

## New MarketPlace Forms For FY11

There are 4 new forms for use **immediately** (for the remainder of FY10, and FY11). These forms are:

- Service Request Form - General & Professional Services
- Service Request Form - Maintenance, Repair, Rental & Lease
- Standing Order (Goods) – MarketPlace
- Standing Order (Goods) - Non-MarketPlace

These forms **replace** the old Standing Order form and the old Service Request form.

The simplest way to determine which of the two **types** of forms to use – IE, Service Request Form or Standing Order form – is to ask yourself: “Will something be delivered?” *In general*, if the answer is Yes, use one of the Standing Order forms. If the answer is No, use one of the service request forms. There are always exceptions to every rule, of course, but these are good general guidelines to follow.

Please note that all of these forms can be used to create standing orders. The Service Request forms can be used to create either one-time orders for services, or standing orders for services. The Standing Order forms should be used **ONLY** for standing orders for goods. Use either the catalog vendors in MarketPlace, or the Non-Catalog Item form, to create one-time orders for goods.

We ask that you use **these** forms *exclusively* for all standing orders and services. Please do **NOT** use the Non-Catalog Form for standing orders or services. The Non-Catalog Form should be used to order goods on a one-time basis, either through a brand new PO or as an order from your existing standing order.

See the chart on the next page for a quick summary of what form to use when.

On the following pages are detailed instructions for using each of these new forms.

<b>FORMS</b>	<b>USED FOR</b>
Non-Catalog Item Form	One time orders for items not in MarketPlace catalogs
Bottled Water Services	Standing order for Bottled Water
Hazardous Materials	One time order requires special approval
New Supplier Request Form	Requesting New Suppliers or updating existing supplier information
Office Supplies - Non Catalog Items (Strategic Business Products Only)	Office Supplies not found in Staples MarketPlace catalog
Order Modification Form	Processing all change order requests, including increases, decreases
Printer/Copier Lease Form	Standing Order for Capital Expense Equipment
Printing Services	Standings all printing services that cannot be performed by our University Print Shop
Radioactive Materials	One time order requires special approval
Service Request Form - General & Professional Services	Standing Order for Professional Services
Service Request Form - Maintenance, Repair, and Rental Lease	Standing Order for Maintenance, Repairs and Rental
Shredding Service	Standing Order used for Document Destruction
Sole Source \$2,500 to \$10,000	Order that only this vendor can fulfill - requires verbal quotes
Sole Source \$10,000 to \$27,500	Order that only this vendor can fulfill - requires 3 written quotes
Sole Source \$27,500	Order that only this vendor can fulfill - requires Bid Waiver process
Standing Order (Goods) MarketPlace	Standing Order for items found in MarketPlace (Deliverable)
Standing Order (Goods) Not in MarketPlace	Standing Order for items not found in MarketPlace
Vendor Quote Form (Special Pricing & Promotions)	Orders that have special pricing different than from MarketPlace catalog prices

## Service Request Form – General & Professional Services

Please use this form for most services **except** those related to maintenance, repairs, rentals or leasing. **If the item you are ordering is a physical *thing*, please do not use this form.**

**This form can be used to create a standing order (such as creating a PO for catering) or for a one-time order, such as paying for an advertisement in a newspaper or magazine.**

1. Please select a vendor.
2. Select a **Type of Service** from the drop-down list.
3. Enter a Quantity and an Estimated Cost.
4. Enter "1 EA - Each" for the Packaging.
5. Enter a commodity code. Below are some suggestions for service-related commodity codes:
6. Select a contract, if applicable.
7. Enter any attachments. You can enter internal attachments such as quotes or service contracts. These will be seen by University members only. You can also enter external attachments. These will be sent to the vendor along with the PO.
8. Click "Add and Go To Cart" if you are done, or "Add to Cart and Return" if you need to add another Service to your order.

### Some Suggested Commodity Codes

**81101508:** Architectural engineering  
**90101603:** Catering  
**90150000:** Entertainment  
**83110000:** Telecommunications, media  
**72130000:** General building construction  
**81112002:** Data processing or preparation  
**86000000:** Education and Training  
**80111620:** Temporary human resources  
**84131500:** Insurance  
**85131700:** Medical science and research services  
**82121507:** Stationery or business form printing  
**82111604:** Transcribing/Translation/Interpreting services  
**72102900:** Grounds maintenance  
**72102902:** Landscaping  
**77111500:** Environmental safety  
**93141808:** Occupational health or safety

For advertising, consulting, programming, training, or laboratory services, please search in the "Contains" field using one of these terms.

