

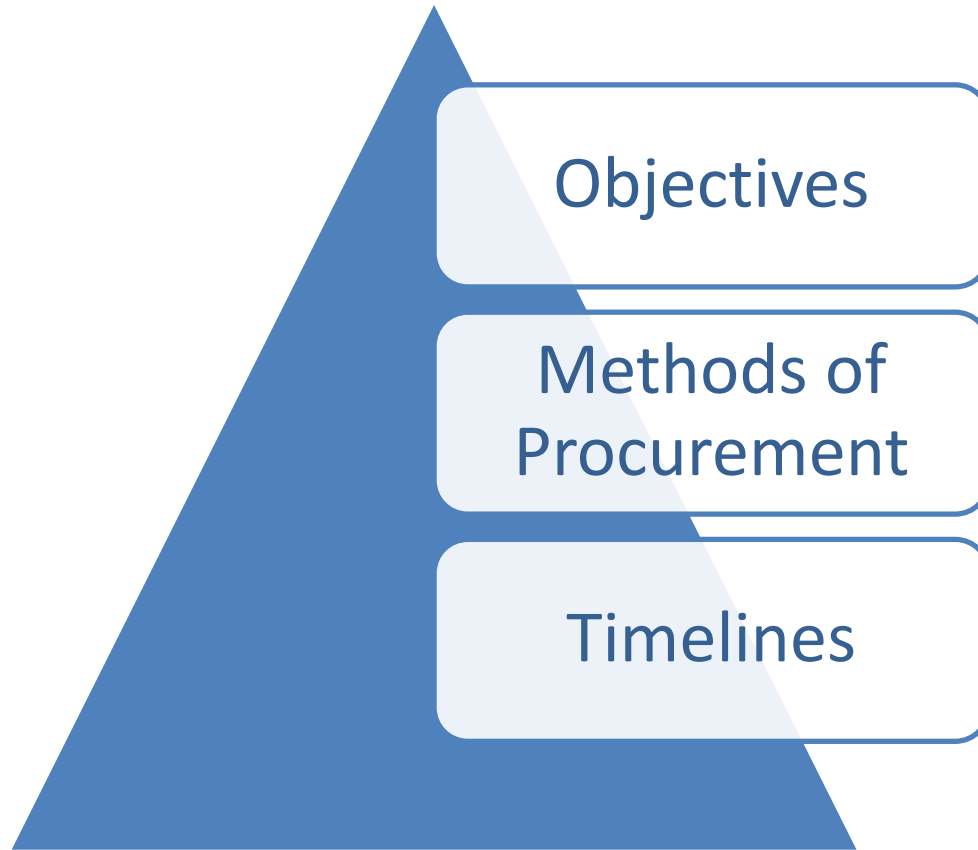


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KNOWLEDGE
SERVICES

The Business of Buying at UTA

Agenda





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Objectives

Objective of Procurement

To make procurements on behalf of the University using the **most appropriate and effective** method of acquisition in order to obtain the **maximum value for each dollar of expenditure.**

Purchases that exceed \$15,000 will be done on a competitive basis unless otherwise authorized by law, UT System policy or UT Arlington Policy.

Ensuring a Smooth Procurement

1. Get Procurement Services involved early in the sourcing process for purchases over \$15K.
 - Ensure the proper procurement method is used
 - Ensure compliance with all statutory and University/System policies and requirements
2. Any employee entering requisitions in UTShare is strongly advised go to Knowledge Services Requisition training.





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Methods of Procurement

Approved Purchasing Methods

MAV eSHOP

- On-line portal with direct access ordering from many commonly-used campus-wide contracts (Fisher Scientific, Staples, Dell, Grainger, etc...)

ProCard

- Purchases of \$4,000 and less
- Certain purchase categories are restricted

Primary Source

- One-time purchases of less than \$15,000
- No bidding required
- Utilize Historically Underutilized Businesses (HUBs) when possible

Informal Bids*

- \$15,000 up to \$50,000
- Can be informal quotes (not published to the public)

Competitive Sealed Bids*

- Over \$50,000
- Handled by Procurement (formal, published bid or RFP)

** Requires minimum of 3 bids/proposals – 2 must be certified Historically Underutilized Businesses (HUBs).*

Additional Purchasing Methods

Some Current Campus-Wide Blanket Orders (full list on Procurement website):

- Bus charter service
- Temporary employee services (WorkQuest/Goodwill Industries)
- Printing and Promotional Items (Prestige Business Solution)
- Office Supplies (Staples via Summus and Office Depot via Today's Business Solutions)
- Relocation Services (multiple vendors, refer to Procurement webpage)
Now considered taxable income as of January 1, 2018
- Express Shipping (eShipGlobal)
- Print Management (Copiers and Printers through Konica Minolta and Canon)
- Coffee Services and Supplies (multiple vendors, refer to Procurement webpage)

[Procurement Website](#)

State Contract / GPO Orders – DIR, TXMAS, E&I Cooperative, BuyBoard, etc...

