

***Key Contacts Guide to  
the University Supplier  
Database***



## ***Table of Contents***

---

<b>Requesting Access .....</b>	<b>3</b>
Search Only.....	3
Access to request new supplier, amend or reactivate .....	3
<b>Logging on and Searching Suppliers (Full Access only).....</b>	<b>4</b>
<b>Amending Supplier Details.....</b>	<b>7</b>
<b>Adding a New Supplier Site.....</b>	<b>10</b>
If Supplier is 'Inactive' or 'Deactivated'.....	10
<b>Reactivating an Inactive Supplier .....</b>	<b>11</b>
<b>Adding a New Supplier .....</b>	<b>13</b>
<b>Viewing Supplier Requests and Re-Submitting.....</b>	<b>16</b>

## ***Requesting Access***

---

There are two levels of access to the on-line supplier database.

### **Search Only**

---

This level is available automatically to employees who use CUFS and have a Raven ID and password.

The purpose of the search facility is to alert staff to existing suppliers and preferred suppliers that may already exist on the system. These should be reviewed and preferably used before a request to set up a new supplier is submitted. Guidance on how to use the search only facility is covered in a separate guide.

### **Access to request new supplier, amend or reactivate**

---

This level of access is available to key contacts and allocated individuals to search, request a new supplier, amend or reactivate an existing supplier.

To access the database a [Raven password](#) is required. Once the individual who requires full access has a Raven password the Departmental Administrator must e-mail [UFS\\_Suppliers@admin.cam.ac.uk](mailto:UFS_Suppliers@admin.cam.ac.uk) with the individuals CRSID.

It is essential that the Departmental Administrator e-mails the helpdesk with the level of authority required on the system so that they can authenticate the CRSID onto the database to enable the correct access.

# Logging on and Searching Suppliers (Full Access only)

Navigate to: UFS Home Page, Suppliers, New Suppliers, Reactivations and Supplier Amendments, Supplier Database

1. You will need to log on with your **CRSID** and **Raven password**. Once you have logged on the following screen will display.

From this screen, you can amend your email address and phone number if it is incorrect, by clicking on **here** as these details will be used should Procurement Services need to contact you.

### Supplier Search and Request

**Welcome Rebecca Darlow**

Your email address is recorded as Rebecca.Darlow@admin.cam.ac.uk and your telephone number as 65985. You can change these [here](#)

In the event of a query or assistance, please click on the white i in the blue square on the right

[Continue](#)

[Click here](#) to display and manage your new suppliers  
[Click here](#) to display and manage your amendment and reactivation requests

2. Click on **Continue** to display the **Supplier Search** Screen.

[Clear form](#)

### Supplier Search

Type the start of one or more of the fields and click on the Go button [Go](#)

Name  [i](#)

1st line of address

VAT/Co. registration number  [i](#)

Post code

Keyword  [i](#)

Supplier number  [i](#)

[i](#) Type(s) of Supplier  Contractor  
 Employee  
 Individual  
 Internal  
 Public Sector Companies  
 Related  
 Students  
 Supplier  
 Select all

Commodity  [Go](#) [i](#)

Commodity code  [i](#)

Commodity description  [i](#)

[Go](#)

[Additional search tool](#)

The [i](#) icon gives you guidance as to what information is required for that particular field.

3. Search for the supplier that you wish to purchase from or use to ensure that it is not already loaded on the system. You can search for a supplier in a number of ways:

<b>Name</b>	No limit to the number of characters, part or full name of supplier and no need for the wildcard (%).
<b>First line of address</b>	First line of supplier's address
<b>VAT/Registration No</b>	Supplier's VAT or company registration number if known.
<b>Postcode</b>	Supplier's postcode.
<b>Keyword</b>	Enter an item relating to your supplier, e.g. paper and click on the Go button. All suppliers which have that keyword assigned to them will then be displayed.
<b>Supplier number</b>	Use this field if you want to search for an existing supplier by its number. This unique number will have been generated by CUFS when the supplier was first created.
<b>Types of Supplier</b>	If unsure leave the Select all box ticked.
<b>Commodity</b>	Using the drop down list select the commodity you wish to search for. Use the blue information icon next to this field for further information.
<b>Commodity code</b>	Is the first letter of the category code to indicate the category that the items falls under, for example A = Audio Visual and Multi-Media.

