



University at Buffalo

Office of the Vice President for Finance and Administration

HOW TO PURCHASE YOUR SCIENTIFIC NEEDS

Business Day

October 26, 2023





Scientific Team

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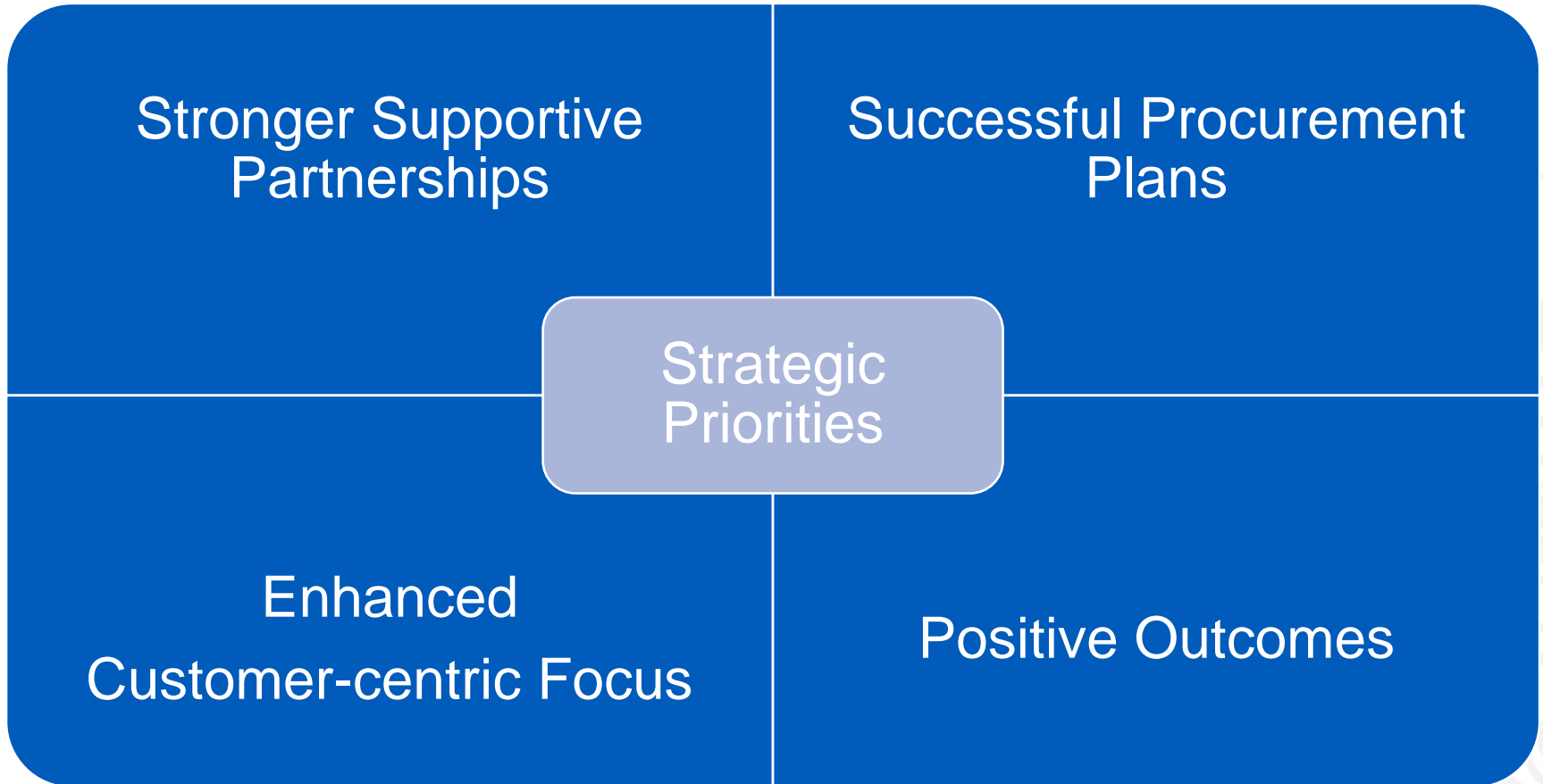
Strategic Scientific Procurement

