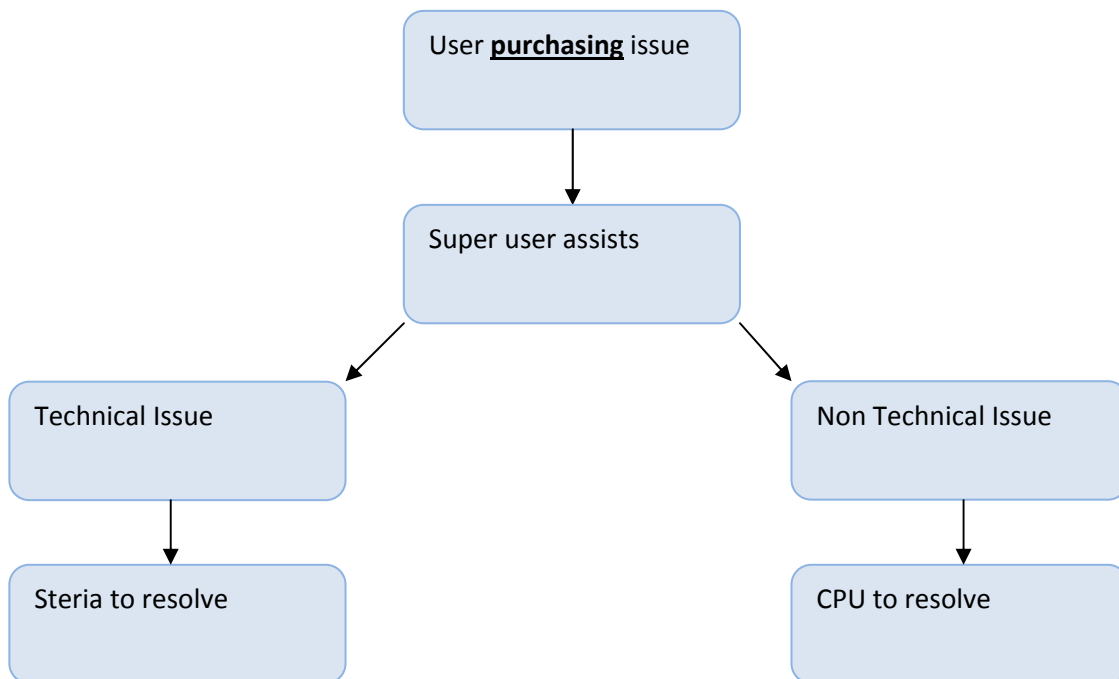
During the first few months after April, we will be collecting purchasing data that Buying Teams can use when they meet and review the purchases.

They will use the management information to decide on what policies need to be written and how to communicate these to the purchasing community.

