

WELCOME  
TO CBS2

## OVERVIEW OF CBS2 SERVICES

- How to submit requests
- Notifications & tracking
- Tips
- Questions

# SHARED SERVICES AVAILABLE TO SSHA

## Purchasing & non-travel reimbursements:

- Memberships, sponsorships, promotional items, gift cards
- Publishing & transcription fees
- Catering, guest lodging, speakers/performers, honorariums
- Services/independent contractors
- FedEx labels, phones, software
- Invoice processing
- New vendor setup
- Travel reservations
- Travel & entertainment reimbursements



UC Merced's Administrative Coordination Team (ACT) is a team of professionals committed to providing the highest level of customer service to the campus by performing work efficiently and effectively, while constantly implementing best practices in the areas of finance and personnel services.

## Who ACT Supports

The Office of the Chancellor, SSHA, ORED, and the Divisions of Finance & Administration and Facilities & Campus Operations



**SUBMIT A REQUEST**

(ServiceNow)



**SERVICE LEVEL AGREEMENT**



**REPORT**



**CUSTOMER SURVEYS**



UNIVERSITY OF CALIFORNIA

MERCED

ADMINISTRATIVE COORDINATION TEAM (ACT)

Division of Finance and Administration

Search this site...

## Services

### PURCHASING

- [Purchasing and Non-Travel Reimbursements](#)
- [Invoice Processing](#)
- [Mobile Device Purchases \(Cell Phone/MiFi\)](#)
- [Software Purchasing](#) NEW!
- [New Vendor Set-Up](#)
- [Procurement Card Receipts](#)

### TRAVEL & ENTERTAINMENT

- [Travel & Entertainment Reimbursement](#) UPDATED!
- [Travel Reservations](#)

# Purchasing and Non-Travel Reimbursements



[Submit A Request](#)

## Description

To submit a request for purchasing, non-travel and entertainment reimbursements, and recharges. Also includes preparing and submitting requisitions to Procurement Services for processing (all services, purchases above \$10K, restricted items, agreement renewal and request for international vendors).

## Customer's Responsibility

Provide quote or detailed description of goods/services, vendor information, account information (Full Accounting Unit [FAU] or nickname), need-by date, business justification and approval(s). If it is an unauthorized purchase, completed documents must also be included.

## ACT's Responsibility

Prepare in CatBuy and submit to vendor or Procurement Services for processing. If the request requires a requisition, ACT will monitor until a purchase order (PO) is received from Procurement Services and the vendor has been contacted.



Upload files



Select this request to purchase supplies, equipment, services, and to request non-travel related reimbursements.

Submit



### Requestor Information

\* Requested By:

Tony Smullen



Contact Number:

209 631 9360

Department:

Administrative Coordination Team



Requested On Behalf Of (optional):



### Short Request Description

\* Short Request Description

Asterisks are required, but include as much as possible to enhance processing efficiency

#### Request details

Enter Line Items here (Item #, Description, Vendor, Unit Price, & Quantity). If it is a large order, upload documents that describe the items.