Strive to provide the highest level of customer service to support faculty, staff and students engaged in Research & Clinical Activities and Economic Development Initiatives





How to achieve strategic research priorities



Team Approach

Scientific Team Commodities

- Capital Equipment - Specialized Scientific Systems
- Basic Equipment, Consumables, Analysis, MRO (Maintenance Agreements & Repairs)

Procurement Methodology


- Funding Source – State, RF, or UBF
- Obtaining Quotes and Performing Due Diligence
- Departmental Justification – Sole or Single Source





University at Buffalo

Office of the Vice President for Finance and Administration

A photograph of a female scientist with long dark hair, wearing a white lab coat, working in a biosafety cabinet. She is focused on her work, looking down at a pipette tip. The cabinet is filled with various laboratory equipment and supplies, including a multi-channel pipette, several bottles of red liquid, a rack of blue-capped microcentrifuge tubes, and other containers. The background is a metallic surface, and the lighting is bright, highlighting the workspace.

**Strategic Sourcing
Basic Equipment,
Consumables and MRO**



STRATEGIC SOURCING – BASIC EQUIPMENT, CONSUMABLES, MRO

NYS OGS Centralized Contracts (i.e. Fisher Scientific, Krackeler Scientific, Laboratory Products Sales)

System-Wide SUNY Contracts (i.e. VWR)

Preferred Sources (i.e. NYS Industries for the Blind), or MWBE (Laboratory Products Sales), SDVOB discretionary

Open Market (sole/single source, obtaining 3 quotes)

Purchasing Dollar Thresholds

For Procurement Cards (PCard)

State	RF	UBF
Per transaction limit is \$4,999; orders over limit use requisition process	Per transaction limit is \$2,500. Orders over limit use requisition process	Per transaction limit is \$2,500. Orders over limit use requisition process
Price must be reasonable	Price must be reasonable	Price must be reasonable
Transaction must be appropriate to grant or account	Transaction must be appropriate to grant or account	Transaction must be appropriate to grant or account
Tax exempt	Tax exempt	Tax exempt

Purchasing Dollar Thresholds

For Requisitions \$0 - \$2,499

State	RF	UBF
Price must be reasonable	Price must be reasonable	Price must be reasonable
Include quote or product specification	Include quote or product specification	Include quote or product specification
Estimated order time: 3 to 5 business days	Estimated order time: 3 to 5 business days	Estimated order time: 3 to 5 business days

*These timeframes assume the vendors are currently in the supplier file. New vendors may take up to two weeks. Purchasing has the final say in vendor selection

Purchasing Dollar Thresholds

For Requisitions \$2,500 - \$9,999

State	RF	UBF
Price must be reasonable	Price must be reasonable	Price must be reasonable
**Obtain a total of 2 quotes	Include quote or product specification	Include quote or product specification
Estimated order time: 3 to 5 business days	Estimated order time: 3 to 5 business days	Estimated order time: 3 to 5 business days

**All sole/single source procurements require written justification

*These timeframes assume the vendors are currently in the supplier file. New vendors may take up to two weeks. Purchasing has the final say in vendor selection

Purchasing Dollar Thresholds

For Requisitions \$10,000 - \$49,999

State	RF	UBF
Price must be reasonable	Price must be reasonable	Price must be reasonable
**Obtain a total of 2 or 3 quotes	**Obtain a total of 2 or 3 quotes	**Obtain a total of 2 or 3 quotes
Estimated order time: 5 to 15 business days	Estimated order time: 5 to 15 business days	Estimated order time: 5 to 15 business days

