

PURCHASING SERVICES

PROGRAMS & PROCESSES

May 2008

PURCHASING SERVICES/FINANCIAL SERVICES

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PURCHASING SERVICES DIRECTORY

Customer Service , Judith Mate-Stenberg	474-8348	410 Administration Bldg
Manager , Paul Dugal, C.P.P	474-9907	414 Administration Bldg
Assistant Manager , Ellowyn Nadeau, P. Eng	474-7987	414 Administration Bldg
Senior Purchasing Consultant, Contracts April Wozny	474-8720	414 Administration Bldg
Senior Purchasing Consultant, Research Jurgens Bekker, M.Sc., B.Sc. (Hons)	789-3348	P001 Pathology Bldg.

PURCHASING TEAMS

Office Products, Bookstore/Computers on Campus, Personal Computers:

Sr. Purchasing Consultant, Contracts, April Wozny	474-8720	414 Administration Bldg.
Assistant, Carmine Fiorillo	474-9284	414 Administration Bldg.

Computers, Office Equipment, Audio/Visual etc.:

Sr. Purchasing Consultant, Contracts, April Wozny	474-8720	414 Administration Bldg.
Consultant, Marj Lavallee	474-9875	414 Administration Bldg.

Systems Contracts, Purchasing Programs, Leasing etc.:

Consultant, Kristine Ward	474-7052	414 Administration Bldg.
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Services, ICAs, Conference, Books, Printing, Paper, Photography, etc.:

Sr. Purchasing Consultant, Contracts, April Wozny	474-8720	414 Administration Bldg.
Consultant, Bonnie Pilgrim	474-6113	414 Administration Bldg.
Assistant, Geri Smith	474-6624	414 Administration Bldg.

Aurora Finance

Customer Service, Kristine Ward	474-7052	414 Administration Bldg.
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Research, Furniture, Agriculture, Transportation, Customs, etc.:

Sr. Purchasing Consultant, Research, Jurgens Bekker	789-3348	P001 Pathology Bldg.
Consultant, John Fairman	474-9697	414 Administration Bldg.
Assistant, Mark Edel	474-9499	414 Administration Bldg.

Construction, Building Materials, etc.:

Consultant, Roxana Semchuk	474-9238	414 Administration Bldg.
Consultant, Bev Henry	474-8732	414 Administration Bldg.

Medical, Dental, Scientific, etc.:

Sr. Purchasing Consultant, Research, Jurgens Bekker	789-3348	P001 Pathology Bldg.
Sr. Consultant, Candy Frobisher	789-3347	P001 Pathology Bldg.
Assistant, Andrew Cramer	789-3993	P001 Pathology Bldg.
Consultant / Receiver, Jamie Smyth	789-3326	185 Brodie Centre
Shipping Assistant, Gerry Lieb or Barry Zimmerman	789-3961	185 Brodie Centre

PURCHASING FAX NUMBER LISTING

Fort Garry	474-7509
Bannatyne	789-3504
Bannatyne Shipping/Receiving	789-3946

http://www.umanitoba.ca/admin/financial_services/purch/index.shtml

PURCHASING TEAMS & COMMODITIES

Systems Contracts, Purchasing Programs, Leasing, Aurora Finance – Kristine

System Contracts	Preferred Agreements	Photo Copiers
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Computers on Campus, Office Products, Personal Computers – April, Carmine

Computers on Campus	Office Products	Personal Computers – Single Desktops, single laptops
Customer Service	A/V Equipment under \$5000.00	Electronics

Computer Lab Systems, Office Equipment, Audio/Visual, etc. – April, Marj

Audio/Visual	Communication Supplies	Electronics
Communication Equipment & Service	Computers Drafting Supplies	Office Equipment

Services, ICA's, Conferences, Books, Printing, Paper, Photography, etc. – April, Bonnie & Geri