Once you have completed the relevant search fields, click on any of the **Go** buttons to see whether there is a supplier that matches your search criteria.

A further search tool is also available, which can be accessed via the **Additional Search Tool** button. To use this, enter a word in connection with the supplier you are searching for, e.g. paper and a list of matches will display. Click on the most appropriate match to view a list of suppliers which have been attributed to the matching word.

4. If a supplier already exists in the database that matches your search criteria a summary of the supplier will display. In this scenario I searched using the word **Paper**

## Key Contacts Guide to the University Supplier Database

Information: rad53 is permitted to search  
 Information: There are 6 PREFERRED SUPPLIERS that match your search criteria  
 Information: There are 30 suppliers that match your search criteria

	Name	Type	Supplier number	Note	Keywords	
<a href="#">Details</a>	BUNZL UK LTD T/A BUNZL CLEANING & HYGIENE SUPPLIES	Supplier	73778	BUNZL CLEANING & HYGIENE SUPPLIES LTD. Centrally agreed T&C's apply (Via SUPC framework). Contact Procurement Services for more details.	CLEANING, JANITORIAL, DISPOSABLE PAPER PRODUCTS	Preferred
<a href="#">Details</a>	EBSCO INTERNATIONAL INC.	Supplier	60925	Centrally agreed T&Cs apply to this contract. Contact Procurement Services for more info. EBSCO INFORMATION SERVICES	Newspapers, periodicals, archive, journals, magazines, monthly/ quarterly publications	Preferred
<a href="#">Details</a>	LYRECO UK LTD	Supplier	76405	Centrally agreed T&Cs apply to this contract. Contact Procurement Services for more info.	PRINTER CARTRIDGES, INK CARTRIDGES, TONER, PRINTER RIBBONS, FAX, FAXSIMILE EQUIPMENT, PRINTER/PHOTOCOPIER PAPER, STATIONERY, PENS, MARKERS, PENCILS	Preferred
<a href="#">Details</a>	OFFICE DEPOT UK LTD	Supplier	61141	Centrally agreed T&Cs apply to this contract. Contact Procurement Services for more info. Formerly: GUILBERT OFREX LTD Contact:Tasmin Smith	printer cartridges, ink cartridges, toner, printer ribbons, fax, faxsimile equipment, printer/photocopier paper, stationery, pens, markers, pencils, p	Preferred
<a href="#">Details</a>	OFFICE TEAM LTD	Supplier	269116	Centrally agreed T&Cs apply to this contract. Contact Procurement Services for more info.	PRINTED ENVELOPES, PRINTER & INK CARTRIDGES, TONER, PRINTER RIBBONS, FAX EQUIPMENT, PRINTER/PHOTOCOPIER PAPER, STATIONERY, PENS, MARKERS, PENCILS	Preferred
<a href="#">Details</a>	SWETS INFORMATION SERVICES LTD	Supplier	72600	Centrally agreed T&Cs apply to this contract. Contact Procurement Services for more info.	Newspapers, periodicals, archive, journals, magazines, monthly/ quarterly publications	Preferred

[New search](#)   [Add new supplier](#)   [Display all suppliers](#)

Preferred suppliers matching your search criteria will be displayed first and are colour coded in green. Wherever possible, the University encourages you to use a Preferred Supplier. For further information on Preferred Suppliers, access the Preferred Suppliers section on the Procurement Services website - <http://www.admin.cam.ac.uk/offices/purchasing/suppliers>

5. If your supplier is not displayed on the Preferred Suppliers list, click on **Display all suppliers**.
6. If your supplier:
  - is on the full list and does not show as Inactive or Deactivated no further action is required as the supplier is already set up to use.
  - is showing as **Inactive** or **Deactivated** refer to the section 'If a Supplier is **Inactive**' or **Deactivated**'.
  - is not showing on the full list at all refer to the section '**Adding a New Supplier**'.
7. To view the full details of a supplier on the list, click on **Details**. The information will include current and deactivated site addresses. If supplier details need updating you have the option of clicking on '**Amendment request**'.

## Amending Supplier Details

Company names and addresses can only be changed if you are in possession of an official document detailing the relevant change. Examples of such documents could include a letter from the company stating the change, or a copy of an invoice headed with the company's new name or address.