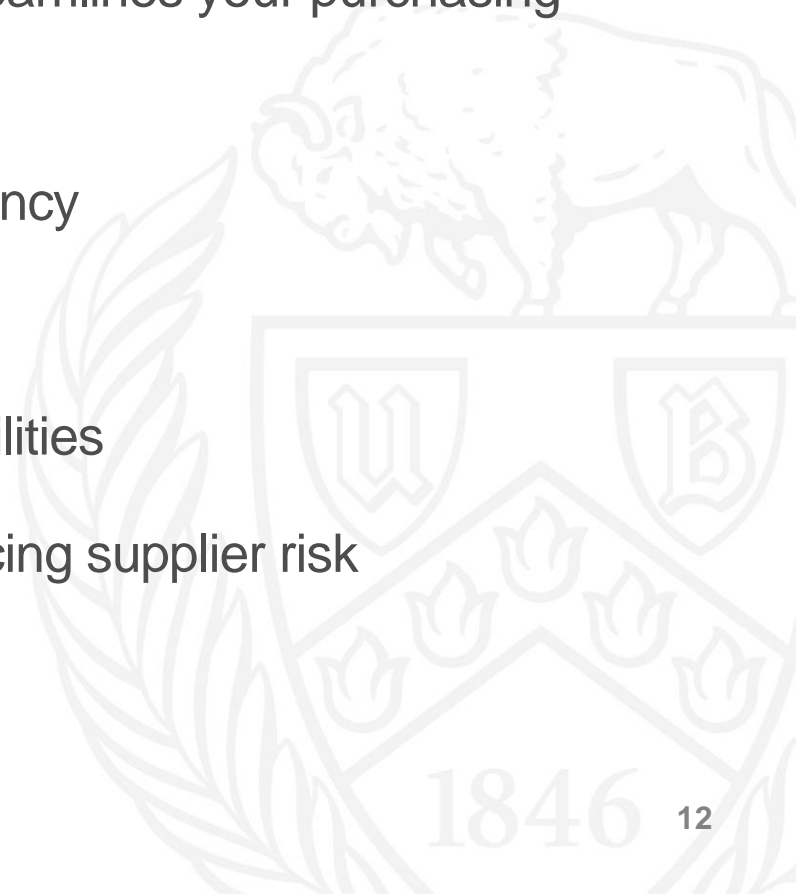
**All sole/single source procurements require written justification

*These timeframes assume the vendors are currently in the supplier file. New vendors may take up to two weeks. Purchasing has the final say in vendor selection

SHOPBLUE

UB's eProcurement system

- Centralizes strategic processes and streamlines your purchasing needs
- Improves visibility and maximizes efficiency
- Customizable user profiles
- Enhanced reporting and tracking capabilities
- Strengthens supplier partnerships reducing supplier risk
- Increased contract compliance



ShopBlue Homepage

The screenshot shows the ShopBlue homepage interface. At the top, there is a navigation bar with the University at Buffalo logo, the text 'SHOPBLUE', and a 'Saved to this PC' notification. Below this is a search bar with the text 'Search for products, suppliers, forms, part number, etc.' and a search button. To the right of the search bar are links for 'Go to: Favorites | Forms | Non-Catalog Item | Click Order' and 'Browse: Suppliers | Categories | Contracts'. The 'Non-Catalog Item' link is circled in red. Below the search bar are three main sections: 'Popular Guidelines', 'Quick Links', and 'Showcases'. The 'Showcases' section lists various categories: 'Preferred Source', 'Electronics', 'Laboratory Supplies', 'MRO Supplies', 'Office Supplies', and 'Special Requests'. The 'Laboratory Supplies' and 'Special Requests' items are circled in red. At the bottom left, there is an 'Organization Message' section.

Showcases – PunchOut and Catalog Suppliers

The screenshot displays a 'Showcases' interface with a green header bar. Below the header, there are several categories listed on the left side, each with a right-pointing arrow: 'Preferred Source', 'Electronics', 'Laboratory Supplies', 'MRO Supplies', 'Office Supplies', and 'Special Requests'. The 'Laboratory Supplies' category is expanded, showing a grid of supplier logos. The logos include: VWR (with a link 'Pref-Cert MWBE Reseller Avail'), BIO-RAD, Cell Signaling, Fisher Scientific, KRACKELER, Certified WBE, BioLabs, PerkinElmer, QIAGEN, and ThermoFisher Scientific (formerly Life Technologies). Each logo is contained within a white box with a small icon in the top right corner.