Accommodations	Duplicating	Performing Arts
Advertising & Signs	Engraving	Photography Svcs & Spls
Art Supplies	Entertainment/Special Events	Plaques
Banquet & Meeting Rooms	Envelopes	Postage
Bookbinding	Fine Printing	Registrations
Books/Videos	Forms	Reprints
Catering	Mailers	Secondments
Conferences	Photocopying	Service Contracts
Copy Paper	ICA's	Study Subjects
Creative Design	Memberships & Subscriptions	Interviewees
Desktop Publishing	Musical Instruments	Translation

Research, Furniture, Agriculture, Transportation, Customs, etc. – Jurgens, John & Mark

Apparel	Farm Animals & Feed	Plants & Seeds
C.F.I. Purchases	Farm Equipment/Supplies	Sporting Goods
Courier Services	Furniture	Transportation
Customs	Packaging	Vehicles (Purchase, Lease & Rental)

Construction, Building Materials, etc. – Ellowyn, Roxana & Beverly

Automotive Parts	Decorating & Design	Maintenance
Automotive Repairs	Fuel	Safety
Building Materials	Heating/Cooling	Security
Construction	Household Appliances	Tools

Medical/Dental, Scientific, etc. – Jurgens, Candy, Jamie, Andrew

Culture Media	Industrial/Medical Gases	Pharmaceuticals
Dental Equip. & Supplies	Lab Animals and Feed	Radioisotopes
Dry Ice	Medical Equipment & Supplies	Scientific Equip. & Supplies
Health Sciences Centre	Northern travel	Surgical

Banntayne Shipping/Receiving – Gerry & Barrie

PURCHASING SERVICES - GUIDELINES FOR UNIVERSITY STAFF

The following guidelines will provide you with an overview of Purchasing Services' Programs and Processes. This booklet has been prepared to provide University staff with information to assist them in acquiring supplies, equipment and/or services through the assistance of Purchasing Services. Please contact a Purchasing Services Consultant (see attached Purchasing Services Directory) to discuss your particular needs; how we can best service you; and what role you can play in making our programs and processes most efficient and effective.

HOW CAN PURCHASING SERVICES HELP?

Purchasing Services staff are trained and experienced in the field of Purchasing Supply/Management. The Manager has the professional designation of Certified Professional Purchaser (C.P.P.), the Assistant Manager is a Professional Engineer, the Sr. Purchasing Consultant, Contracts has a C.P.P and a C.I.M. (Certificate in Management) and the Sr. Purchasing Consultant, Research has a Master of Science (Economics). Our consultants have many years of experience in best practices of purchasing in the public sector. In addition, a number of our staff are enrolled in Purchasing's Professional Development Program and participate in ongoing training programs throughout the year to upgrade their knowledge and skills.

The University centralizes its purchasing activity in order to take advantage of the specialization of Purchasing Supply/Management, collective purchasing power, and to provide a common area for the collection and disseminate of related experiences, market trends and other valuable Purchasing Supply/Management information. Our staff has been organized into commodity teams, in order to focus and further specialize in their individual areas of expertise.

Most importantly, our staff is committed to helping you accomplish your goals and objectives by assisting you in making 'Best Value' purchases as effectively as possible. Sustainability has become more and more prevalent in all Purchasing activities. Purchasing will aid you in determining the Best Value of your purchase that is in accordance with The Sustainable Development Act of Manitoba.

CUSTOMER SERVICE

For prompt, friendly and helpful service, please call our CUSTOMER SERVICE line at 474-8348 for all your Purchasing/Supply Management needs. We record all requisitions received so tracing the status of your request is usually very simple!

Our CUSTOMER SERVICE line is available to you from 8:30 a.m. to 4:30 p.m. including noon to 1:00 p.m.

This is your line! We welcome your inquiries, comments, and suggestions whether from Fort Garry, Bannatyne or any of our other many locations. Think of us as your 1-800 service at a 474 number.

Of course, you can also feel free to call any one of our staff directly
(See Purchasing Services Directory on page 2).