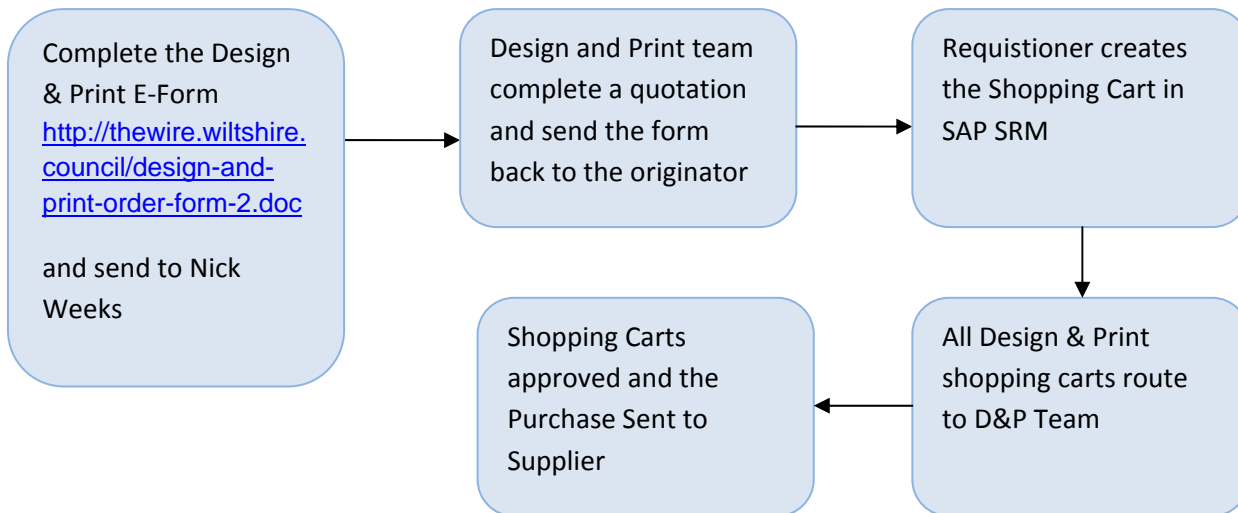
Purchasing Support

The initial point of contact for all process and purchasing queries should sit with you super users.

Super Users will be issued with guidance on who to contact within the Corporate Procurement Unit for dealing with issues relating to purchasing other than technical ICT issues that will be dealt with by the SAP Support team through the Steria Helpdesk.



Purchasing Design & Print



Design, Print and Communications Categories

14000000	Paper Materials & Products
45100000	Printing & Publishing Equipment
55100000	Printed Media
55101503	Catalogues
55101518	Plans & Drawings
55120000	Signage & Accessories
73151900	Printing Internal - Internal Trading Costs
80140000	Marketing & Distribution
80141605	Promotional Merchandise
80141700	Distribution
80141900	Shows & Exhibitions
82000000	Design & Consultancy
82100000	Advertising
82110000	Translations (Written & Copyrighting)
82111900	News & Publicity Services
82121500	Printing
82121700	Photocopying
82121900	Bookbinding
82130000	Photographic Services
82140000	Graphic Design
86101701	Communications Agency

Purchasing Temporary Staff and Recruitment

Temporary Agency Staff Framework Agreement

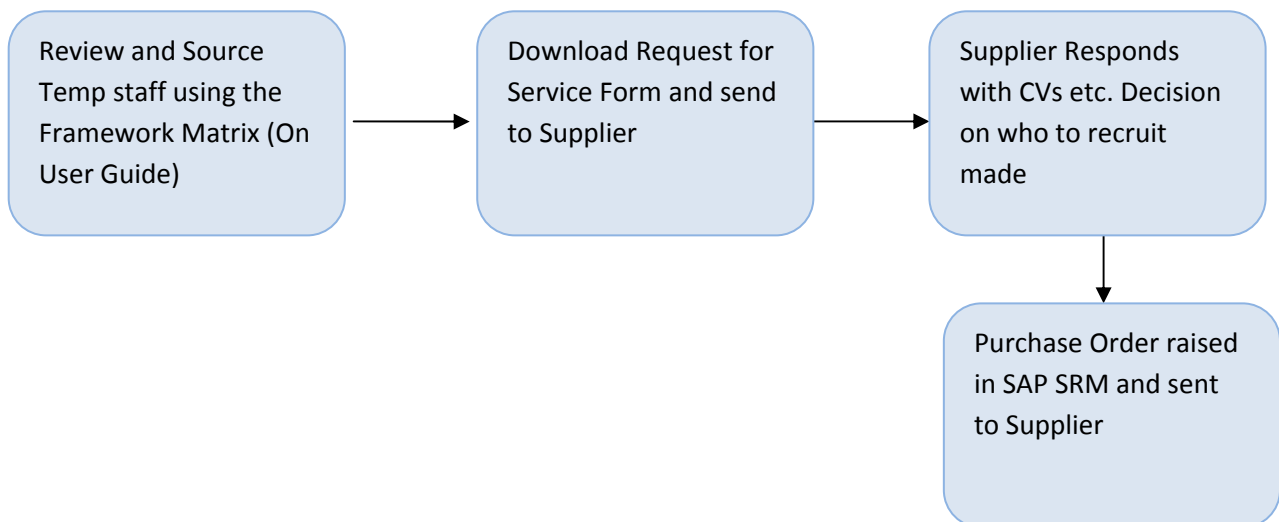
The Council has collaborated with Bath and North East Somerset Council to establish a framework agreement with recruitment agencies for the supply of temporary staff across the sub-region. Previously expenditure on temporary staff was spread across a large number of suppliers, with inconsistent rates, fee structures and processes applied. With the introduction of the Framework Agreement the number of temporary staff suppliers have been rationalised to just ten suppliers across eleven categories of staff.