The document should be forwarded to the Accounts Payable office at the Finance Division preferably by adding a scanned document as an attachment to the request online, faxing a copy or if you do not have a scanner or fax or need to send an original, via the UMS. **Note that original documents are always required for changes to bank account details.**

**Pre-Requisite:** Search for supplier, click on supplier details, Amendment request

A screen will display with important information which will help reduce the amount of time it takes to process your amendment. Please read this carefully.

To reduce the time taken to process your request, please provide full information and supporting documentation to support your request. Failure to do so may lead to a delay in your request being processed. 1

For purchasing, evidence of quotations or dispensation must be submitted in line with Financial Regulations.

For invoicing a copy of the invoice must be submitted.

We are able to accept documents via the following methods:  
Attachment to this online request (preferred)  
Fax: 01223 765094  
Email: ufs\_suppliers@admin.cam.ac.uk

UMS to:  
Accounts Payable  
Finance Division, Greenwich House  
Madingley Rise  
Madingley Road, CB3 0TX

Priority will be given to those requests using the attachment method.

---

**THIS IS A PREFERRED SUPPLIER**

**Amendments to existing suppliers**

Please be aware that any requests for amendments to company names or addresses will only be accepted and actioned if they are accompanied by official documentation regarding the relevant change. This may be in the form of an actual letter from the company stating the change or a copy of an invoice headed with the company's new name or address. The designated departmental contact should forward the required information to the Accounts Payable team at the Old Schools. Fax No (7)65094, Email ufs\_suppliers@admin.cam.ac.uk

Supplier		
Name	SWETS INFORMATION SERVICES LTD	Amend
Number	72600	
Enabled	Y	Amend
Supplier type	Supplier	
Pay terms	End +30 Days	f
Pay group	Supplier	f
Active from	14-Sep-2000	Amend
Active until		Amend
Vat number	749957067	Amend
Note	Centrally agreed T&Cs apply to this contract. Contact Procurement Services for more info.	Amend
Status	Preferred	Amend
Commodity Code	BD - JOURNALS	Amend

1. Find the line that contains the information that you want to change and click on the **Amend** button.

**Note:** If you require either the pay terms or pay group to be amended, please contact Accounts Payable.

2. The screen that follows once you click on **Amend** will vary depending on the line detail you wish to amend. Amend the information as required and click **Continue**.

- The system will return to the amendments screen and your proposed amendment will be highlighted in yellow. This must now be authorised by clicking on the **Authorise** button.

Supplier Site		
Name	BURY	Amend
Purchasing	Y	Amend
RFQ only	N	Amend
Payment	Y	Amend
Address_1	Po Box 444	Amend
Address_2		Amend
Address_3		Amend
Address_4		Amend
Town/City	Bury	Amend
County/State		Amend
Postcode/Zip	BL8 9AP	Amend
Province		Amend
Country	GB	Amend
Telephone area code		Amend
Telephone number		Amend
Fax area code		Amend
Fax number		Amend
Pay terms	Net 30	
VAT number		Amend
Inactive date		Amend
Active	Y	Amend

BL89 3DR

- The next screen will ask you to enter a reason as to why you wish to make this amendment. Enter the appropriate comments such as the supplier changing address, telephone number etc.

If relevant, include any information on what you need to purchase, the value of the purchase and whether any other suppliers have been contacted for quotes etc or if not, whether a dispensation has been granted as this will help your request be processed more quickly.

Please state whether the amendment is needed to raise an invoice or purchase order, and whether it is for a one-off transaction.

In the event of a query or assistance, please click on the white i in the blue square on the right

Reason for amendments

© 1998-2011 University of Cambridge, The Old Schools, Trinity Lane, Cambridge CB2 1TN  
Information provided by webmaster@admin.cam.ac.uk, 5 May 2011

Accessibility | Privacy

- Click on **Authorise**.

In the event of a query or assistance, please click on the white i in the blue square on the right

---

© 1998-2011 University of Cambridge, The Old Schools, Trinity Lane, Cambridge CB2 1TN  
Information provided by webmaster@admin.cam.ac.uk, 5 May 2011

Accessibility | Privacy

6. If you have any supporting documentation, you will now be able to attach it by clicking on the **Add supporting document** button.
7. If your request is for purchasing and invoice has not yet been raised we can accept **company headed documents e.g. a quote** to support the request. Please use this if you require a payment site, all supplier requests must have a **relevant copy invoice** attached.