PURCHASING SERVICES **ITS ROLES, RESPONSIBILITIES AND SERVICES**

FINANCIAL SERVICES

Financial Services has been reorganized into six main departments, reporting to the Comptroller's Office:

PURCHASING SERVICES (which includes Purchasing, Transportation, and Customs);

REVENUE CAPITAL & GENERAL ACCOUNTING SERVICES (which includes General Accounting, Accounts Receivable, Asset Management and Cashiering);

BUDGET & GRANT ACCOUNTING SERVICES

PAYROLL SERVICES

TRAVEL SERVICES

SUPPLIER SERVICES (which includes the Purchasing Card)

HOW IS PURCHASING SERVICES ORGANIZED?

Purchasing Services is organized into commodity based Purchasing Teams (see attached Purchasing Teams & Commodities list) under the direction of two Senior Purchasing Consultants and the Assistant Manager, reporting to the Manager.

Two Senior Consultants handle the non-construction related purchases for both the Fort Garry campus and the Bannatyne campus. The Assistant Manager handles all construction-related purchases for both the Fort Garry and Bannatyne campus. This arrangement facilitates the specialization of product and service consultants to service you and your needs. A central Customer Service Line (474-8348) is available to service you, should you not know which team or staff member to call.

Our Management and staff are more than happy to arrange face-to-face meetings at your location as we recognize that in some cases, issues are more readily resolved in person.

WHAT IS THE MISSION OF PURCHASING SERVICES?

The mission of Purchasing Services is to provide value, quality and satisfaction in the delivery of an efficient and cost effective Purchasing/Supply Management service. We strive to accomplish our mission through the application, sharing and continuous upgrading of our specialized knowledge and skills; by upholding the highest level of professionalism and ethics; and through harmonious relationships of mutual trust, respect, support and understanding of each other, our University and business communities.

* Supply Management has been described as the management of obtaining goods and/or services from the supplier's suppliers to the customer's customers.

WHAT ROLE DOES PURCHASING SERVICES PLAY?

Purchasing Services' role is to assist University staff in acquiring goods & services they require to accomplish their goals and objectives, at the 'Best Overall Value'. Best Overall Value takes many factors such as economic, environmental, human health and social impacts in to consideration. So the "Lowest Price" does not always constitute the "Best Overall Value"

WHAT SERVICES DO WE PROVIDE?

Purchasing Services can provide you with...

- Developing and offering effective and low-cost programs for acquiring commonly ordered and/or low-dollar supplies and services (referred to as Systems Contracts, Preferred Suppliers, Purchasing Cards, etc).
- Acquiring products and/or services by experienced purchasing professionals at the lowest overall costs/best overall value, through centralized buying power, bidding processes and negotiations.
- Searching out sources of supply to service your needs and provide you with information on alternate products, services and sources of supply.
- Developing and maintaining reliable sources of supply and supplier relationships, to most effectively service your needs.
- Communicating information on market and pricing trends and conditions; alternative products and sources of supply; sale and procurement laws; taxes; customs and imports etc.
- Sharing information gained through other similar purchases and bringing together the wealth of expertise and information available on campus.
- Obtaining price and availability quotations for grant applications or estimation purposes.
- Arranging with suppliers to demonstrate and discuss their products and services with University staff.
- Providing fair and equitable purchasing programs in the administration of public funds.
- Communicating and/or negotiating with suppliers after purchases to ensure compliancy with Purchase Order Terms and Conditions and to help resolve and issues or concerns that you may have with the purchase.

THE PURCHASING PROCESS

AT WHAT STAGE OF THE ACQUISITION PROCESS SHOULD I INVOLVE PURCHASING SERVICES?

Purchasing Services can best help you with your purchase by getting involved as early as possible in the process. We can help you get estimates, arrange for suppliers to present their products, advise you of alternative products, offer information on similar applications at the University, and advise you on negotiation strategies for a 'Best Value' purchase. We can help you best by involving us in the development or the 'need' stage.

HOW DO I GO ABOUT REQUESTING GOODS OR SERVICES THAT I WISH TO PURCHASE?