- \$15K +: Requires a minimum of 3 bids/quotes **if** there are multiple suppliers in the specific category of goods or services being purchased. (Per UT System directive)
- GPO must be approved by the UT System (full list on Procurement website)

UT System Supply Chain Alliance Contracts

- No bidding required, already competitively sourced by UT System Supply Chain Alliance
- A list of contracts for use is available on the Procurement website, or for assistance contact your Buyer or a Contract Specialist.

Exclusive Acquisitions Justifications

A product or service that has a distinctive characteristic that is not shared by competing products or services, limiting consideration to one manufacturer/supplier.

- For purchases over \$15K where competition is not possible
- Requester must justify why this characteristic is necessary/of benefit to the University
- Exclusive Acquisition Justification Form must be submitted with the requisition (Form BF-PGS-F1)
 - Procurement reserves the right to reject the EAJ request and seek competition

Formerly Known As - Sole Source or Proprietary Purchases

Emergency Purchases

Unforeseen circumstances requiring an immediate response.

Purchase to prevent a hazard to life, health, safety, welfare, property, or to avoid undue additional cost to the state.

Contact your Buyer.

- Before if there is time
- After for purchase order creation directions

Requires an Exclusive Acquisition Justification Form with the requisition (Form BF-PGS-F1).

Service-Related Purchase Orders

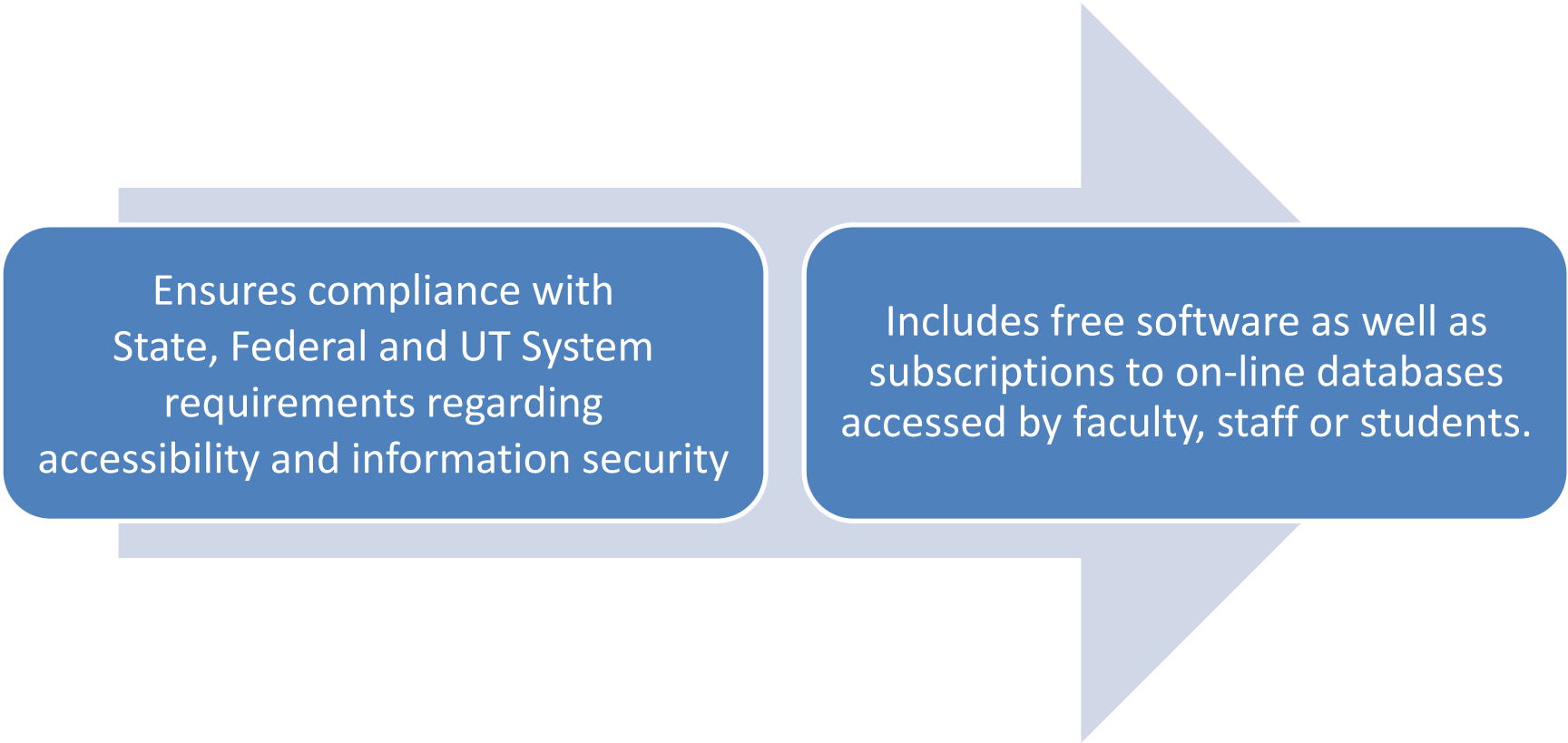
On-site service requirements that must be fulfilled prior to issuance of a purchase order over \$15K:

- Certificate of Insurance from Vendor
- Criminal Background Check Attestation on Vendor's Employees

The Procurement Department will secure these documents from vendor to ensure compliance with UT System policies.

Software, Applications, and Subscriptions

In order for procurement request to be processed, requisition must include approval from the Office of Information Technology (OIT) and the Information Security Office (ISO).



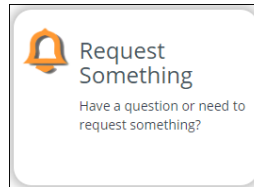
Ensures compliance with State, Federal and UT System requirements regarding accessibility and information security

Includes free software as well as subscriptions to on-line databases accessed by faculty, staff or students.

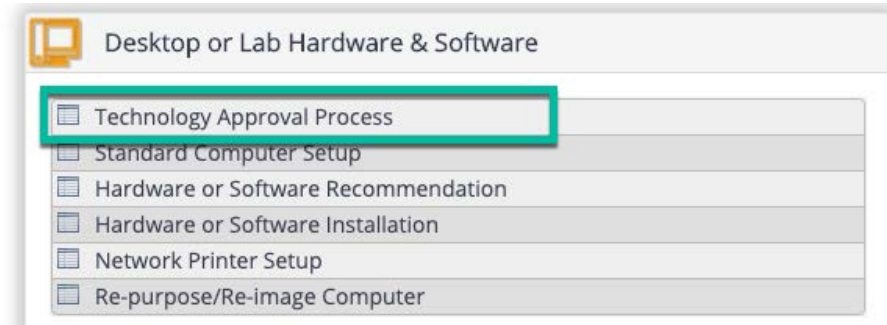
Software, Applications, and On-Line Subscriptions

Submit request through Service Now: <https://go.uta.edu/taprq>

Select “*Request Something*”
then log into Service Now.



Scroll to the bottom of the Service Catalog page
and, under “*Desktop or Lab Hardware & Software*”
select “*Technology Approval Request*”.



Complete the form. You will receive a Service Now
Request number that you can use to track your
request.

Technology Approval Process

EIR - Electronic and Information Resources (including software or on-line resources)

Instructions: The information gathered in this request is designed to provide the critical information needed to initiate the reviews for accessibility, security, and use to support the UTA mission. Accuracy and details provided can help to speed up the review process. For this questionnaire, the term technology is used to reference a *technology* solution such as an application, product, resource or service.

A reference guide on how to complete the submission form is at Knowledge Article KB0011222. The guide includes a list of questions so you can collect the information prior to starting the request form. A list of approved software (exempt from this process) is available at Knowledge Article KB0011177.

The purposes of the reviews are to:

- Ensure accessibility
- Ensure security
- Ensure safe use
- Ensure alignment with infrastructure
- Ensure fiscal value

Campus Contact Information

*1. Requested For

2. Department

3. Contact Phone Number

*4. Contact Person (i.e. Faculty Member) to answer questions about this request

*5. What is the name of the technology requested?

*6. Please provide specifics about the technology requested ?

