University of California Observatories & Procurement Services

CruzBuy Requisition Best Practice Training

July 2013
Team 1 - Your Buyers

http://financial.ucsc.edu/Pages/Purchasing_Contacts_Team1.aspx

- Team 1 contacts and dollar delegations:
  - Kathleen Rogers – Buyer III
    - >$50k
  - Nancy Nieblas – Buyer III
    - >$50k
    - >$50k
  - Donna Gorman – Buyer II
    - $10k - $50k
  - Yamindira KanagaSundaram – Buyer I
    - $1 - $10k
Buyers as Your Resource

• Importance of Communication
  • Contact us early on complex orders or if you are not sure how to proceed.
    – Streamline process steps based on transaction
  • Keep us in the loop or updated

• Who to contact when
  – CB Technical questions to: Wendy Wells, Help Desk
    buy4me@ucsc.edu or 459-2311
  – CB Processing/Contracting: Team Buyers

• Procurement web page – bookmark it!
  https://financial.ucsc.edu/Pages/Purchasing_main.aspx

• Basic Procurement Guidelines and Reminders
  http://purchasing.ucsc.edu/howto/BasicProcurementGuidelines.pdf
Requisition Processing - Setting Expectations

- History of CB and the experience of your team buyers
- A buyer cannot begin work without a CB requisition
- Lack of information and required documents will slow down your requisitions
- Plan ahead as much as possible, don’t wait till the last minute
CruzBuy
Expediting Your Requisition

• If it is a new vendor, Payee Setup Form (204)
  – Best option is to provide supplier contact for Procurement to obtain 204.
    – OR
  – If you have received the 204, send directly to Procurement or communicate about status. Don’t attach to requisition or email to buyer—not secure.

• Services – use the CB Services form
  – Independent Contractor Pre-hire Worksheet – BUS-77
    http://purchasing.ucsc.edu/forms/prehirewksht.doc
  – Scope of Work
  – Statement of Work or Proposal in response to our Scope of Work

• Tangible items - use the CB Non-catalog goods form
  – Quote/Proposal/Estimate
CruzBuy
Expediting Your Requisition

• Blanket Orders – use the CB blanket order form
  – Same as above depending on commodity
  – See CB blanket form for basic guidelines on use – or-
    http://purchasing.ucsc.edu/News/BlanketOrderGuidelines.html

• Change Orders
  – Provide detailed information about the change requested
    • What line is changing?
    • How much money are we adding or removing?
    • Are we extending the term of the agreement?
    • Has the scope changed? If so, attach revised scope etc.
    • Are we increasing QTY or replacing items?

• Elements of product description:
  – What - is being purchased
  – Where - service to be performed
  – When – term of service or delivery
Procurement Complexities

- Federal Funds being used to procure $>3,000
  - Fed Fund Requirement – Buyer’s Checklist
    - Source Selection, Price Analysis, Compliance with other Federal Provisions
- Bid Threshold - $100,000 – BUS-43
  - Bid Event (RFx or Reverse Auction)
  - Sole Source (http://purchasing.ucsc.edu/forms/UCSCSoleSourceform060613.pdf)
- Certificate of Insurance – Requirements triggered as determined by Risk Services/BUS 63
- Inventorial Equipment Account Codes and location information
  - $>5,000 > triggers inventory tracking (007010, 007020)
  - Adding value to existing asset (007000, 007050)
- Supplier terms and conditions
  - Triggers review by Business Contracts and can lead to modifications or addendums that need negotiating with supplier
Letting CruzBuy work for you

- Catalogs, Punch-outs
- Workflow
- Comments
- Record storage
- UCSC42
- CB Contracts
- UCOP Strategically Sourced Agreements (meets BUS 43 bidding requirements)

http://www.ucop.edu/purchserv/access.php
Questions Comments Answers