First, you should ask yourself if this purchase can be made through one of Purchasing Services Programs, designed for commonly ordered goods or services such as:

- Systems Contracts
- Preferred Agreements
- Visa Purchasing Card (managed by Supplier Services)
- Standing Orders
- Petty Cash
- Bookstore Purchases of Supplies/Books
- Computers on Campus
- Direct Payment Form (through Supplier Services)

PURCHASING PROGRAMS

WHAT IS SYSTEMS CONTRACTING?

Systems Contracting is a purchasing program designed to simplify the acquisition process of relatively low-value/highly repetitive goods or services directly from pre-negotiated suppliers. You would simply place your orders directly with the designated supplier for the delivery of pre-negotiated goods or services which can normally be expected to arrive on the next business day. **Please note:** Systems Contract Requisitions for Printing Services, (other than walk-up copying at Fort Garry), are forwarded to Purchasing Services for prior logging. Each Systems Contract is treated as an extension of a centrally managed inventory on campus, and will provide you with very high service levels and consistently low prices, due to the long-term partnerships developed through these agreements. Systems Contracts are arranged for a variety of goods and services, ranging from office products to electrical supplies (Over 30 commodities in all). Systems Contracts cover general goods/services to a value of \$1,000.00 per unit/order (including applicable taxes).

Requisitioning instructions, pricing information and a current list of Systems Contracts are available by calling Kristine Ward @ 474-7052.

Systems Contracts Requisitions and the Systems Contract Supplier list are available on-line at http://www.umanitoba.ca/admin/financial_services/purch/index.shtml

WHAT DO I DO IF A SYSTEMS CONTRACT SUPPLIER IS OUT OF STOCK OF THE PRODUCT I NEED?

If the Systems Contract Supplier cannot provide the goods or services you require in sufficient time to suit your needs, you can either use a Purchasing Card (see below) or complete a Requisition to Purchase (see following section) to purchase the goods from an alternate supplier. If the item is less than \$200 you can purchase the item yourself and claim reimbursement through your department's Petty Cash pool (if available), or through the Travel Services Department, using a Petty Cash form (see below for details). In any of the above cases, be sure to note the circumstances of your request on the supporting documentation, in order to support our obligation to the Systems Contract suppliers.

PREFERRED AGREEMENTS

Preferred Agreements are similar to Systems Contracts and use the same procedures for placing orders directly with the designated suppliers (they are included on the attached Systems Contracts list). The main difference between the two is that we have an obligation to order our requirements through Systems Contract Agreements, whereas we are not obligated to purchase from a Preferred Supplier. If you wish an alternate supplier to the one designated through the Preferred Agreement, you may purchase from an alternate supplier, using your Purchasing Card (see above).

WHAT IF I HAVE REPETITIVE PURCHASE REQUIREMENTS FOR GOODS/SERVICES THAT ARE NOT AVAILABLE THROUGH THE EXISTING SYSTEMS CONTRACT OR PREFERRED SUPPLIERS?

YOU CAN USE...

THE PURCHASING CARD

Visa Purchasing Cards (US Bank Canada) are available to all administrative personnel of the University for the purchase of low-dollar goods and services not otherwise offered through Systems Contracts and like agreements. Purchase transactions with the Purchasing Card are limited to \$999.00 per supplier per day. Orders with the Purchasing Card can be placed directly with the supplier of your choice by telephone, fax, mail or in person.

The Purchasing Card can be used to purchase books, subscriptions, conference registrations, software, memberships, videos and hundreds of other business related expenses. The Purchasing Card Program is administered by Supplier Services.

Please contact Dianne Schilling, Supplier Services at 474-6090 for further information about the Visa Purchasing Card Program.

STANDING ORDERS

Purchasing Services will assist you in arranging for a Standing Order with a particular supplier. Standing Orders might outline the quantities of goods or services required over a specified period of time (normally the fiscal year), or might simply specify the anticipated spending for a range of products. In either case, Purchasing Services will assist you in negotiating with the supplier the 'Best Value' for you and your needs.