## **Suggested Account Codes for General & Professional Services**

Acct	Title	Acct	Title
702102	Telephone - Answering Service	702137	Medical records and Certificates
702103	Video / Multimedia Production	702138	Publication Cost
702104	Household and Security Service	702139	Shredding Costs
702105	Advertising	702141	PC Repairs
702106	Subscriptions and Memberships	702142	Technology Training
702107	Legal and Investigative	702143	PC Maintenance
702108	Subject Fees	702144	LAN Maintenance
702110	Entertainment and Meal Functions	702145	Technology Consulting
702112	Data Processing Services Purchased	702146	UMDware Computer Store
702119	Administrative Expense	702148	Management Fee
702120	Medical Services Purchased	702158	Subject Travel
702121	Recruiting Expenses	702159	Foreign Travel
702122	Records Management Services	702161	Insurance-Crime
702123	Educational Services Purchased	702162	Insurance-Fire/Property
702124	Honorariums	702163	Insurance-Boiler
702125	Employment Agency Fees	702164	Insurance-Automobile
702126	Collection Agency Fees	702165	Insurance-General Liability
702127	Conference Registration/Training	702167	Insurance-Other
702128	Food Services Purchased	702168	Insurance - SIFR Claims
702129	Bank Service Fees	702191	Communications Services-Voice
702132	Temporary Professional Services	702192	Communications Services-Data
702133	Statutory Review	702196	Data Service-Inventory
702134	Audit Fees	702197	Data Service-Data Circuit
702135	Consulting & Research Services		

## Service Request Form - Maintenance, Repair, Rental & Lease

Please use this form for services related to the **maintenance** and **repairs** of equipment or small machines such as faxes and copiers, and also for the **rental** or **lease** of equipment or property.

**This form can be used to create a standing order (such as creating a PO for a maintenance agreement with a vendor) or for a one-time order, such as an emergency repair that you need performed.**

1. Please select a vendor.
2. Select a **Type of Service** from the drop-down list. Use RM for standing orders, and NRM for one-time orders.
3. Enter a Quantity and an Estimated Cost.
4. Enter "1 EA - Each" for the Packaging.
5. Enter a commodity code. Below are some suggestions for service-related commodity codes:
6. Select a contract, if applicable.
7. Enter any attachments. You can enter internal attachments such as quotes or service contracts. These will be seen by University members only. You can also enter external attachments. These will be sent to the vendor along with the PO.
8. Click Add and Go To Cart if you are done, or Add to Cart and Return if you need to add another Service to your order.

**78180100:** Vehicle maintenance and repair services

**72101507:** Building maintenance service

**76111500:** General building and office cleaning and maintenance services

**81101705:** Power generation equipment maintenance or repair

**81111812:** Computer hardware maintenance

**85161500:** Medical or surgical equipment repair

**85161503:** Medical or surgical instrument maintenance or repair

**81101709:** General office equipment maintenance

**81101706:** Laboratory equipment maintenance

**81141504:** Equipment test calibration or repair

**78111808:** Vehicle rental

**80131500:** Lease and rental of property or building

### Suggested Account Codes for Maintenance/Repairs & Rental/Lease

Acct	Title
703101	RM-Building and Grounds
703102	RM-Vehicles
703111	RM-Office Equipment
703112	RM-Household and Security Equipment
703113	RM-Medical Equipment
703114	RM-Education and Rehabilitation Eqp

703115	RM-All Other Equipment
703201	NRM-Building and Grounds
703202	NRM-Vehicular Equipment
703210	Non Recurring Maintenance-Equipment
703211	NRM-Office Equipment
703212	NRM-Household and Security Equipment
703213	NRM-Medical Equipment
703214	NRM-Education and Rehabilitation Eq
703215	NRM-All Other Equipment
702113	Rent-Buildings and Grounds
702114	Rent-Records Management Storage
702115	Rent-Data Processing Equipment
702116	Rent-Other
702117	Lease/Purchase

## Standing Order (Goods) - MarketPlace

### WHEN TO USE THIS FORM

Please use this form **ONLY** if you are:

- Creating a Standing Order for tangible goods (things that would be delivered), and
- You **WILL** be placing the orders for these things in MarketPlace
- You will **NOT** be calling the orders in over the phone or using the vendor's external web site to order.

