

Department CAOs/MSOs CBS2 Buyers and Department Buyers,

As you may be aware, UC Merced's legacy financial systems hosted at UCLA are being replaced with our new Oracle Cloud application as part of the Alpha Financials Project. Bobcat Buy will also be transitioning to the Oracle platform on the same timeline. Bobcat Buy, supported by the Oracle Platform, will continue to feature the key elements of the current platform (with enhancements) to better support your procurement needs including more catalogs, form requests, and non-catalog purchasing needs. As part of the transition to the new system, we need your help to begin Cat Buy Purchase Order (PO) conversion clean-up (i.e., getting your department's current purchase order information transferred over from the old system to the new one) so that your departments are ready for the January 2021 Go-Live.

Specific criteria for which purchase orders will be converted to Oracle have been developed for each purchase order class and that information is detailed in the table below. **It is very important that we limit the purchase orders that will be converted to only those purchase orders that have ongoing services after January 2021 or which goods will be delivered under after January 2021.** All other purchase orders, should be fully received, invoiced and closed prior to our conversion to Oracle. This is necessary to close out the legacy system as well as convert open purchase orders to Oracle.

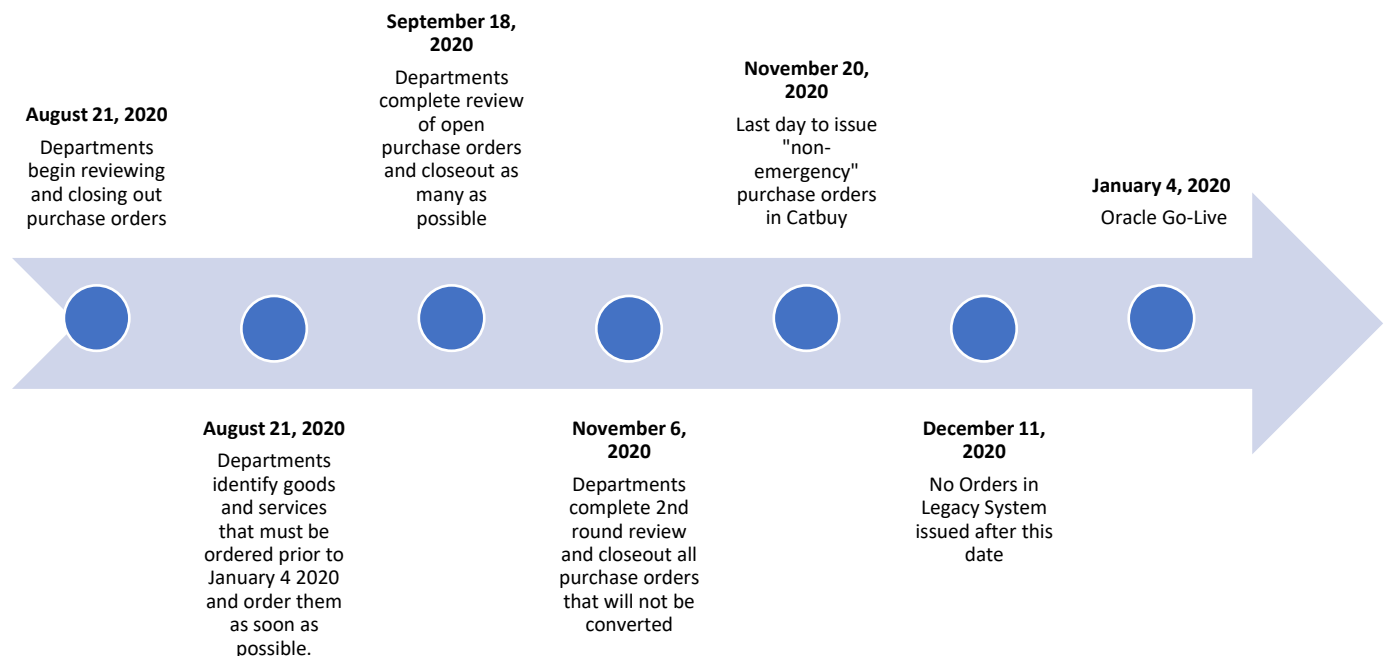
We ask that you take the following three actions:

- 1) **Begin cleaning up your department's Cat Buy purchase orders by closing out all non-required POs by end of day on September 18, 2020.** We recommend running reports by order class (i.e., A, C, N, etc.) to see what's currently outstanding in your department. **Procurement services and the Center for Business Services & Solutions (CBS2) will also be reviewing orders that appear to have no expected activity for the remainder of the year and will be reaching out to departments and suppliers to confirm and close those orders.**
- 2) **Do not create any new Cat Buy POs in the legacy system that will be received after end of day November 20, 2020 unless absolutely necessary.** (i.e., if there is an item that is expected to be received after November 20, 2020, you are strongly encouraged to place the order in the new Oracle Platform, as services on the legacy platform will be suspended and made unavailable going forward). All POs that need to be received between November 20, 2020 and January 4, 2021 should be created and given to suppliers prior to end of day November 20, 2020.

- 3) Any orders made in the legacy system after end of day November 20, 2020 will need to be manually created as requisitions and approved by departments in the new Oracle system with a reference back to the CatBuy Purchase Order. These orders must clearly reference the **Catbuy Purchase Order and include a note in each line item that this is a “confirming purchase order only.”** Please plan your purchases accordingly to avoid delivery between November 20, 2020 and January 4, 2021. All purchases made after Go-Live must be made in the new Oracle system.

Below is the table outlining key details pertaining to Purchase Order Class, Scope, and Criteria for PO Conversion clean-up. You'll notice that several Purchase Order Classes towards the top **will NOT be converted**--these existing purchase orders should be closed out as soon as possible and any that will result in goods or services being delivered after November 20 will require the order to be manually recreated in Oracle. For the Purchase Order Classes towards the bottom that will be converted, please review your department's collection by Purchase Order Class and work to close and clean up these Purchase Order Classes by September 18, 2020. **Please run a report out of Cat Buy for each Purchase Order Class to get your department's most current counts.**

Visual Timeline



Purchase Order Class	Description	Will this order class be converted?	Extraction Criteria	Procurement Team actions at deadline
A	Releases on Blanket Agreements	No	N/A	N/A
C	Consultant Agreements	No	N/A	N/A
F	Catalog	No	N/A	N/A
I	FedEx Punchout	No	N/A	N/A
N	Low Value Orders & Employee Reimbursements	No	N/A	N/A
Q	Procurement Card	No	N/A	N/A
R	Requisitions	No	N/A	N/A
U	Catalog	No	N/A	N/A
Z	Construction & Related	No	N/A	N/A
K	Campus Wide Blankets = CPA/BPA	Created Manually	Selective list provided by Procurement – will be manually created	Procurement Services will continue to manage campus wide contracts in order to streamline procurement for campus users.
B	Department Blankets = Amount Based Purchase Orders	Selectively Convert	Open blankets with activity on or after January 1, 2019 will be converted	As of November 20, 2020, prior to final extract for production data – close POs with no activity after January 1, 2019
G	SubAwards	All	All	N/A

H	Long Term Lease	All	All	N/A
L	Real Estate Rental	All	All	N/A
M	Educational Media	All	All	N/A
P	Purchase Order	Selectively Convert	Activity on or after January 1, 2019	As of November 20, 2020, prior to final extract for production data – close POs with no activity after January 1, 2019
S	SubContracts	All	All	N/A
T	Travel	All	All	N/A
X	Special Items	All	All	N/A
Y	Construction & Related	All	All	N/A

Please work with your shared services (CBS2) team or local department buyer to close out necessary orders and plan for future procurement needs during this cutover. For any issues or concerns that cannot be addressed with your CBS2 or local department staff, please email procurement@ucmerced.edu

Thank you for your time and cooperation!
-The Supply Chain Leadership Team

Interested in learning more about the Alpha Financials Project?

Check out the website for more information: <https://alphafinancials.ucmerced.edu/>