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Showcases – Special Requests (Forms)

The screenshot displays a web interface with a green header bar labeled "Showcases" and a menu icon. Below the header is a list of showcase categories, each with a right-pointing chevron icon:

- Preferred Source
- Electronics
- Laboratory Supplies
- MRO Supplies
- Office Supplies
- Special Requests

The "Special Requests" category is expanded, showing a grid of six form icons. Each icon features a blue header with the word "FORM" and a document icon in the top right corner. The forms are:

- FORM STANDING ORDER REQUEST
- FORM PAYMENT REQUEST
- FORM LAB ANIMAL REQUEST
- FORM SERVICE REQUEST
- FORM TRADEMARK MATERIALS REQUEST
- FORM EH&S REQUEST



Add Non-Catalog Item

Add Non-Catalog Item

Existing Supplier

Select Supplier

Item

Product Description *	Catalog No.	Quantity *	Price Estimate	Packaging
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	EA - Each

254 characters remaining

Additional Details

Product Flags

- Controlled substance
- Recycled
- Hazardous material
- Radioactive
- Rad Minor
- Select Agent
- Toxin
- Energy Star
- Green









Add Internal Attachments

★ Required fields



Save Save And Add Another Line Close

Shopping Cart – Proceed to Checkout

University at Buffalo | SHOPBLUE
All Search (Alt+Q) 2,034.67 USD

Shopping Cart • 176497995



Assign Cart
Proceed To Checkout

Simple | Advanced

Search for products, suppliers, forms, part number, etc.



2 Items

Life Technologies Corporation • 3 Items • 2,034.67 USD

SUPPLIER DETAILS 030ePAY : Bank of America Lockbox Services, 12088 Collections Center Drive, Chicago, Illinois 60693 United States

Need to make changes? [MODIFY ITEMS](#) | [VIEW ITEMS](#) Item(s) was retrieved on: 9/7/2023 1:13:09 PM

- ProLong Gold Antifade Mountant with DNA Stains DAPI
- Fetal Bovine Serum, MaxSpec

Item	Catalog No.	Size/Packaging	Unit Price	Quantity	Ext. Price
 ProLong Gold Antifade Mountant with DNA Stains DAPI	P36935	EA	126.67	1 EA	126.67
^ ITEM DETAILS Commodity Code: 41116113-1200000-532000 <small>Cytology reagents or solutions or stains</small>					
 Fetal Bovine Serum, MaxSpec	A4766801	EA	954.00	2 EA	1,908.00
^ ITEM DETAILS Commodity Code: 41116121-1200000-532000 <small>Hematology reagents or solutions or stains</small>					