Do **NOT** use this form for standing orders for goods where you will be calling in orders over the phone. Use the **Standing Orders (Goods) - Non-MarketPlace** form instead.

Do **NOT** use this form for **Controlled Substances, Radioactive materials, Hazardous materials, or toxins**. These items cannot be ordered using a Standing Order per these departments' instructions.

Do **NOT** use this form for services of any kind. Please use one of the Service Request forms for things that will **NOT** be delivered.

### HOW DO I KNOW IF I NEED TO ORDER THROUGH MarketPlace OR NOT?

You need to order through MarketPlace when the vendor sells many types of goods. Examples of this would be Fisher Scientific, Sigma Aldrich, Denville Scientific and VWR.

You do **NOT** need to order through MarketPlace when you are buying a series of specific items from a vendor. Examples of this would be a standing order for flu vaccines, or a standing order for Botox, or getting gases delivered. We know what you are buying, so we don't need to collect any more data.

You also don't need to order through MarketPlace when you are buying different types of the same thing. An example of this would be a standing order for oligos or primers - you may be buying different oligos, but we know you are buying oligos, so again we don't need to collect any additional information.

Please remember, we are trying to capture data so that we can get better prices for our users. If we can say to a vendor, 'last year we spent \$180,000 on your glassware - give us a better discount' we will all benefit!

### WHAT DO I PUT FOR DESCRIPTION & COMMODITY CODE?

Please enter a general description of what you *will* be ordering. The more detail you can enter, the more likely the order will be approved. Select a commodity code that most closely matches

what you will be ordering. Please refer to the list of commodity codes that were handed out at your training class for some high-level general commodity codes.

### **HOW DO I ENTER A QUANTITY and PRICE?**

For these standing orders, simply enter an amount equal to the value of the order. You do not need to enter a Unit Price.

## Standing Order (Goods) - Non-MarketPlace

### WHEN TO USE THIS FORM

Please use this form **ONLY** if you are:

- Creating a Standing Order for tangible goods (things that would be delivered), and
- You **WILL NOT** be placing the orders for these things in MarketPlace, but instead
- Will be calling the orders in over the phone or using the vendor's external web site to order.

Do **NOT** use this form for standing orders for goods where you will be placing the orders in MarketPlace. Use the **Standing Orders (Goods) - MarketPlace** form instead.

Do **NOT** use this form for **Controlled Substances, Radioactive materials, Hazardous materials, or toxins**. These items cannot be ordered using a Standing Order per department instructions.

Do **NOT** use this form for services of any kind. Please use one of the Service Request forms for things that will **NOT** be delivered.

### HOW DO I KNOW IF I NEED TO ORDER THROUGH MarketPlace OR NOT?

You need to order through MarketPlace when the vendor sells many types of goods. Examples of this would be Fisher Scientific, Sigma Aldrich, Denville Scientific and VWR.

You do **NOT** need to order through MarketPlace when you are buying a series of specific items from a vendor. Examples of this would be a standing order for flu vaccines, or a standing order for Botox. We know what you are buying, so we don't need to collect any more data.

You also don't need to order through MarketPlace when you are buying different types of the same thing. An example of this would be a standing order for oligos or primers - you may be buying different oligos, but we know you are buying oligos, so again we don't need to collect any additional information.

Please remember, we are trying to capture data so that we can get better prices for our users. If we can say to a vendor, 'last year we spent \$180,000 on your glassware - give us a better discount' we will all benefit!

### WHAT DO I PUT FOR DESCRIPTION & COMMODITY CODE?

Please enter a general description of what you *will* be ordering. The more detail you can enter, the more likely the order will be approved. Select a commodity code that most closely matches what you will be ordering. Since you are using this form, you must have a fairly good idea of what you will be purchasing.

## **HOW DO I ENTER A QUANTITY and PRICE?**

For standing orders, enter a quantity equal to the value of the order, and a Unit Price of \$1. For example, for a \$750 order, enter a Quantity of 750, and a Unit Price of 1.