

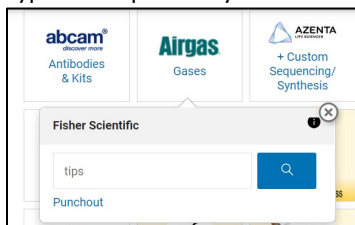
UCIBuy Purchasing Guidelines/Workflow

Important things to keep in mind:

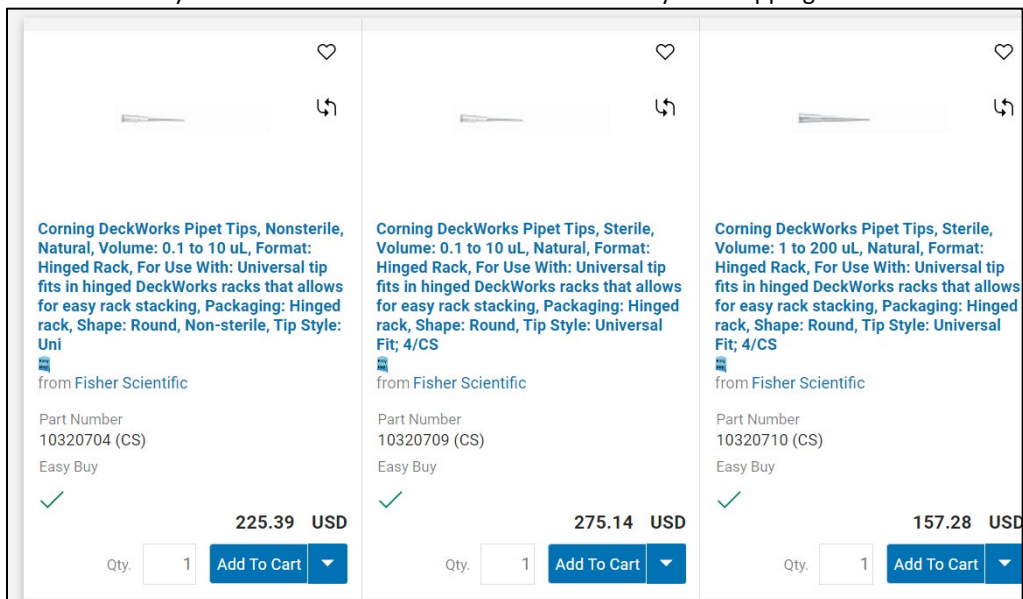
- All orders over \$5,000 must be approved by the PI prior to purchase via email attachment with their approval, FYI approval in KFS, or via signature using the [Purchase Request Form](#).
- [Purchasing Methods Guide](#)
- [UCIBuy Guide](#)

PROCESS (UCIBuy Purchase Order)

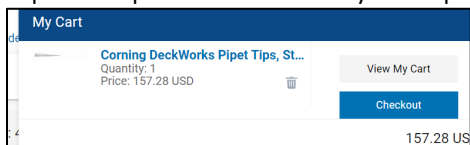
1. Go to the KFS/Finance page of the ZotPortal, KFS Purchasing tab, and click UCIBuy – Shop Catalog. This will take you into UCIBuy.
systems.oit.uci.edu/kfs/b2b.do?methodToCall=shopCatalogs&returnLocation=https://systems.oit.uci.edu/kfs/index.html
2. Scroll down to the widgets for the catalogs to order from and click on the vendor you want to purchase from.
3. Type in the product you are searching for and click magnifying glass:



4. Chose the item you want from the search results and add to your shopping cart:



5. Repeat this process for all items you are purchasing, then click Checkout:



6. You will be brought to the requisition page, where you will click Create KFS requisition:

Requisition • 185348854

Summary PO Preview Comments Attachments History

General

Cart Name 2024-04-11 MARGARRD 01

Description no value

Priority Normal

Prepared by Maggie Davis

Prepared for Maggie Davis

PO Clauses no clause

Billing

Billing Options

Account no value

Billing Date

Draft

Total (157.28 USD)

Shipping, Handling, and Tax charges are calculated and charged by each supplier. The values shown here are for estimation purposes, budget checking, and workflow approvals.