If you would like to receive an email detailing your proposed amendments, click the **Email me details** button.

This information will now be sent electronically to Procurement Services for approval.

## Adding a New Supplier Site

Use this facility to add a new address to the supplier's record. NB - You should not amend an existing site if it is a completely new site

**Pre-Requisite:** Search for supplier, click on supplier details, Amendment request

1. At the bottom of the screen click on **Add Site**. The system will then generate a blank form for you to fill in with the new supplier address. You must click on the amend button adjacent to each line you wish to add information to. Each amendment must then be authorised.

Pay terms	End +30 Days	<a href="#">?</a>
VAT number	554 5005 60	<a href="#">Amend</a>
Inactive date		<a href="#">Amend</a>
Active	Y	<a href="#">Amend</a>

2. Follow the "Amending Supplier Details" instructions above.

### If Supplier is 'Inactive' or 'Deactivated'

If a supplier is shown as:

#### Inactive

- Supplier has not been used during the last 18 months.
- It can be reactivated. Refer to the reference guide "[Reactivating an Inactive Supplier](#)" below.

#### Deactivated

- These are either duplicate suppliers or suppliers that have ceased trading or are in administration. No further action can be taken. The supplier name is also prefixed with (\*\*).

## Reactivating an Inactive Supplier

It is possible to submit a request to reactivate an inactive supplier.

1. Find the supplier that you wish to reactivate. For further information refer to the reference guide “Searching for Suppliers”.
2. Click on the **Details** button adjacent to the supplier that you want to reactivate.
3. Scroll to the bottom of the page and click on the **Reactivate** button.
4. Complete all of the fields on this screen. An example is shown below.

UNIVERSITY OF CAMBRIDGE Finance Division

University of Cambridge > University Offices > Finance Division > UFS > Search and Request

Supplier Search and Request UAT i

Welcome Oliver Harper

If you have technical problems with this web application you can contact the software developer Chris Sendall by [email](#) or by phoning 39653.

Information: ojh24 is permitted to request reactivation

Reason for reactivation

Only supplier that can supply 120 g/sm paper for calligraphy art use.

Do you need to

Is this a

Value of goods/services/works

Factors that you will need to consider are:

- The reason for reactivating the supplier.
- Do you require the reactivation for raising a purchase order or paying an invoice?
- Do you need the reactivation for a one-off or repeat purchase/payment?
- How much does your department expect to spend with this supplier?
- If your request relates to a purchase, whether any other suppliers (please list them) have been contacted for quotes etc or if not, whether a dispensation has been granted.

The information will help Procurement Services to confirm that you have followed the University’s Financial Regulations in the tendering and selection of your supplier. **Failure to provide adequate information may result in your request being rejected.**

5. Click on the **Reactivate** button.

Note that you may be contacted by the Finance Division if there are any queries surrounding your reactivation request. Finance must be satisfied that there is a valid reason for the reactivation before the request is actioned.

After clicking on the Reactivate button, you will have the opportunity to amend the supplier details and attach any supporting documentation. For further information refer to the guidance notes "Amending Supplier Details" at:  
[http://ufs.admin.cam.ac.uk/reference/upgrade/purchasing/amending\\_supplier.pdf](http://ufs.admin.cam.ac.uk/reference/upgrade/purchasing/amending_supplier.pdf)

If you do not wish to amend the supplier details, at this point you can close your web browser or select another task from the bottom of the page.

## Adding a New Supplier

If the supplier is not listed at all in your search results, you will need to request a new addition to the supplier database.

1. Scroll to the bottom of your search results and click on the **Add New Supplier** button.

Information: pag25 is permitted to search  
Information: There are 9 suppliers that match your search criteria

