



## SOLUTION WALKTHROUGH FOR PURCHASING JULY 2016 RELEASE

DATE: TUESDAY, NOVEMBER 10, 2015

TIME: 9:00AM – 12:00PM

LOCATION: 2000 EVERGREEN STREET, SACRAMENTO, CA 95815

ROOM: JADE/SAPPHIRE AUDITORIUM

<b>Facilitators:</b>	CMO: Richard Neil Business Team: Lee Xiong
<b>Meeting Purpose:</b>	Solution Walkthrough for Purchasing July 2016 Department Release
<b>Type of Meeting:</b>	

### AGENDA TOPICS/MINUTES

#	Topic <i>[Brief description]</i>	Presenter <i>[Name]</i>	Duration <i>[Time in Min.]</i>
1	Introduction	Michael Muth	5 Min
2	Overview / Objectives	Richard Neil	10 Min
3	Procurement Solution	Richard Neil/ Lee Xiong	60 Min
4	Sourcing Process Overview	Lee Xiong	30 Min
5	Purchase Orders	Richard Neil	20 Min
6	P-Card Process	Lee Xiong	15 Min
7	Receiving	Richard Neil	15 Min
8	Closing / Summary	Michael Muth	5 Min

### QUESTIONS AND ANSWERS

Q1: What is the difference between LPAs, CALPIAs, and other purchasing of items?	A1: The CALPIA catalog and LPAs list the items in the System. You can enter other items for other purchasing.
Q2: How do you do a purchase that is not an LPA or CALPIA?	A2: If it is not an item from a catalog, then on the requisition, you can just use the free form field to describe what needs to be purchased. When an item on a requisition is not in a catalog, the department buyer expands upon what is on the requisition when creating the PO, such as adding the UNSPSC code for the item being purchased, the vendor name, unit price, etc.
Q3: On page 28 at the bottom, it says a department event buyer can create a bidder profile. Can the buyer also create a bid for the bidder?	A3: Yes, the bidder can submit a bid by mail or email, and the buyer can enter the bid into the System on their behalf.
Q4: What if the vendor is statutorily exempt, and they are going to do 15,000 items, such as an expert witness. Who enters the items?	A4: It can be uploaded into the System. Supporting documentation can be attached to the solicitation. You put a general line item, then add an attachment with the details. There are some circumstances where it is not entered into the System, but attached. The line item would say "see attachment."



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<p>Q5: Are grants from a department going to be covered by another module?</p>	<p>A5: There is a grant module, but some departments are the grantor. That falls under a procurement contract. The grantor is the vendor, and there are job aids about how to do that. In such cases, the grants are procurement contracts.</p>
<p>Q6: Is there training and job aids for grants?</p>	<p>A6: Yes, there are, and there will be business process workshops, and online and instructor-led training and job aids.</p>
<p>Q7: In the work flow, where would the contract be sent to the vendor for wet signatures?</p>	<p>A7: That would depend on how you do it today. That is completely outside of the System. We have instructions in our training. Usually, it is when you get through all of the approvers, and then it is sent out as a hardcopy to the vendor for a signature. Some may have to send to the Office of Legal Services (OLS). Signatures are scanned.</p>
<p>Q8: Do you have to enter the contract in order to get the PO out?</p>	<p>A8: You can source the PO from the contract.</p>
<p>Q9: Are the contract and PO workflow two different things?</p>	<p>A9: Yes.</p>
<p>Q10: Sometimes we do fleet repairs. Can documents be uploaded?</p>	<p>A10: Yes, those documents can be uploaded. There is a workshop on fleet management.</p>