PETTY CASH

Departments may apply for a Petty Cash Pool from the Travel Services Department (contact Carole Johnson at 474-8492). Alternatively, staff may incur an expense personally (limit of \$200 per item) and seek reimbursement from the Travel Services Department using a Petty Cash Form, available on line at:

http://www.umanitoba.ca/admin/financial_services/purch/index.shtml

Exceptions to the \$200.00 limit may be requested from Purchasing Services in advance on a "case-by-case" basis. Please contact our Customer Service line @ 474-8348.

BOOKSTORE PURCHASES OF SUPPLIES/BOOKS

Supplies/Books may be purchased from the University Bookstore, by completing a Bookstore I.D. charge form available from the Bookstore at 474-8321 or 789-3601, or with a University Purchasing Card (see above). The University's Bookstore has been designated the University's preferred supplier for books.

COMPUTERS ON CAMPUS

Computers on Campus has been designated the University's preferred supplier for computers and related supplies. Computers and related supplies (from operating accounts) in excess of \$1000.00 may be purchased by completing a Requisition to Purchase (see next section) and forwarding it directly to Computers on campus. Computers and related supplies (from grant FOAPs) are to be forwarded to Purchasing Services for processing. If the item(s) cost less than \$1000.00, they may be purchased from the University Bookstore, by completing a Bookstore I.D. charge form available from the Bookstore at 474-8321 or 789-3601, or with a University Purchasing Card (see above).

REQUISITION FOR PAYMENT FORM (IN DEVELOPMENT)

Financial Services is currently exploring a method of directing requests to pay for memberships, subscriptions, conference registrations, license fees and other such expenses that cannot be paid by the Purchasing Card, directly through Supplier Services. This would eliminate the need to attach such requests to Requisitions to Purchase, involving Purchasing Services unnecessarily, and delaying the process. The Direct Payment Form will streamline the order placement and payment process for this product group, significantly. Also, keep in mind, you can currently place your orders for memberships, subscriptions and conference registrations with your Purchasing Card (see above).

WHAT IF MY NEED CANNOT BE MET BY ONE OF THE ABOVE PURCHASING PROGRAMS?

IS YOUR NEED OF A SERVICE NATURE?

If so, you need to ask yourself if an Independent Contractor Agreement (ICA) is required, or if your need is of an employment nature.

INDEPENDENT CONTRACTOR AGREEMENT (ICA)

Independent Contractor Agreements (ICAs) are designed to outline the agreement of services to be provided, the payment terms of those services and generally, to protect both the University and the supplier's interests in the performance of the services. ICA's are generally used for such services **over \$5,000** as consulting, interviewing, professional and/or expert advice, etc. If your service is under \$5,000, a requisition to purchase can be used and a regular PO is issued. Please see the attached Purchasing Services Directory (page 2) for further assistance in this area.

ICA forms are available on the Purchasing Services Website:

http://www.umanitoba.ca/admin/financial_services/purch/index.shtml

EMPLOYMENT

Very often, it is not an ICA that is required to have services performed, but simply an employment form. Canada Customs and Revenue Agency provides four test areas that are used to weigh whether the service provider would be considered an employee or an Independent Contractor. These tests would generally weigh in favor of employment if...

- 1) the work is being performed on University premises or on University equipment
- 2) the worker is under the supervision and control of the University
- 3) the worker is paid regardless of results achieved, and
- 4) the work is on going and is for an indefinite period of time.

This is a generalization of the test areas. Far more information would be required to make an informed decision. Employment should always be considered as your first choice. Please see the attached Purchasing Services Directory for further assistance in this area.

IF YOUR NEEDS CANNOT BE MET BY THE ABOVE PURCHASING PROGRAMS, AND DO NOT FALL INTO THE ICA OR EMPLOYMENT CATEGORY OF SERVICES, YOU WILL NEED TO COMPLETE A REQUISITION TO PURCHASE AND FORWARD THIS REQUISITION TO PURCHASING SERVICES.