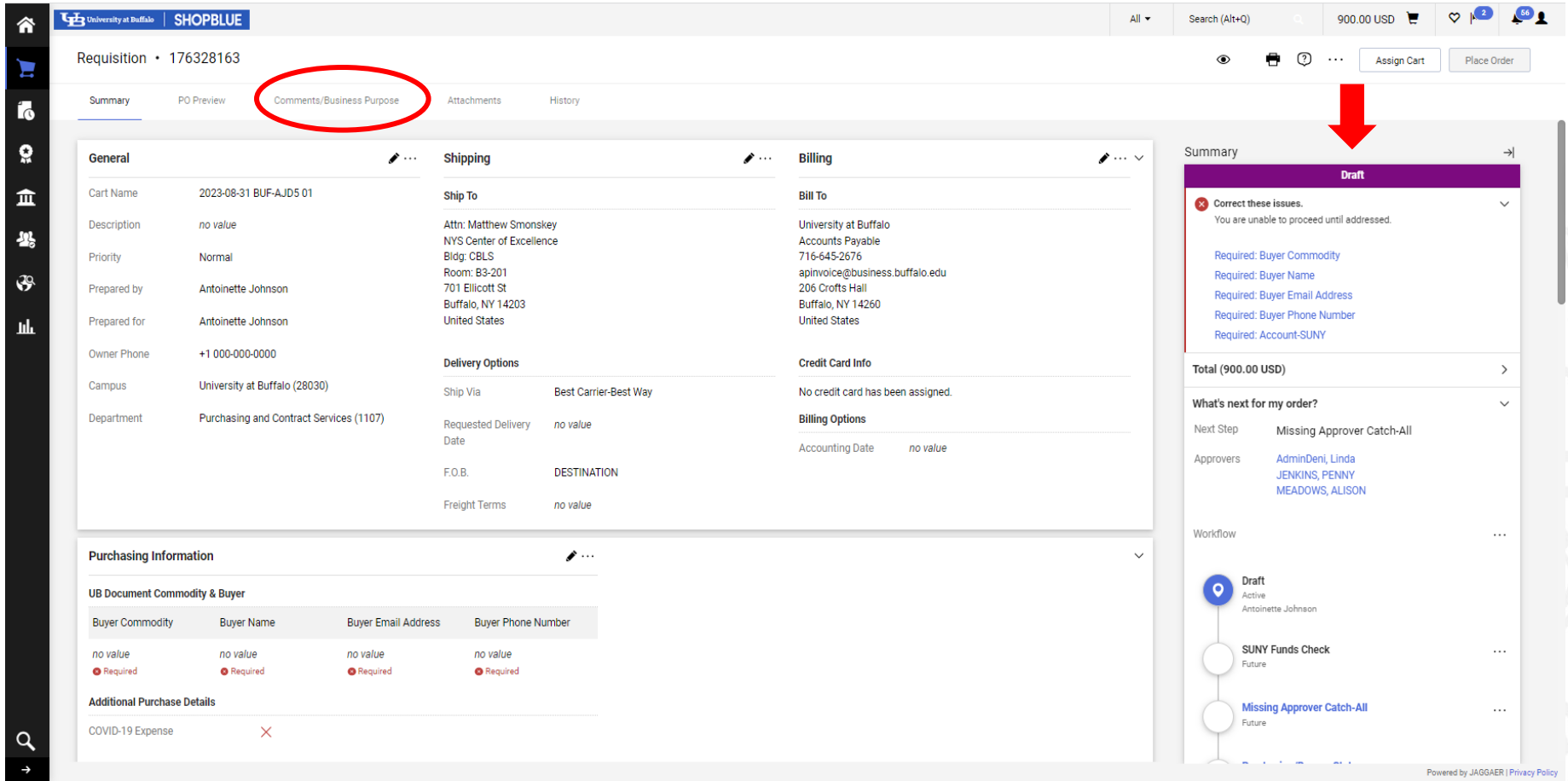
Summary

Details

Total (2,034.67 USD)



Requisition – Overview



University at Buffalo | SHOPBLUE | All | Search (Alt+Q) | 900.00 USD | Assign Cart | Place Order

Requisition • 176328163

Summary | PO Preview | **Comments/Business Purpose** | Attachments | History

General

Cart Name: 2023-08-31 BUF-AJD5 01

Description: no value

Priority: Normal

Prepared by: Antoinette Johnson

Prepared for: Antoinette Johnson

Owner Phone: +1 000-000-0000

Campus: University at Buffalo (28030)

Department: Purchasing and Contract Services (1107)

Shipping

Ship To: Attn: Matthew Smonskey, NYS Center of Excellence, Bldg: CBLS, Room: B3-201, 701 Ellcott St, Buffalo, NY 14203, United States

Delivery Options: Ship Via: Best Carrier-Best Way

Requested Delivery Date: no value

F.O.B.: DESTINATION

Freight Terms: no value

Billing

Bill To: University at Buffalo, Accounts Payable, 716-645-2676, apinvoice@business.buffalo.edu, 206 Crofts Hall, Buffalo, NY 14260, United States

Credit Card Info: No credit card has been assigned.

Billing Options: Accounting Date: no value

Purchasing Information

UB Document Commodity & Buyer

Buyer Commodity	Buyer Name	Buyer Email Address	Buyer Phone Number
no value	no value	no value	no value
Required	Required	Required	Required

Additional Purchase Details

COVID-19 Expense: X

Summary

Draft

Correct these issues. You are unable to proceed until addressed.