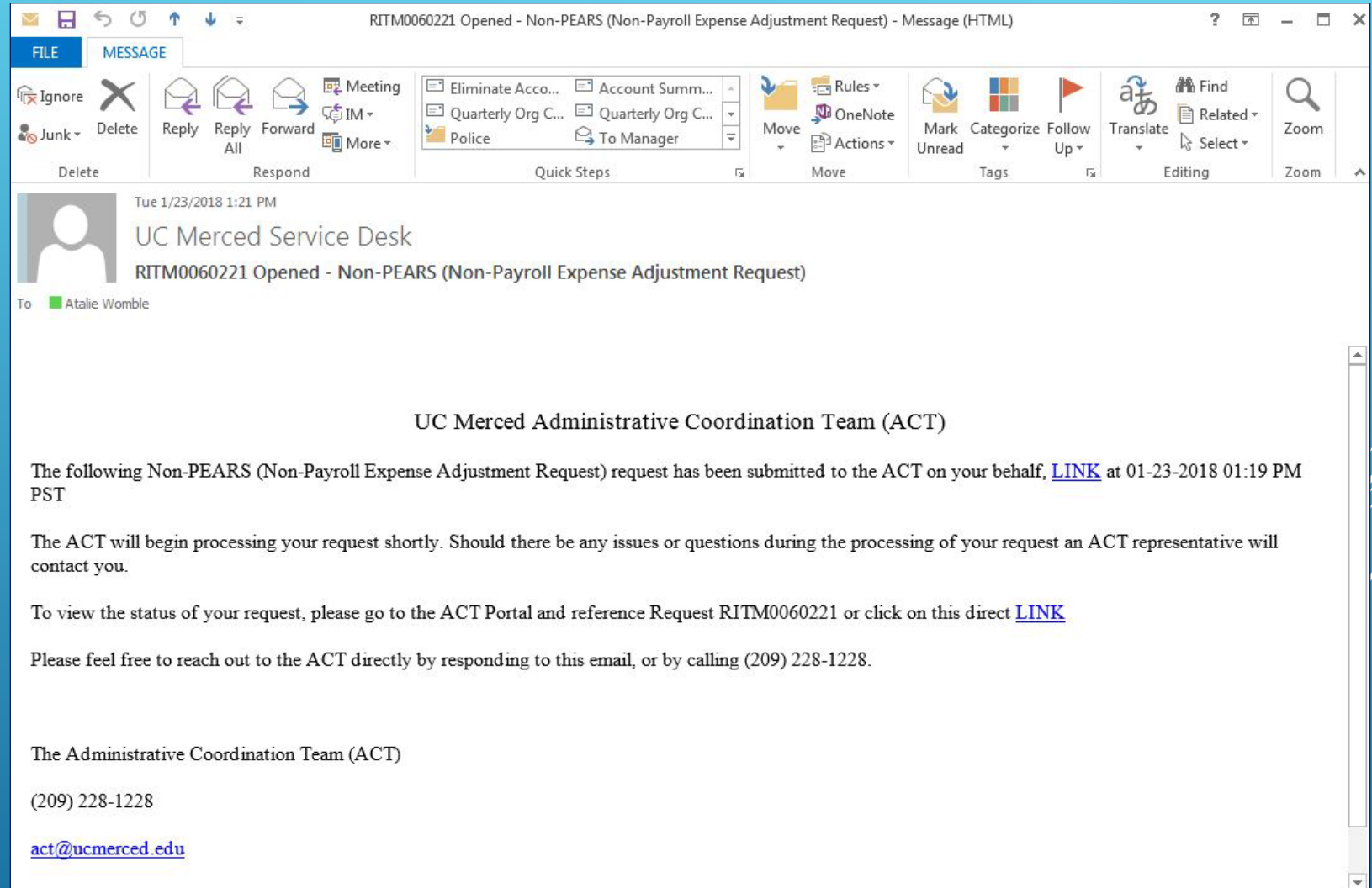
\* Purpose / Business Justification for request

"Why" (not "what")

# SERVICENOW NOTIFICATIONS

## Confirmation of submission:

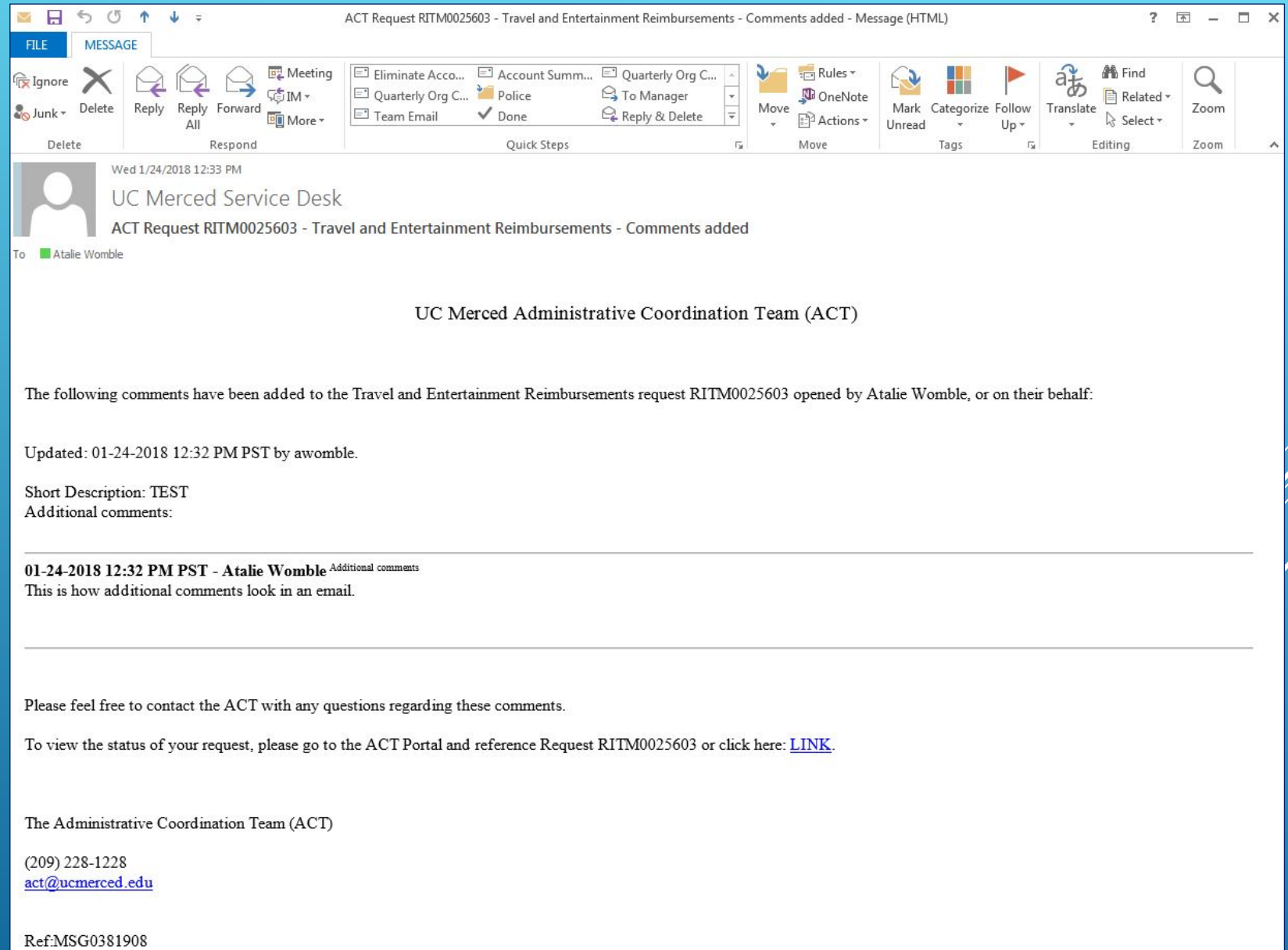
- RITM# at top of screen (scroll up)
- System generated E-mail to requestor