The Requisition to Purchase form is available on the Purchasing Services Website:

http://www.umanitoba.ca/admin/financial_services/secure/requisition.html

COMPLETING YOUR REQUISITION TO PURCHASE FORM

Complete instructions are available on the Purchasing Services Website:

http://www.umanitoba.ca/admin/financial_services/media/reg_instruction.pdf

Be sure to always include your name, phone and fax number when completing this form, in the event we need to communicate with you. Please also keep in mind to always indicate the **true 'Required Date'** of your request. The notations of 'RUSH' or 'URGENT' alone are insufficient as they do not assist us in distinguishing the various levels of your needs.

Providing your ship to address code would help speed the processing of your request as well. To request a new ship to address code, or for further details, please contact Kristine Ward @ 474-7052 or Fax 474-7509.

WHAT DOES PURCHASING SERVICES DO WITH MY REQUISITION TO PURCHASE?

Purchasing Services will review your Requisition to Purchase to determine if there is any advice they might be able to provide you regarding your request (for example: alternate sources, products, ordering methods, etc.).

Depending upon the estimated value of your request and what is described on the requisition, Purchasing Services will either:

- 1) process your request by confirming the price of your request with your recommended supplier (normally for goods/services under \$1,000)
- 2) recommend alternate sources and/or methods of processing your request if the "Suggested Supplier" area is left blank.
- 3) obtain competitive quotes (RFQ) from alternate sources (feel free to recommend alternate sources on the Requisition to Purchase) when purchase is over \$1,000 or when requested in the body of the requisition (i.e. "Please request quotations")
- 4) initiate a Request for Proposals (RFP) process (RFP's are used to obtain proposed "solutions" to our needs), typically in conjunction with prior discussions with a Purchasing Consultant. Typically used for high dollar or complex purchases.
- 5) Initiate a Request for Information (RFI) process. RFIs are used to obtain information regarding proposed suppliers that could meet your needs. No purchase will result from an RFI.

The higher the estimated value and/or complexity of the purchase, the more involved the quotation/RFP process becomes. Competitive quotes (RFQs) or RFPs are required for goods or services exceeding \$1,000.

Please note that some suppliers are not set up to do business with an institution. Therefore, in rare cases we may be unable to purchase the product requested from the supplier indicated, even if justification is provided.

Please contact a Purchasing Services Consultant for more details.

HOW LONG DOES THE QUOTATION PROCESS TAKE?

You can expect your Requisition to Purchase to be acted upon within 48 hours following its receipt. It can take as little as one week, or up to four weeks to receive quotations on your requirements, depending upon the estimated value and complexity of your request.

Lower valued Purchase Orders (under \$5,000) are generally placed within one week of receiving an authorized Requisition to Purchase.

WHAT HAPPENS WHEN PURCHASING SERVICES RECEIVES THE QUOTATIONS / PROPOSALS?

Purchasing Services reviews the quotations, adds comments and/or advice as necessary, recommends the supplier (normally *lowest conforming bid) and forwards them to the requisitioner for review, usually in the form of a Bid Summary Analysis (BSA). Once the department has reviewed the information and a suitable supplier has been selected, the supplier is provided an official numbered Purchase Order which is issued by Purchasing Services.

* Lowest Conforming Bid – Lowest bid meeting the specifications of the Request for Quotes.

In the case of proposal responses to the RFP process, Purchasing Services will coordinate the joint evaluation of proposals with the requisitioner and other designated Evaluation Committee Members. Supplier selection is based on the scoring of the submissions in accordance with the evaluation criteria that is outlined in the RFP document. This criteria can include past experience, references, expertise of supplier, sustainable initiatives, cost, etc.

AT TIMES I AM TOLD THAT MY REQUISITION HAS BEEN FORWARDED TO ANOTHER DEPARTMENT FOR APPROVAL. WHY?

Your request may require the additional approval of one or more of the following areas which may take up to one business day in each area respectively.

Vice-President (Administration)

- Independent Contractor Agreements
- Equipment (other than computer related) exceeding \$ 100,000.00
- Computer related equipment exceeding \$100,000.00 (Operating accounts)

Legal Counsel

- Contractual terms and conditions for review and approval
- ICAs with amended conditions to the standard form.