- Required: Buyer Commodity
- Required: Buyer Name
- Required: Buyer Email Address
- Required: Buyer Phone Number
- Required: Account-SUNY

Total (900.00 USD)

What's next for my order?

Next Step: Missing Approver Catch-All

Approvers: AdminDeni, Linda JENKINS, PENNY MEADOWS, ALISON

Workflow:

- Draft (Active) - Antoinette Johnson
- SUNY Funds Check (Future)
- Missing Approver Catch-All (Future)

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Comments/Business Purpose

The screenshot displays the SHOPBLUE requisition system interface for requisition 176328163. The 'Comments/Business Purpose' tab is selected and highlighted with a red circle. A modal window titled 'ADD COMMENT' is open, featuring a text area, a recipient selection dropdown (with 'Add recipient' circled in red), and attachment options. The right sidebar shows a 'Summary' section with a 'Draft' status, a list of required fields (Buyer Commodity, Buyer Name, Buyer Email Address, Buyer Phone Number, Account-SUNY), a total of 900.00 USD, and a workflow diagram with steps: Draft (Active), SUNY Funds Check (Future), and Missing Approver Catch-All (Future).

University at Buffalo | SHOPBLUE

Requisition • 176328163

Summary | PO Preview | **Comments/Business Purpose** | Attachments | History

ADD COMMENT

This will add a comment to the document. If you select a user they will receive an email indicating that a comment has been added to the document.

Email notification(s) **Add recipient**

Antoinette Johnson (Approved) <ajd5@buffalo.edu>

Attach file (optional)

Attachment Type

File

Link/URL

File Name

File

Choose File | Upload your file

Summary

Draft

Correct these issues.
You are unable to proceed until addressed.

Required: Buyer Commodity
Required: Buyer Name
Required: Buyer Email Address
Required: Buyer Phone Number
Required: Account-SUNY

Total (900.00 USD)

What's next for my order?

Next Step: Missing Approver Catch-All

Approvers: AdminDeni, Linda JENKINS, PENNY MEADOWS, ALISON

Workflow

Draft
Active
Antoinette Johnson

SUNY Funds Check
Future

Missing Approver Catch-All
Future

Accounting Codes

RF Approval Certification

RF Only: Office Supplies Certification: Approvers- Approval also certifies exclusive scientific or programmatic use for the project charged.

Accounting Codes

Accounting Codes

Account Source	Fiscal YR-SUNY	Account-SUNY	Full/Partial-SUNY	Project-RF	Project End Date	Task-RF	Award-RF	Award End Date	Award Type	Exp Major-RF	Exp Minor-RF	TTO Docket-RF
S State	2023 Fiscal Year 2023-2024	no value Required	Partial Partial	N/A RF Only	N/A RF Only	N/A RF Only	N/A RF Only	N/A RF Only	N/A N/A	N/A RF Only	N/A RF Only	no value

SUNY Object

i values vary by line

UB Foundation

UBF-Fund

no value

Account String

no value

Internal Notes and Attachments

Internal Note: no value
 Comment 1: no value
 Internal Attachments: Add

External Notes and Attachments

Note to all Suppliers: no value
 Attachments for all suppliers: Add
 PO Clauses: 3 Edit | View details

Summary

Draft

✘ **Correct these issues.**
 You are unable to proceed until addressed.

Required: Account-SUNY

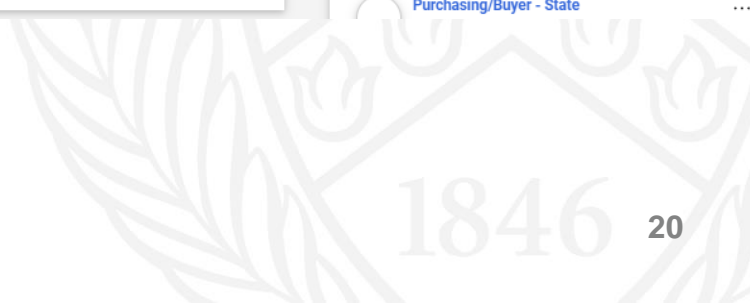
Total (51.20 USD)

What's next for my order?

