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

Policy Updates

Policy 707-11: Purchase Requisitions/Purchase Order Changes – Guidelines is being rescinded. This policy is no longer required as KFS Purchasing Training Guides detail the "How-To's." Please click the following link to access instructions: KFS Purchasing Training Guides.

Policy 707-10: Purchasing Procedures is being updated to reflect an addition to section L, Special Requirements. **Software or Software Service Purchases** has been added, and reads as follows:

All purchases for software or software services must use applicable commodity codes and be reviewed for compliance with IT Accessibility and Information Security & Privacy policies and guidelines. Requisitioners must answer ten questions in the **Software Purchase Questionnaire** tab of the KFS Requisition to determine IT Accessibility and Information Security risks associated with the purchase request.

Per our Purchasing Methods Guide, computer software or services are to be purchased through UCIBuy or on a KFS Requisition. **PALCards may be used only if preauthorization is received from the PALCard team.** To request authorization, email PALCard@uci.edu with the details of your purchase.

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Purchasing Protocol Document

The document outlines UCI's protocol of guidelines and best practices for the purchase of goods and services. The document does not replace existing policy training; instead, it serves to provide a summary of the following topics:

- Purchasing Authority
- Purchasing Methods and Intended Use
- Purchasing Dollar Range Guidelines
- Signing Vendor Agreement/Supplier Paperwork
- Termination of Agreements
- Deposits
- Construction Contracts vs. Purchase Orders
- Unauthorized Purchases
- After-the-fact Purchase Orders

Click the following link to access the [Purchasing Protocol Document](),and be sure to fill out the survey on the last page. Your input is greatly appreciated.

Recurring Payment Reminder

As a reminder, if your department has a Recurring Payment Purchase Order (RPO) expiring on 06/30/16 and it is not linked to a Contract/Agreement, submit a new requisition to continue services or delivery of goods.

All requisitions should be received before Monday, June 20th to ensure that RPO's will be processed in time for a July 1st start date.

Please refer to the Quick Reference Guide for detailed information on how to submit a Recurring Payment Purchase Order: [KFS QRG: Recurring Payment Requisition]().

Strategic Sourcing

New Local Agreement

GENEWIZ®
Solid science. Superior service.

Strategic Sourcing is pleased to announce a new local agreement with GENEWIZ, a global leader in R&D genomics services. Their mission is to provide superior data quality and technical support to assist researchers in making scientific discoveries.

Local agreements offer the best value through negotiated pricing as well as terms and conditions on strategically sourced agreements.

To obtain a quote or place an order, contact Ashley Morgan, 858.361.9201; Ashley.morgan@genewiz.com.

PALCard

PALCard Celebrates 20 Years

2016 marks the 20th anniversary of PALCard, UCI's purchasing card. PALCard began its humble beginnings back in 1995 as a pilot program and began rolling out to departments in 1996 with an annual spend of around $1 million. Purchasing cards were a fairly new concept back then; however, ease of use and that it substantially reduced costs to purchase and pay for goods, made this purchasing tool quite popular and adoption caught on quickly.

Heidi Worcester, Strategic Analytics, Small Business, and Sustainability Manager

"When I joined the Purchasing Department in 1999 to coordinate and later manage the program, annual PALCard spend was $7.5 million. Last year, annual spend grew to $40.2 million, 115,000 transactions, and 1,400 accounts. It is one of the most successful University of California purchasing card programs, and a highly respected purchasing card program in higher education. PALCard is now managed by Jennifer Chey and supported by two additional full-time staff." –Heidi Worcester

Cell Phone Purchases and Services

Employees who are planning to purchase University-paid mobile devices and rate plans, or those who need to make changes on an existing account, should directly contact the supplier representative.

The following link provides contact information for each provider: http://www.oit.uci.edu/telephone/mobile-phone-business-discounts/.

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UCIBUY

UCIBuy Enablement Request

UCIBuy™

Is there a Supplier you purchase from frequently, that you would like added to UCIBuy? If so, email purchasing@uci.edu with suggestions and relevant information.

We appreciate your ongoing support in helping UCI's eCommerce site continue to grow.

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Contract Services

New Team Member

We are pleased to announce that Alex Tiquia returned to the Business Contracts team on Monday, June 6th. We are excited to have Alex back with the UCI family.

To reach the contracts team, email contracts@uci.edu.

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Equipment Management

Procedure for Employee Changes

To change a CAM Processor (back up for Asset Representative) or Custodial Code Reviewer (Department Head), have the Department Security Administrator (DSA) update the roles in KSAMS.

To add or change the Asset Representative, have the DSA email Helen Chang (hmchang@uci.edu) and include the following.

- Employee Name, UCInetID, and Role Name
- Department Org Code(s)
- Department Inventory Custodial Code(s)
- Department Inventory Name(s)

Training

Save the Date!

The next Supplier Showcase is scheduled for Wednesday, March 29th, 2017.

Stay tuned for more information!

2015-16 Fiscal Year-End Close Dates

Select the following link to view 2015-16 Fiscal Year-End calendar dates and instructions that were announced on May 20, 2016: 2016-Fiscal-Close-Instructions.pdf

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purchasing@uci.edu
949.824.4040

Provide Feedback

Resources
- Buying Portal
- Purchasing Portal
- Past Newsletters

Training Information
- KFS Purchasing Training Guides
- CAM Training Guides