Checklist of items to include:

- Technology Manufacturer
- Technology Details (version, platform, media)
- Website links for information

7. If the technology has been previously reviewed on a ServiceNow Request, please provide the ServiceNow Request number from that review. If the number is not available, but answer is yes, please write-in yes - don't know SN number.

Business Justification



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Procurement Timelines

Purchases Less Than \$15,000

No
competitive
bid required.
Utilize HUBs
when
possible.

Dependent
upon “other
factors”

Allow five
working
days to be
processed by
Procurement

Purchases between \$15,000 and \$49,999

A
competitive
informal
bid process
required

Dependent
upon
“other
factors”

Allow 15
working
days for
processing

Purchases between \$50,000 and \$99,999

A formal published bid process required

Bids must be posted for a minimum of 10 working days

“Other factors” generally become more prevalent and likely

Allow 20 - 30 working days for processing

Purchases \$100,000+

A formal published bid process required

Must be posted on the State's Electronic Business Daily website for a minimum of 10 working days

A HUB Subcontracting Plan (HSP) is required

Must be approved prior to reviewing bids or awarding PO/contract

"Other factors" generally become more prevalent and likely

Allow 30 working days for processing

Timing Factors to Consider



Workload / Time of Year

Lack of clarity in product or service scope / requirements

Vendor documents requiring review and execution by Legal Affairs

Exceptions (e.g. PO's after-the-fact)

Office of Information Technology (OIT) or Information Security Office (ISO) review and approval

Budget issues / errors in UTShare

Any other process or form requiring approvals

Request For Proposals (RFP)

Used to solicit proposals/proposed solutions for larger, more complex systems or services.

More complex scope and requirements development.

Considers price as well as other factors, as evaluated and scored by an evaluation team.

Generally involves multiple rounds of written clarifications, in-person interviews/tech demos, and possibly a request for “best and final offers” (BAFOs).

Allow 3-6 months for processing depending on the complexity of the project.



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Factors that Influence Procurement Timeline

Exclusive Acquisition Justification

Did you use the most recent version of the EAJ from (BF-PGS-F1)?

Did the requesters and approvers complete University Compliance Services' Outside Activity Portal (if required)?

Did you provide complete and accurate information for Procurement to evaluate the request?

Allow 5 days for the EAJ to be reviewed/processed by Procurement. ***There is no guarantee it will be approved.***

Using a Group Purchasing Contract (GPO) does not mean it is a sole source procurement. If there are multiple distributors/re-sellers under a GPO, Procurement must still seek competitive quotes per UTSystem requirements.

Execution/Signature of Documents

If the vendor requires UTA to execute signatures on vendor provided documents, review by **Procurement and Legal Affairs** (if needed) will be required prior to signature.



Expect this to add a minimum of **15-20 days** to the procurement process, assuming no “red flag” issues requiring further legal negotiations

UTShare Issues

Budget Check Errors

Error: Exceeds Budget Tolerance / Spending Authority Over Budget

- What it means: cost center has no budget or there are insufficient funds
- Use a cost center that has available funds
- Modify the amount or quantity ordered
- Process a Budget Transfer form

Error: No Budget Exists / Budget is Closed

- What it means: cost center has no budget or cost center is inactive
- Use a cost center that has available funds
- Process a Budget Transfer form Chart field string error