	Name	Type	Supplier number	Note	Keywords		
<a href="#">Details</a>	BIOPTICA	Supplier	9000887	New record uploaded into UFS 10-Oct-2007 cjs2 (Chris Sendall) (Number 231146, active from 04-Oct-2007)	Training Courses	Inactive	New
<a href="#">Details</a>	BIOPTICA	Supplier	231146		Training Courses	Inactive	
<a href="#">Details</a>	DOUGLAS CONNECT	Supplier	9000298	New record uploaded into UFS 28-Sep-2007 cjs2 (Chris Sendall) (Number 229363, active from 05-Sep-2007)	Training Courses	Inactive	New
<a href="#">Details</a>	DOUGLAS CONNECT	Supplier	229363		Training Courses	Inactive	
<a href="#">Details</a>	MSA INTERACTIVE LTD T/A CAMBRIDGE HR SUMMIT	Supplier	9000330	New record uploaded into UFS 28-Sep-2007 cjs2 (Chris Sendall) (Number 229564, active from 12-Sep-2007)	Training Courses	Inactive	New
<a href="#">Details</a>	MSA INTERACTIVE LTD T/A CAMBRIDGE HR SUMMIT	Supplier	229564		Training Courses	Inactive	
<a href="#">Details</a>	Rostrum Training Solutions Limited	Supplier	9000920	New record uploaded into UFS 03-Oct-2007 cjs2 (Chris Sendall) (Number 231035, active from 03-Oct-2007)	Training Courses	Inactive	New
<a href="#">Details</a>	ROSTRUM TRAINING SOLUTIONS LIMITED	Supplier	231035		Training Courses	Inactive	
<a href="#">Details</a>	SUE TRINDER LTD	Supplier	232687		CONSULTANCY, TRAINING		

[New search](#) [Add new supplier](#) [Display all suppliers](#)

2. Select the type of supplier on the next screen and click **Continue**. Move your cursor over the blue information icon for further information on each of the supplier types available.

New Supplier Online Application Initial Form

Overall type of supplier

Individual  
 Business  
 Non profit making bodies

[Continue](#)

- Complete all of the fields on this screen. If you do not enter any information in a required field, the system will advise you and you will need to go back and correct this. Type in capitals.

New Business Supplier Online Application Form

**Is this urgent?**  Yes  No

**Supplier Details**

Supplier or Contractor name

Type of business  -please select-  
 Limited company  
 Public limited company  
 Foreign limited company  
 Other

Department

Company registration number

Is this a contractor?  Yes  No

VAT registered  Yes  No

VAT number

CUFS transaction code

**Site 1**

Site uses  -please select-  
 Payment only Site  
 Purchasing and Payment Site  
 Purchasing Only Site

Site name (town)

Address line 1

Address line 2

Address line 3

Address line 4

Town/City

County

Country

Postcode/Zip

Telephone area code

Telephone number

Fax area code

Fax number

Tax code

Add another site

**Purchase Details**

Do you need to

Is this a

Value of goods/services/works

State what items you wish to buy or have already bought

List all other suppliers approached for alternative quotations

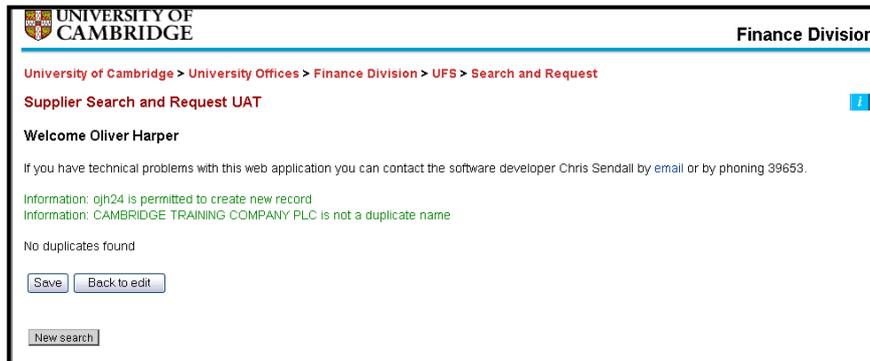
Reason why existing supplier cannot be used

Only select a request as urgent if this is genuinely the case. This will allow Procurement Services to prioritise requests.

These fields will help Procurement Services to confirm that you have followed the University's Financial Regulations in the tendering and selection of your supplier. Relevant information includes full details on what you need to purchase, the value of the purchase and whether any other suppliers (list them) have been contacted for quotes etc or if not, whether a dispensation has been granted. **NB Failure to provide adequate information may result in your request being delayed or rejected.**

- Click **Continue**.

