Purchasing Connections

A bi-monthly publication providing the latest information, best practices, and resources for purchasing, strategic sourcing, PALCard, contract services, and equipment management. Select headers to view respective portal page for more information.

Simplify Work

Use one of the following purchasing methods to expedite workflow!

- UCIBuy
- PALCard

Purchasing News

Save the Date!

Purchasing and Risk Services is hosting a Supplier Showcase on Tuesday, October 27th from 11:00am – 1:30pm.

Stay tuned for more information!

SUPPLIER SHOWCASE

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Requisition Best Practices

Keep the following guidelines in mind when completing a Requisition:

- **Explanation Field:** Include a clear, concise message of what you want to convey to the Contract Manager, e.g. "Quote and Sole Source Justification attached," or "This is a Recurring Payment Purchase Order."
  - ➢ For Recurring Payment Requisitions, include the previous purchase order number in this field, if applicable. This helps the Contract Manager communicate appropriate information to the supplier.
- **Notes and Attachments:** *Always* attach backup documentation to the Requisition, such as quotes and justifications—**this includes renewal of recurring payment requisitions.**

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Tax Charges on Purchase Order

The PO copy that is sent to the supplier **does not** reflect tax, and only displays the subtotal. The following statement is transmitted on every PO: "Shipping, Handling, and Tax charges are calculated and charged by each supplier." If a supplier questions this, kindly refer to the above statement.

Fisher First Roll-Out

On Tuesday, June 23rd, Fisher First hosted a kick-off event showcasing 200,000+ items from their hosted and punchout catalogs.

Fisher First is the flagship distributor for Life and Science chemicals, consumable, equipment and laboratory supplies.

200+ attendees

In case you missed the event, select the following links for additional information:

- Fisher First Program Overview PPT
- Program Highlights

Strategic Sourcing

New Local Agreement

Strategic Sourcing is pleased to announce a new local agreement with Digital Networks Group, Inc. as of June 12, 2015. This company offers a wide variety of audio visual products, maintenance programs and design services for IT-related projects. Local agreements offer the best value through negotiated pricing, and terms and conditions on strategically sourced agreements. We have experienced years of

great service and products from this company, and look forward to many more to come.
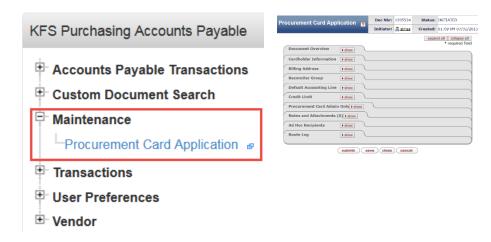
To obtain a quote or place an order, contact Bart Moran 949.428.6350; bmoran@digitalnetworksgroup.com.

PALCard

PALCard Application (PCAP)

As a reminder, the PALCard Application is available in KFS. With the launch of KFS, users can complete the PALCard Application online: ZotPortal > KFS > KFS Purchasing Accounts Payable > Maintenance > Procurement Card Application.

Visit www.palcard.uci.edu for information on obtaining a PALCard.

After the applicant completes the application, the document is routed to their Fiscal Officer/Supervisor. Instructions for this process are located at www.palcard.uci.edu or select link.

Note: Please discard old PALCard Applications, e.g. PDF version on desktop, or hard copies.

Gift Card Purchases

Gifts or gift-related items for employees, non-employees or students, for any occasion, e.g. retirement, bereavement, employee recognition, etc. **must be purchased on a Corporate Travel VISA or personal credit card**. Reimbursements are processed through a [Disbursement Voucher](#) (DV).

Gifts or gift-related items are not permissible on the PALCard. Please reach out to [PALCard@uci.edu](#) for additional questions. The [Purchasing Methods Guide](#) is available for buyers to help determine appropriate purchasing methods.

Contract Services

Updated Service Agreement

The Service Agreement has been updated to include helpful instructions when filling out the form. Please discard all saved copies from your computer, and access the updated form from [ZotPortal > Finances > Buying > Contracts/Agreements – Business > More Info > Forms > Service Agreement](#).

Photography Master Service Agreement

Contract Services is in the process of creating a Photography Master Service Agreement. Select the following link to be notified when the agreement is available: [sign up](#).

Equipment Management

Asset Inventory Certification Document (AICD)

On July 23rd, Asset Representatives received the AICD document in their KFS Action List. A copy of the email that was sent to Asset Representatives, Department Heads, and Fiscal Officers explaining the new process is attached to the newsletter.

Equipment Management will host two open lab sessions. Both labs are located at OIT AIRB 1020 and are posted in the [UC Learning Center](#); however, registration is **NOT** required. Drop in any time during the 1 ½ hour window.

- Monday, August 17th from 2 – 3:30pm

- Wednesday, September 9th from 9 – 10:30am

Capital Asset Object Codes

Using the correct object code for Capital Asset Requisitions is critical to ensure correct routing and approvals. There are only 10 Capital Asset object codes used for Capital Asset Requisitions. Select the following link for a complete list: Capital Asset Object Codes. It's recommended to bookmark the link for future access.

Training

Coming Soon—KFS Purchasing Best Practice Workshops

Starting in September, we will offer KFS Best Practice workshops for Requisitioners and Departmental Buyers. Select the following link to share your best practice(s) in completing Requisitions or Purchase Orders, or ask a question: feedback.

If you would like to set up in-person training (one-on-one, small group, or department), contact Shaina Sims (simss@uci.edu; 949.824.5390) to schedule a time.

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Provide Feedback

Resources
- Buying Portal
- Purchasing Portal
- Past Newsletters

Training Information
- Purchasing & Capital Asset Training Calendar
- KFS Purchasing Training Guides
- CAM Training Guides