



**University of California Observatories &
Procurement Services**

**CruzBuy Requisition Best Practice Training
July 2013**

Team 1 - Your Buyers

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

- **Team 1 contacts and dollar delegations:**
 - **Kathleen Rogers – Buyer III**
 - >\$50k
 - **Nancy Nieblas – Buyer III**
 - >\$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**



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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

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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 \geq \$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**
 - **\geq \$ 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