- The next screen will summarise the information that you entered on the previous page. If you notice any errors such as a spelling mistake, click on **Back to edit**, correct the error and re-submit the form. Once you are happy with your selections, click **Check for Duplicates before Save**. The system will cross reference the new information with all existing suppliers to double check that it does not already exist:



The system will not only cross reference the supplier name at this point, but also other fields such as the address and VAT number. If possible matches are found, they will be displayed on the above screen. If you recognise any of these to be your supplier, abandon the process at this stage by closing your web browser.

If you have any supporting documentation, you will now be able to attach it by clicking on the “Add supporting document” button.



- Click **Save** to finish your request. Scroll to the bottom of the next screen and click on **Email me details** if you would like to receive an email detailing your new request. Alternatively, read the section “Viewing Supplier Requests” to view your request online.

Your request will now be sent electronically to the appropriate office at the Finance Division, who will make the necessary checks on the supplier. Once these checks have been made, one of two things will happen:

- The request will be approved and the supplier will be added into CUFS.
- The request will be rejected. If this happens, you will receive an email detailing the reason for this and if applicable it will also ask you for further information and you will need to resubmit your request.

Information will also be sent to the Tax office if you are creating an individual. It is possible to view the status of your requests for new suppliers and amendments. The next section looks at this process.

## Viewing Supplier Requests and Re-Submitting

After logging on using your Raven ID and password, the Welcome screen displays.

1. To view your current requests and their status, click on **manage your new suppliers** or **manage your amendment and reactivation requests**.

**Supplier Search and Request**

**Welcome Margaret Peck**

Your email address is recorded as Margaret.Peck@admin.cam.ac.uk and your telephone number as 66631. You can change these [here](#)

In the event of a query or assistance, please click on the white i in the blue square on the right

[Click here to display and manage your new suppliers](#)  
[Click here to display and manage your amendment and reactivation requests](#)

2. The screen below will then be displayed

**Welcome Oliver Harper**

If you have technical problems with this web application you can contact the software developer Chris Sendall by [email](#) or by phoning 39653.

Information: [ojh24](#) is permitted to create new record

Note that "lightyellow" lines are urgent

Search:

No	Name	Date	State
1	CAMBRIDGE TRAINING COMPANY PLC	22-Feb-2008 08:40	rejected 22-Feb-2008 09:43

[Click here](#) to return to supplier search and request  
[Click here](#) to display and manage your amendment and reactivation requests

### Re-submitting a rejected request

In the above example, the request to add Cambridge Training Company plc to the database has been rejected. This is detailed in the State column.

Rejected requests require you to either correct a mistake or provide further information.

**Welcome Oliver Harper**

If you have technical problems with this web application you can contact the software developer Chris Sendall by [email](#) or by phoning 39653.

Information: [ojh24](#) is permitted to create new record

Note that "lightyellow" lines are urgent

Search:

No	Name	Date	State
1	CAMBRIDGE TRAINING COMPANY PLC	22-Feb-2008 08:40	rejected 22-Feb-2008 09:43

[Click here](#) to return to supplier search and request  
[Click here](#) to display and manage your amendment and reactivation requests

Follow these steps to do this:

1. Click on the supplier name to view the request details.

**Welcome Oliver Harper**

If you have technical problems with this web application you can contact the software developer Chris Sendall by [email](#) or by phoning 39653.

Information: ojh24 is permitted to create new record  
 Information: CAMBRIDGE TRAINING COMPANY PLC is not a duplicate name  
 Information: Record has passed validation

Date	Event	By	To	Note
22-Feb-2008 09:43	rejected	ojh24 (Oliver Harper)		VAT number is not correct
22-Feb-2008 08:40	authorised	ojh24 (Oliver Harper)		

The note states that the VAT number is incorrect, therefore it must be changed and the request must be re-submitted.

2. Scroll down the page to find the field that you need to change. Additional documentation can also be attached if relevant.
3. Amend the information and click **Save**.

Fax number

Vat number  i

Tax code

4. Click **Authorise** and enter a comment to reflect what you have changed. In this example, a suitable comment would be "VAT number now corrected".

**Welcome Oliver Harper**

If you have technical problems with this web application you can contact the software developer Chris Sendall by [email](#) or by phoning 39653.

Information: ojh24 is permitted to create new record  
 Information: ojh24 is permitted to authorise new record

Authorise

Comment

5. Click **Authorise** to finish the process.