Information Services and Technology

- If computer equipment does not comply with published minimum standards (does not apply to requisitions placed directly with Computers on Campus).
- Requisitions for audio visual equipment, to ensure compliance with University standards and possible recommendation of alternate equipment. Please note: Communication Systems offers extended warranties at nominal costs, to approved equipment.
- Any equipment that may impact on the operation of existing computer hardware or software.

Budget and Grant Accounting

- Expended account approval and/or invalid FOAP.
- Prior approval of CFI purchases, etc.

Supplier Payment Services

- New vendor – or address changes etc.

Asset Management

- New delivery location code – or changes.

Physical Plant

- Requests involving alterations to buildings/rooms/labs, etc.

WHAT IF MY PURCHASE REQUEST IS OF AN URGENT NATURE?

In the case of an emergency, contact Purchasing Services by telephone to discuss the situation. You should not make any purchase arrangements with the supplier prior to receiving an authorized Purchase Order. If your request requires immediate attention, but is not of an emergency nature, please specify the particulars of your need, such as the **specific 'required date' and reason for the urgency**, on your Requisition to Purchase. The notations of 'RUSH' or 'URGENT' alone are insufficient as they do not assist us in distinguishing the various levels of your needs.

THE PURCHASING DECISION

IS THE DECISION TO PURCHASE BASED ON THE LOWEST PRICE?

Not always. The decision to purchase should be based on the 'Best Overall Value', which takes into account many factors, such as:

- Unit price/Cost/Cost Structure
- Total cost of ownership
- Supplier reliability (including prior relationships)
- Product Reliability
- Technical support
- Quality of Product/Services (and suitability)
- Supplier Expertise (qualifications/experience)
- Sustainability of product/services
- Sustainability initiatives undertaken by the supplier
- Shipping and Packaging schedules and costs
- Warranties (existing and extended costs)
- Servicing, availability and costs of such
- Repair costs
- Installation costs
- Insurance's
- Import duties, fees and exchange values
- Taxes
- Payment schedules and discounts
- Cancellation options
- Trade-in options
- Government regulations
- Clarity of supplier proposal
- Value added services
- Other terms and conditions of the purchase

However, it is important to specify the criteria that will be used in the evaluation of bids received. A simple specification of a product "or equivalent" will normally result in a price evaluation only, i.e. lowest price will be selected. Ensure that you work with your Purchasing Consultant to most accurately describe your minimum need specifications and the evaluation criteria (if applicable).

HOW IS THE SELECTION OF THE PRODUCT OR SERVICE MADE?

Purchasing Services will evaluate all bid submissions considering the above criteria and other available and pertinent information, and advise the requisitioner of their recommendations, assisting them to make a 'Best Overall Value' purchase.

Request for Quotation (RFQ) awards are based on the "lowest conforming bid" meeting the specification minimum criteria. RFP's, as discussed earlier, are based on a combination of the highest scoring proposal, and lowest overall costs.

AM I NOTIFIED WHEN A PURCHASE ORDER HAS BEEN PROCESSED?

With the automated faxing system, you will either receive a “Confirmation Copy” or a “Receipt Notification” copy of the Purchase Order in most cases. “Confirmation” copies are for your files and require no further action from you. “Receipt Notification” copies however, do require your verification of receipt by return fax to Purchasing Services, once the goods are received.

*** Most P.O. copies are sent to your department’s designated fax machine through an automated faxing system, at the same time the supplier is faxed their copy. This fax number is electronically linked to the “Organization (Org)” in the FOAPAL noted on the requisition. If a different fax number is necessary, please indicate the change on the Requisition to Purchase form.

At times it is necessary to mail a PO copy to the requisitioner. Paper copies are necessary when: the supplier does not have a fax number; the PO is a same-day Rush; or where the PO requires an accompanying cheque to the supplier and cannot therefore be faxed through the automated PO fax system.

NOTE: PAYMENTS MADE WITHOUT POs, from your completed Requisition to Purchase (such as for memberships, subscriptions, conference registrations, or if your Requisition to Purchase is processed by Supplier Services’ Purchasing Card) are not confirmed with a PO. copy, as there is no PO generated with the payment.