Some of the anticipated benefits of the new framework agreement are:

- Efficiencies from streamlining of processes;
- Revenue savings;
- Quality, experienced staff – savings are derived by cuts to agency commissions not staff rates of pay;
- A single point of contact within the Council to make sure the contracts run smoothly;
- Dedicated agencies for particular job roles – making it easier to find the right staff;
- Cold calls from non listed agencies will reduce as news of the framework becomes known

A User Guide for booking Temporary staff can be found here [\(LINK\)](#).

A Request for Service form can be found here [\(LINK\)](#).

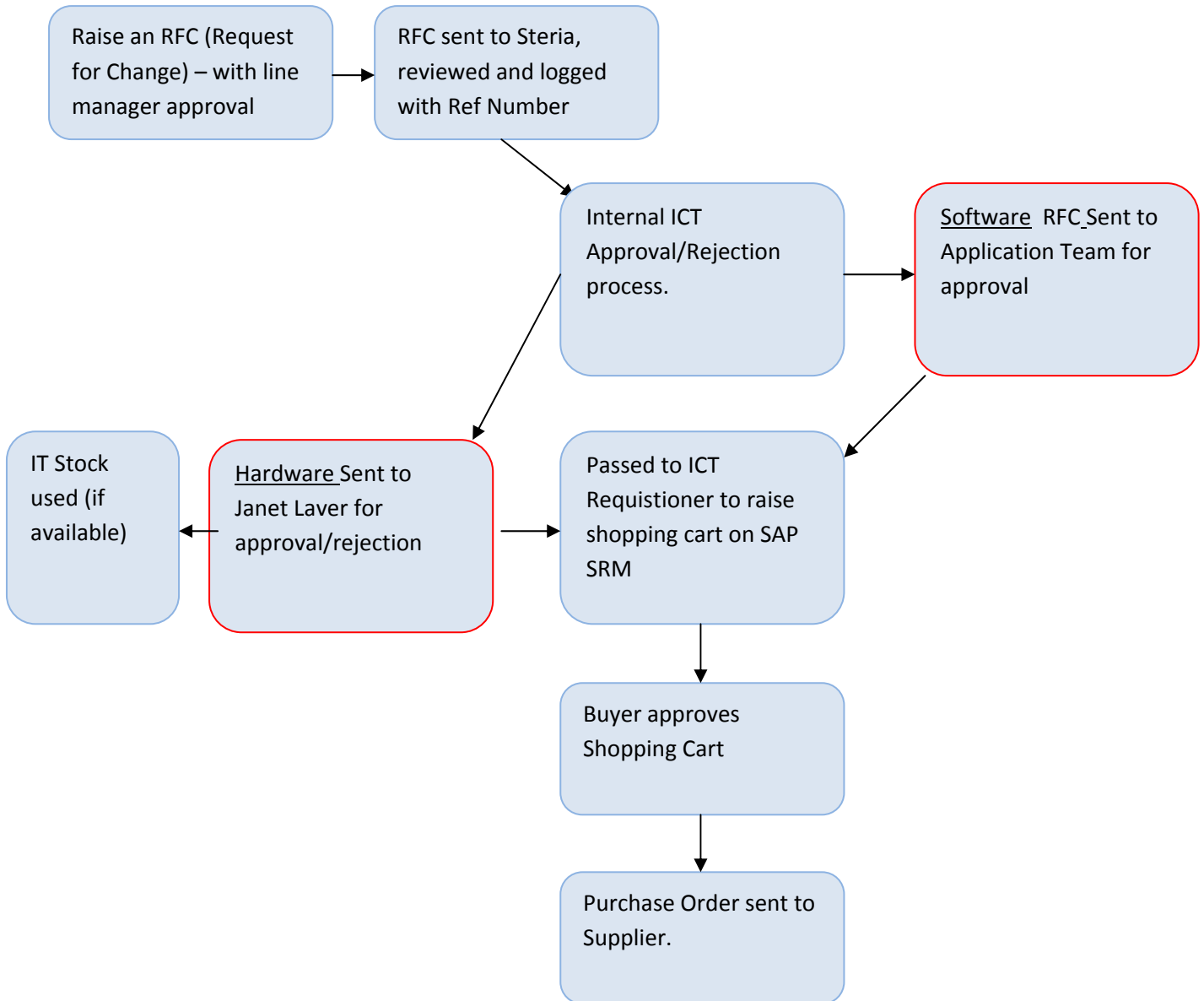


Contact Details

If you have any queries related to the recruitment of temporary staff please contact

By E-Mail nickygriffiths@wiltshire.gov.uk By Telephone 01225 7716

Purchasing ICT



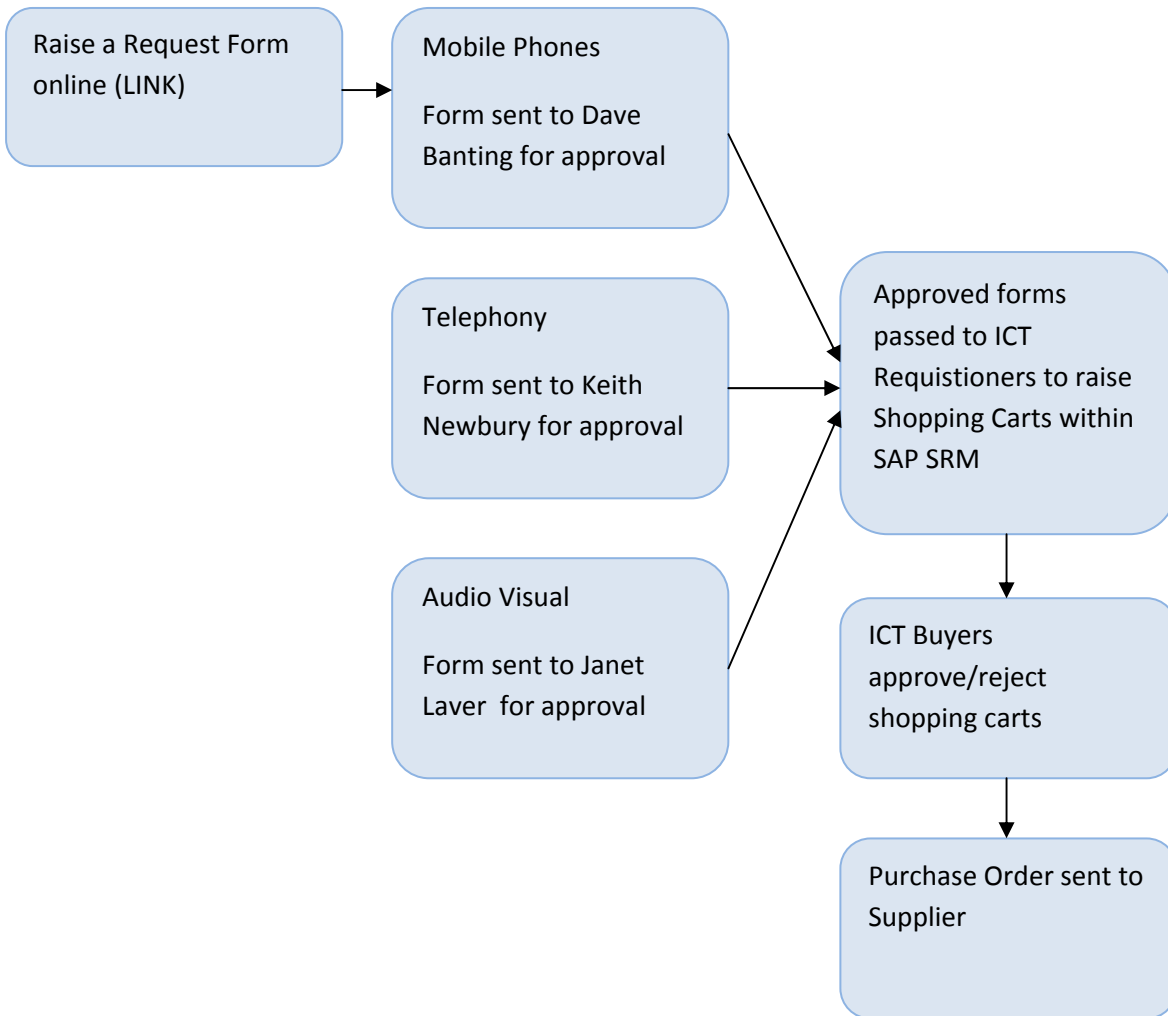
Above is the process for ordering all Information, Technology and Communications equipment, services and software.