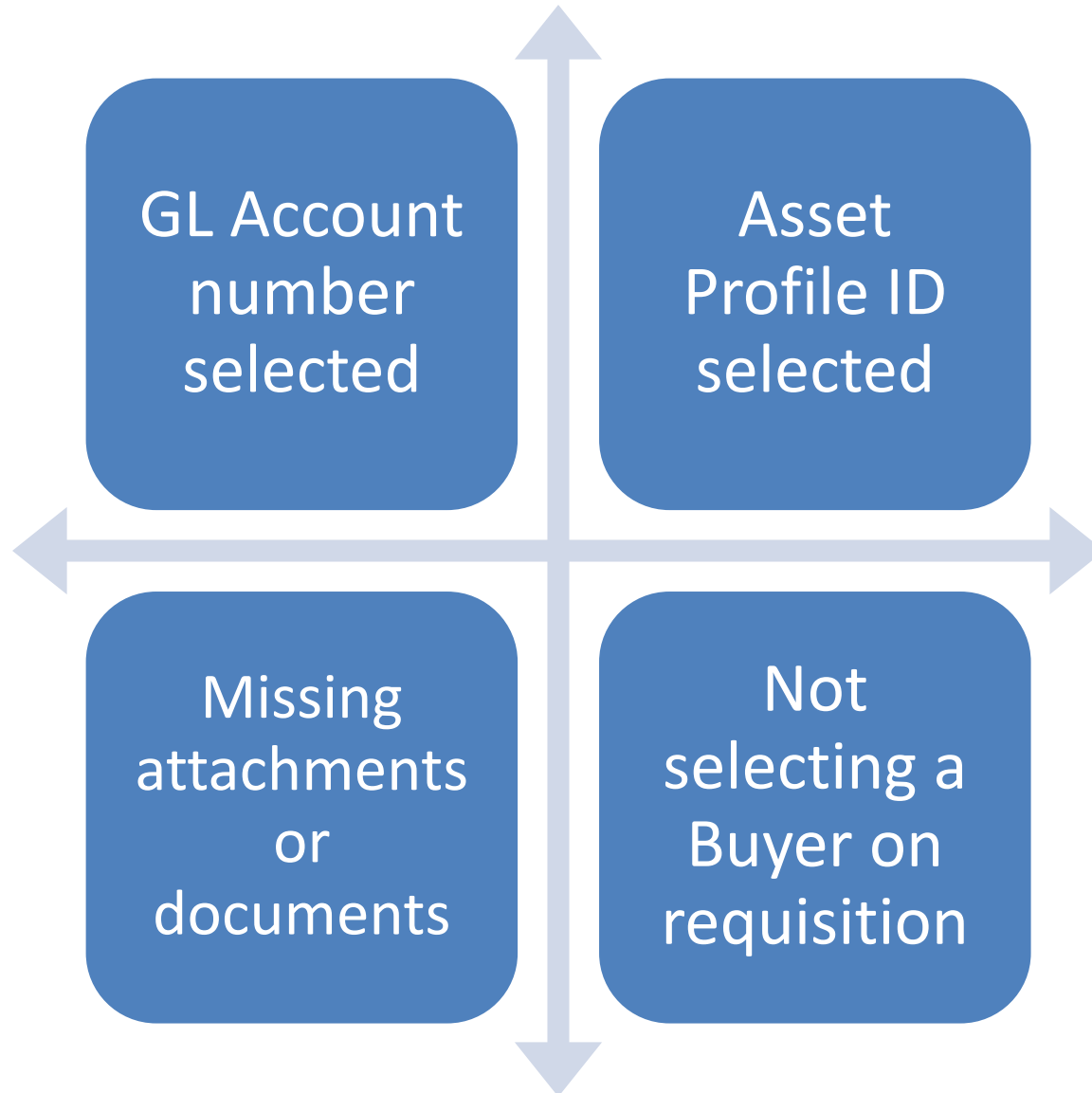
Error: Budget Date out of Bounds

- What it means: You are trying to process a transaction past the dates for the project
- Use another funding source
- Extend the dates for the Project

Error: Required key CF is blank

- What it means: Missing a ChartField value, such as Fund, Function, Dept, Cost Center, etc.
- Go to ChartField section of the transaction and enter the missing ChartField value
- Use a valid budget period

Other UTShare Issues



Relevant Rules & Regulations

BF-PGS-PO1

- Best Value Procurement Policy

BF-PGS-PR1

- Best Value Purchasing Procedures

BF-PGS-PR2

- Departmental Contract Administration

BF-PGS-PR3

- Transactions with Employees

BF-PGS-PR4

- Tax

BF-PGS-PR5

- Bid Protest Procedures

BF-PGS-PR6

- Interagency Contracts

BF-PGS-PR7

- Damages and Shortages

BF-PGS-PR8

- Reimbursements and Payments Other than for Travel and Purchase Orders

BF-PGS-PR9

- Contract with Historically Underutilized Businesses (HUB)

BF-PGS-PR10

- Cell Phone Issuance Procedure

BF-PGS-PR11

- Vendor Setup and Maintenance

Additional Related Resources

Procurement and
Strategic Sourcing

- Joe White
- 817-272-6148
- josephsw@uta.edu

Disbursements
(Accounts Payable and Travel)

- Randall Piatkowski
- 817-272-0404
- randallp@uta.edu

ProCard

- Paul Anderson
- 817-272-6338
- paulfa@uta.edu

HUB Program Office

- Julia Cornwell
- 817-272-3002
- cornwell@uta.edu

Knowledge Services
(UTShare Training)

- 817-272-2155
- KnowledgeServices@uta.edu
- [Training & Development Website](#)