Next Step: Missing Approver Catch-All
 Approvers: AdminDeni, Linda Jenkins, Penny MEADOWS, ALISON

Workflow

- 📍 **Draft**
Active
Antoinette Johnson
- SUNY Funds Check**
Future
- Missing Approver Catch-All**
Future
- Purchasing/Buyer - State**



Accounting Codes

Accounting Codes

Account Source *	Fiscal YR-SUNY *	Account-SUNY *	Full/Partial-SUNY	Project-RF *	Project End Date	Task-RF *	Award-RF *	Award End
S	2023	Search	Partial - Partial	N/A	N/A	N/A	N/A	N/A

Profile Values
R - Research
S - State

Organization Values
R - Research
S - State
UBF - UB Foundation - Remember to change the Bill To Address

Search

UB Foundation

UBF-Fund Account String

Search

★ Required fields

Save Close



Accounting Codes

Edit Accounting Codes

Accounting Codes

Project End Date	Task-RF *	Award-RF *	Award End Date	Award Type *	Exp Major-RF *	Exp Minor-RF *	TTO Docket-RF
N/A	N/A	N/A	N/A	N/A	N/A	N/A	

SUNY Object

UNSPSC/Commodity	Object
<input type="text" value="Search"/>	<input type="text"/>

UB Foundation

UBF-Fund	Account String
<input type="text" value="Search"/>	<input type="text"/>

★ Required fields

Save Close





University at Buffalo

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A photograph of a laboratory setting. In the foreground, there is a large piece of white scientific equipment with a control panel. In the background, several people in white lab coats are working at various pieces of equipment, including what appears to be a biosafety cabinet. The room is well-lit with overhead lights. The text 'Strategic Sourcing Capital Equipment Specialized Scientific Systems' is overlaid on the bottom half of the image in a blue, serif font.

Strategic Sourcing Capital Equipment Specialized Scientific Systems



STRATEGIC SOURCING – CAPITAL EQUIPMENT

NYS OGS Centralized Contracts (i.e. Agilent, Life Technologies, PerkinElmer, Philips Healthcare, Shimadzu, Siemens, Thermo Electron, Waters)

System-Wide SUNY Contracts (i.e. VWR, Medline)

Consortium Contracts (i.e. E&I Cooperative)

Healthcare Contracts (i.e. Premier Healthcare)

MWBE (Laboratory Products Sales, Cara Medical) or SDVOB discretionary

Open Market (discretionary or formal IFB based on dollar value, sole/single source)

Purchasing Dollar Thresholds

For Requisitions \$50,000 - \$74,999

State	RF	UBF
Advertised in New York State Contract Reporter	Price must be reasonable	Price must be reasonable
**Obtain a total of 3 quotes	**Obtain a total of 3 quotes	**Obtain a total of 3 quotes
Purchasing may determine a sealed bid is required	Federally funded purchases require debarment forms, Visual Compliance, or System for Award Management check	
*Estimated order time: up to 1-2 months	*Estimated order time: 3+ weeks	*Estimated order time: 3+ weeks

**All sole/single source procurements require written justification

*These timeframes assume the vendors are currently in the supplier file. New vendors may take up to two weeks. Purchasing has the final say in vendor selection

Purchasing Dollar Thresholds

For Requisitions \$75,000 - \$124,999

State	RF	UBF
Advertised in New York State Contract Reporter	Price must be reasonable	Price must be reasonable
**Obtain a total of 3 quotes	**Obtain a total of 3 quotes	**Obtain a total of 3 quotes
Pre-Approval by Attorney General and Office of the State Comptroller is required	Federally funded purchases require debarment forms, Visual Compliance, or System for Award Management check	
Purchasing may determine a sealed bid is required		
*Estimated order time: up to 3-5 months	*Estimated order time: 3+ weeks	*Estimated order time: 3+ weeks

**All sole/single source procurements require written justification

*These timeframes assume the vendors are currently in the supplier file. New vendors may take up to two weeks. Purchasing has the final say in vendor selection