# SERVICENOW NOTIFICATIONS

## Comments added:

- Informational or call to action
- ACT-staff generated
- Scroll down
- Reply all



ACT Request RITM0025603 - Travel and Entertainment Reimbursements - Comments added - Message (HTML)

FILE MESSAGE

Ignore X Delete Reply Reply All Forward Meeting IM More

Eliminate Acco... Account Summ... Quarterly Org C... Quarterly Org C... Police To Manager Team Email Done Reply & Delete

Move OneNote Actions

Mark Unread Categorize Follow Up

Translate Related Select

Delete Respond Quick Steps Move Tags Editing Zoom

Wed 1/24/2018 12:33 PM

UC Merced Service Desk

ACT Request RITM0025603 - Travel and Entertainment Reimbursements - Comments added

To Atalie Womble

UC Merced Administrative Coordination Team (ACT)

The following comments have been added to the Travel and Entertainment Reimbursements request RITM0025603 opened by Atalie Womble, or on their behalf:

Updated: 01-24-2018 12:32 PM PST by awomble.

Short Description: TEST  
Additional comments:

---

**01-24-2018 12:32 PM PST - Atalie Womble** Additional comments  
This is how additional comments look in an email.

---

Please feel free to contact the ACT with any questions regarding these comments.

To view the status of your request, please go to the ACT Portal and reference Request RITM0025603 or click here: [LINK](#).

The Administrative Coordination Team (ACT)

(209) 228-1228  
[act@ucmerced.edu](mailto:act@ucmerced.edu)

Ref:MSG0381908





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# "My Orders" shows all your past requests

Home ACT Services Approvals My Orders

Requested Items [Default view] Search Created Search 1 to 100 of 150

All > Request Requested for is Atalie Womble .or. Request Opened by is Atalie Womble > Item = General Purchasing .or. Item = Invoice Processing .or. Item = Travel Reservations .or. Item = Travel & Entertainment Reimbursements

	Number	Priority	Item	Assigned to	State	Short description	Created	Opened by	Requested for	Updated
<input type="checkbox"/>	<a href="#">RITM0107792</a>	4 - Low	<a href="#">General Purchasing</a>	<a href="#">Sarah Anderson</a>	Waiting for Customer	Pay renewal of Certification Fee for ICC Certified Building Official - Expires 9/12/19	08-14-2019 4:28:57 PM	<a href="#">Atalie Womble</a>	<a href="#">Gini Krippner</a>	08-15-2019 10:03:52 AM
<input type="checkbox"/>	<a href="#">RITM0106537</a>	4 - Low	<a href="#">Invoice Processing</a>	<a href="#">Elias Vargas</a>	Closed Complete	Iron Mountain Invoice BTXM551 - DCC shred bins June 2019 billing	07-31-2019 11:41:15 AM	<a href="#">Atalie Womble</a>	<a href="#">Atalie Womble</a>	08-06-2019 2:08:19 PM
<input type="checkbox"/>	<a href="#">RITM0105524</a>	2 - High	<a href="#">General Purchasing</a>	<a href="#">Laura Purkey</a>	Closed Complete	RUSH: computer for Bobbi Ventura-Henderson	07-17-2019 4:41:16 PM	<a href="#">Atalie Womble</a>	<a href="#">Allison Costa</a>	07-23-2019 4:04:40 PM

## What's next?

- ACT seeks SSHA Financial funding approval and process request
- ACT updates requester when appropriate
- Deliveries are handled within SSHA; returns by ACT

# Reminders and Questions

- Check BobcatBuy for supplies/equipment and Amazon orders
- Reimbursed items become property of UC Merced
- Travel reimbursements should have all details of travel from beginning to end.