Subtotal 157.28

157.28

7. You will now be brought to your KFS requisition which will have the vendor and items ordered populated in. Save the document and then add your KFS account to the items and save the document, calculate and submit.
8. **WORKFLOW:** Please allow up to **two weeks** of submission for order to be processed.
- Lab will initiate UCIBuy Requisition and system automatically routes to MB&B Procurement Analyst for review.
 - Procurement Analyst will review & approve, then will route to Finance analyst to approve UCIBuy Requisition.
 - Procurement will receive UCIBuy Requisition to approve and process for PO number.
 - Purchase Order is created and transmitted to vendor for purchase.
 - Vendor processes order and sends order confirmation to MB&B Procurement Analyst.
 - MB&B Procurement Analyst forwards order confirmation to requestor.
 - Accounts Payable will receive invoice and process payment.

If you have any questions, please contact MB&B Department Procurement Analyst, Cecilia Arceo (carceo1@uci.edu).

Non-UCIBuy Purchasing Guidelines/Workflow

Important things to keep in mind:

- All Requisitions must be approved by the PI prior to the expense.
- [Purchasing Methods Guide](#)
- [Requisition Guide](#)
- [Purchase Order Guide](#)
- [Capital Asset Guide](#)

PROCESS (Non-UCIBuy Purchase Order)

1. Request an itemized quote from vendor and ask your PI to approve and confirm the KFS account number that will cover expenses.
2. Go to the KFS/Finance page of the ZotPortal, KFS Purchasing tab, and click Requisition. It will open up a blank requisition. Please complete KFS Requisition and attach itemized quote in Notes section. [Financials :: Requisition \(uci.edu\)](#)
3. **Document Overview:**
 - Description: Enter Vendor Name
 - Explanation: Enter business purpose/justification of items
4. **Delivery:**
 - Building Code: You can search your building number by clicking the magnifying glass. On the Building Code search page type your building name under Building name and hit search. EXAMPLE: *McGaugh* Click on the returned value and it will populate into your document.

BUILDING CODES

McGaugh Hall	9084
Biological Sciences III	9079
Natural Sciences 1	9090
Natural Sciences 2	9091
Steinhaus Hall	9075
Sprague Hall	9087
Gross Hall	9342

5. **Vendor:**
 - Suggested Vendor: Click magnifying glass. That opens up the Vendor lookup. Under Vendor Name type the Vendor's name and click enter – (EXAMPLE: *MWI* - Results will appear, click Return Value on the vendor you searched and it will populate. Save).
6. **Items:**
 - Add items to purchase. When adding your items, you will be required to enter the Commodity Code. To get your code, click the magnifying glass next to Commodity Code. To search, enter what you are purchasing in the Commodity Description box. EXAMPLE: *antibodies* Click on the returned value that works best to describe what you are purchasing. If you know your commodity code, no need to search, just enter it.
 - Once you have the line item filled in, hit the green plus sign and it will add the item to the document.
7. Once you have added your line items, click the **Setup Distribution** button. This will give you a blank line to enter your KFS account and your object code. To search the object code, click the magnifying glass. Type what you are purchasing and hit search. EXAMPLE: *lab supplies* Click return value on response to your search that fits best.

Commodity Code Examples:

ITEM	COMMODITY CODE	OBJECT CODE
Antibodies	12352203	8027
Biochemicals	12352200	8027
Computer Equipment and Accessories	43210000	see below
Controlled substance	51211900	8027
Gases	12140000	8100
Desktop Computer	43211507	see below
Shredding	80161508	7266
Lab supplies	41121800	8090
Lab Equip Maintenance	81101706	7100
Lab Equip	41100000	see below
Lab Equip - non inventory	41100000	8085
Office Supplies	44120000	8150
Toner	44103103	8150
Freight	78121603	4200
CAPITAL EQUIPMENT(NOT COMP&FURN) greater than \$5,000		9000
COMPUTER EQUIPMENT greater than \$5,000		9900
COMPUTER EQUIPMENT NON-SOFTWARE less than \$5000		8035

8. **WORKFLOW:** Please allow up to **four weeks** of submission for order to be processed.
- Lab will initiate Requisition and system automatically routes to MB&B Procurement Analyst for review/Approve.
 - Will then route to Finance Analyst to review and approve Requisition.
 - Procurement will receive Requisition and reviews, approves, and issues PO number for purchase.
 - Purchase Order is created and transmitted to vendor for purchase.
 - Vendor processes order and sends order confirmation to MB&B Procurement Analyst.
 - MB&B Procurement Analyst forwards order confirmation to requestor.
 - Accounts Payable will receive invoice and process payment.

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