CUSTOMS LIAISON (IMPORTS AND EXPORTS)

If you need any help or have any questions on the importation or exportation of goods through Canada Customs and Revenue Agency (CCRA), please contact John Fairman, Purchasing Consultant at 474-9697 or the Customer Service line at 474-8348. Please ensure you have a Purchase Order number for all imports, even for ‘No Charge’, ‘Sample’, or ‘Testing Purposes Only’ merchandise, for these goods must still clear customs and will be levied a G.S.T. and administrative charge by CCRA, based on their estimated value.

The University of Manitoba address should not be used for personal imports, as G.S.T. and administrative fees are levied by CCRA and erroneously charged to the University, causing unnecessary costs in the recovery of those charges from the staff member.

CENTRAL STORES FUNCTION (CENTRAL RECEIVING)

Prior to Systems Contracting, Central Stores, at the Fort Garry campus did carry a limited inventory of materials. Central Stores now serves as a distribution center for the receipt of Systems Contract materials from our suppliers and redistribution of those materials to the University units by the Physical Plant Department’s General Services.

The Fort Garry Central Stores/Receiving is now administered through Physical Plant and can be contacted at 474-7877. The Shipping/Receiving area of the Bannatyne Campus also provides a similar service and is operated through Purchasing Services.

Chargeable and non chargeable forms can be ordered through Central Stores/Receiving, by using the “Requisition for Supplies from Central Stores” form available on line at:

http://www.umanitoba.ca/admin/financial_services/purch/index.shtml

CHARGES IN FAST REPORTING

HOW WILL CHARGES APPEAR IN FAST?

PURCHASE ORDERS

Upon issuance of the Purchase Order, your budget/grant will be committed for the value of the order, including all applicable taxes and currency exchange rates. At the time that a supplier's invoice is entered against the Purchase Order, you will be charged the value of the invoice, including all taxes and applicable freight charges, but net of the G.S.T. rebate (normally 1.98%, reflecting the net effect of a 67% GST rebate), which will in turn reduce your commitment accordingly.

SYSTEMS CONTRACTS

These expenses will be charged to your budget/grant upon payment of the suppliers invoice, net of G.S.T. rebate (see above explanation), referencing the supplier's invoice number in the Invoice/Ref # field.

PURCHASING CARD

If Supplier Services placed your order by one of their Purchasing Cards, your requisition number and one of the Supplier Services staff 2-alpha codes will be referenced in the Invoice / Ref # field.

If your department placed the order by Purchasing Card, your requisition number and your cardholder's 2-alpha code will be referenced in the Invoice / Ref # field.

DO I HAVE ACCESS TO PURCHASING SERVICES TRANSACTIONS ON-LINE?

Yes – once you have taken Aurora Finance course 302, Purchase Requisition to Cheque Queries. The pre-requisite for this course is Aurora Finance 201 and it will soon be offered to all who are interested. In this course users will be shown how to view additional information on Banner Purchase Orders and Invoices. It is designed for those who have these tasks as part of their job and require more information than is available through FAST Reporting.

Other Financial Services Contacts

Comptroller's Office

Comptroller, Tom Hay	474-9507
Assoc Comptroller, Gord Pasieka	474-8713
Exec. Asst. Carleigh Collier	474-9668
Patti McNeill	474-8606

Budget & Grant Accounting Svces.

Manager, Kathleen Lylyk	474-9800
Budget Accounting	474-6394
Grant Accounting	474-8730
Ft Garry	474-8607
Bannatyne	474-3724

Purchasing Services

Manager, Paul Dugal	474-9907
Asst. Manager, ElLOWYN Nadeau	474-7987
Ft Garry	474-8348
Bannatyne (Candy Frobisher)	789-3347

Rev., Capital & General Acctg.

Manager, Marcia Bryson	474-8727
Customer Service	
Fort Garry	474-8246
Bannatyne	789-3349

Financial Systems Coordinator

Rob Dueck	474-6863
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Payroll Services

474-6632

Supplier Services

474-9825

Travel Services

474-8492