The above includes, computers, laptops, peripherals such as scanners, digital cameras, USB drives etc. Please note there is a separate process for Audio Visual Equipment (including projectors) and Telephony (Land Lines, equipment and Mobile phones).

Point of Contact: Janet Laver

Please note for software not covered by Steria, please contact Janet Laver, Operations Team

Purchasing Telephony and Audio Visual Equipment



Mobile Phones – Point of Contact Dave Banting

Telephony – Point of Contact Keith Newbury

Audio Visual – Point of Contact Janet Laver

Audio Visual equipment includes, Televisions, VHS Players/Recorders, DVD Players/Recorders, Projectors etc

Purchasing Building Construction & Maintenance

All Building Maintenance purchasing must be routed to Phil Durston prior to raising a shopping cart. 01225 713221

All construction purchasing (including the use of architects etc) must be routed to Neil Ward 01225 713228

Ten Killer Questions

1. What purchasing system do I need to use?

Answer : SAP SRM (Supplier Relationship Management) unless:

- 1) *You are ordering from a specialist Line of Business application that will continue to operate from 1st April, such as Exor, GVA, Routewise, Simdell and Galaxy or*
- 2) *you are ordering goods or services for which the SRM Purchase Order route is unsuitable. This could be because the order cost is unknown because cost is driven by usage, such as utilities.*

Advice on the suitability of methods can be obtained from the Corporate Procurement Unit (CPU) and the relevant Category Manager.

2. Who is the Requisitioner for my service area/department?

Answer : Each service area/directorate should have a number of staff set up as Requisitioners. Speak to your change manager for details.

3. I cannot find the right product category?

Answer : There are 22,000 plus Standard Product Categories codes in total; they are arranged hierarchically in four levels i.e. each level will open out to give more detailed sub categories. We have chosen to use around 500 of the most commonly used product categories.

It may be that the product category that you are looking for is one that sits below one of the categories we use. You need to speak to the relevant Category Manager for clarification. In most cases please use the category that closely fits to what you are purchasing.

4. My Supplier isn't on SAP SRM, Can I use them?

Answer : If your supplier was not deemed to be an assigned supplier by the relevant Category Manager, it may be because you are now required to purchase from those suppliers for that product category.

If you believe that these suppliers are not able to supply the items you want you will need to raise a free text requisition against your supplier and get it approved by your approving manager. It will then go to a buyer who will contact their Category Manager who will determine if your request is reasonable.

If the answer is yes the buyer will then need to obtain the necessary details to set your supplier up as a new vendor and then process your requisition. If the answer is no, your shopping cart will be rejected with an explanation why i.e. there is a preferred supplier that already supplies these products.

If you propose as a source of supply a vendor that exists in SRM but is not an assigned vendor for that product category this will also be routed to the relevant Purchasing Group/Buyers for action.

NB This will especially be true where we have a corporate contract covering the goods or services you require. Only where there is a specific business need to go a specialist supplier will this be allowed. Price or custom and practice do not constitute valid reasons.