Purchasing Dollar Thresholds

For Requisitions \$125,000+

State	RF	UBF
Advertised in New York State Contract Reporter	Price must be reasonable	Price must be reasonable
**Minimum of 5 sealed bids solicited by Purchasing (only Purchasing can perform bidding)	**Obtain a total of 3 quotes	**Obtain a total of 3 quotes
Pre-Approval by Attorney General and Office of the State Comptroller is required	Federally funded purchases require debarment forms, Visual Compliance, or System for Award Management check	
Purchasing may use discretion to award a MWBE/SDVOB supplier		
*Estimated order time: up to 4-6 months	*Estimated order time: 3+ weeks	*Estimated order time: 3+ weeks

**All sole/single source procurements require written justification

*These timeframes assume the vendors are currently in the supplier file. New vendors may take up to two weeks. Purchasing has the final say in vendor selection

International Orders

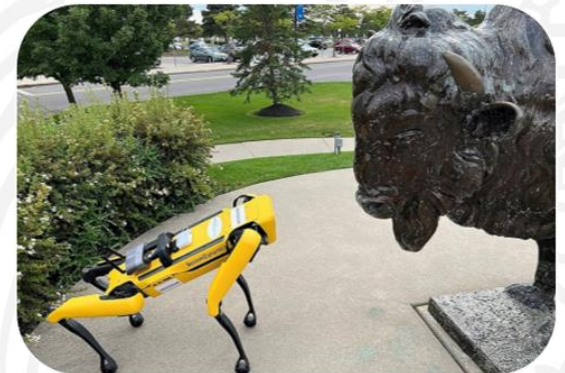
- Is there a U.S. distributor or alternative product?
 - Consider all costs, including currency conversion, shipping, customs fees and duties/tariffs
- Formal quote required regardless of dollar amount
 - Quotes in foreign currency must be converted to US Dollars when entering requisition; final amount based on exchange rate at time of payment
 - New vendors must complete W-8 form, Order Preferences/Sourcing/Contact form
 - Subject to Visual Compliance check
- Payment terms must be reviewed
 - Foreign vendors often request 100% payment in advance, which is not allowable using any funding source
 - Payment terms to be negotiated
 - Many foreign vendors will not accept PCard

International Orders

- Proper documentation is required for filing with US Customs and Border Protection (CPB). Includes coordination between the university's customs broker, vendor/shipper and Importer of Record
 - Customs Broker: FedEx Trade Networks; JFK-Brokerage@fedex.com
 - UB will be billed by FedEx for customs fees and duties; department or PI that placed initial order is responsible for payment of this invoice
- Necessary Steps to Import Compliance
 - Valuation of Goods – informal/formal entry
 - Classification – vendor must provide an accurate description of goods for proper Harmonized Tariff Schedule (HTS) identification
 - Duties/Tariffs – differ based on HTS code and country of origin
 - 25% tariff on items imported from China
 - Proper Documentation
 - Importer Security Filing (ISF)
 - Bill of Lading (BOL)
 - Packing List
 - Commercial Invoice
 - Record Keeping – compliance of 5 years

Campus Projects

- Philips 3T MRI – Clinical and Translational Research Center
- Buffalo Manufacturing Works – High Bay
- Spot Robot Dog – Institute for Artificial Intelligence and Data Science





Frequently Used Vendor Contacts

- Bio-Rad Laboratories: rep Catherine Valley; cathie_valley@bio-rad.com; 724-234-8519
- Fisher Scientific: rep Caitlyn Gilday; caitlyn.gilday@thermofisher.com; 716-327-4312
- Krackeler Scientific: rep Jennifer Bristol; jlb@krackeler.com; 518-462-4281 x116
- Laboratory Products Sales: rep James Schanck; jschanck@LPSinc.com; 800-388-0166
- Life Technologies: rep Jennifer Nassivera; jennifer.nassivera@thermofisher.com; 716-481-5412
- VWR, aka Avantor Sciences: rep Kristen McGuire; kristen.mcguire@avantorsciences.com; 716-331-5025



University at Buffalo

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Questions?

How did we do?

Take the *Session Survey* on your smart device using the QR code on your schedule.