5. How do I add a supplier to the list?

Answer: If you require a new supplier to be set up because, for example, you have tendered for a service and a new supplier was successful, or have sourced goods or services that are not within an existing contract you need to contact the relevant Category Manager to request this. You will need to complete the e-form (on the intranet) and send it to the Category Manager for approval. This will then be set up by the Master Data Team

If you are requesting that a supplier is added because it is one that you normally use, see the answer to question 4 above.

6. My Cost centre isn't there?

Answer : Cost Centres for Directorates were determined by Directorate Finance staff. Please refer your query to them.

7. Where does my shopping cart go after I finish shopping?

Answer : It goes to your Approving Manager. If he/she approves and you have requisitioned from a catalogue or a preferred supplier and that product category is not automatically routed to buyers (such as Adult Social Care) the purchase order will then be e-mailed to the supplier (if we have an e-mail address) or printed for posting/faxing.

If you have raised a requisition for a supplier that has not been identified as a preferred supplier for that product category, after your approving manager has approved it, it will go to the sourcing cockpit in the relevant Purchasing Group for buyers to complete (see also the answer to question 4 above).

8. My approver is on holiday (or sick leave etc), how do I get my shopping cart approved?

Answer : Your approver should have set up substitutes to cover this. If you see that your shopping cart has stalled with your approving manager and hasn't been actioned, you need to contact the SRM System Administrator in the SST who will change the workflow route to correct this.

9. Can I use a supplier that does not have a category or contract on SAP SRM?

Answer : All suppliers in SRM have categories attached. If a supplier is set up as a preferred supplier (on a vendor list) you can order from them even if we don't have a contract with them.

10. I don't know where to buy from?

Answer : If you are a Requisitioner you should buy from the preferred suppliers listed against the product category you are attempting to requisition against. If it's a more general query please speak to the relevant Category Manager.

: [Insert Link to FAQs](#)

Definitions of Roles

A great deal of work has been completed to ensure that previously used vendors have been selected and categorised prior to April. In most cases the categories have been cleansed by the Interim Category Managers and each category has been built with a good number of useful known suppliers.

However because of the lack of quality purchasing information, we can expect the Categories to build themselves further when the purchasing activity begins from April 1st.

To facilitate this transitional period of building quality purchasing management information, there are two interim roles that will in time develop into permanent functions. They include:

Interim Buyer

In the months after go live the Interim Buyers will provide support to the Interim Category Manager in ensuring that vendors are categorised quickly and efficiently and added to SAP SRM.

Interim Category Manager

The Interim Category Managers will develop and build the purchasing policies and work with the Interim Buyers as part of dedicated Buying Teams to ensure a fine balance of efficient purchasing within a managed environment. They will continue to build and refine their category vendor base.

The Main SAP SRM Roles

Requisitioners

Requisitioners will have access to the shopping cart facility of SAP SRM and will purchase for their department or service area

Approving Manager

Approving Managers are responsible for approving or rejecting shopping carts for their work area that have been forwarded by the approval workflow within SAP SRM.

Professional Buyer

Employees who are responsible for completing incomplete shopping carts and sourcing new products not previously purchased and working with Category Managers on managing quality vendor base within their categories. Professional Buyers will understand the category marketplaces within which they operate.

Category Manager In SRM

Managers who are responsible for contract terms and conditions for product categories linked to specific purchasing groups.

Category Managers approves requests to set up new vendors against their categories, manages buyers work lists, approves changes to Purchase Order lines by Buyers to unblock invoices. Reports to Service Directors/CPU on spend by Product Categories

Methods of Payments to Suppliers

SRM = Purchase order via Supplier Relationship Management – includes Order, confirmation and invoice matching

AP – direct key to AP from payment document – manually created and authorised

1. Traditional SRM – sub-divided by free-text or catalogue or punch out
2. SRM limit orders
3. SRM with ERS
4. AP – one-time vendor
5. AP invoice plan
6. AP standing vendor
7. Excel upload into AP
8. Purchasing cards
9. Interfaces from LOBs
10. Imprest accounts
11. CHAPS – emergency only