



# United States Department of the Interior

## BUREAU OF LAND MANAGEMENT

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November 26, 2003

In Reply Refer to:  
1510 (CA-944) I

**EMS TRANSMISSION: 11/26/03**

**Instruction Memorandum No. CA-2004-006**

Expires: 09/30/2005

To: CA All Employees

From: State Director

Subject: Interior Department Electronic Acquisition System (IDEAS)

Employees Impacted: Requisitioners, Program Leads, Admin. Officers, and Supervisors

The purpose of this memorandum is to provide a Standard Operating Procedure (SOP) for the use of IDEAS throughout California. This SOP is effective immediately.

California is following the Interior's established standard procedures as set forth in WO IM-99-135, Change 2, which mandates the use of IDEAS for all purchase requests (PR) (replaces requisitions).

The general guidance for using IDEAS is as follows:

- All purchase requests for: purchase orders, contracts, leases and agreements exceeding \$2,500 will be processed through IDEAS. The BLM Requisition Form 1510-18 *is no longer required or accepted.*
- Requirements below the \$2,500 threshold (\$2,000 construction) should be processed by the program office using the Government credit card. You are not required to enter these credit card transactions into IDEAS.
- Preparation of the electronic purchase request can be centralized in offices, but that determination will be up to each office. For the benefit of this SOP the preparation of the purchase request will be called the support function.
- Each office will be able to set up profiles for their IDEAS users. The available approval authorities are Supervisory, Budget, Property and IRM.

- Requisition logs or requisition numbering are no longer required.
- For specific guidance for preparation of a Purchase Request, see Attachment 1.

If you have questions regarding the IDEAS program or training, call Julia Lang, Procurement Analyst, at 916-978-4527 or Vandricia Razo, Contract Specialist, at 916-978-4322.

Signed by:  
James Wesley Abbott  
Associate State Director

Authenticated by:  
Richard A. Erickson  
Records Management

1 Attachment:  
PR GUIDANCE (3pp)

**PR GUIDANCE**

The specific guidance for preparation of a Purchase Request is as follows:

**Requisitioner Responsibilities:**

- Obtain approval from supervisor
- If the requirement is for Information Technology (IT), coordinate with IRM. The IRM staff will assist in preparing the Purchase Requisition with the appropriate configuration to ensure that it complies with current Bureau IRM policies.
- Have engineering review specification and drawings for construction projects
- If the requirement is property and there is uncertainty as to what Budget Object Class (BOC) to use, coordinate with the Property staff. The following BOCs apply to personal property:

<b><u>Budget Object Code</u></b>	<b><u>Definition</u></b>
<b><u>CAPITALIZED</u></b>	
311A	All personal property where the acquisition cost is equal to or greater than \$15,000 per item
311E	All information technology (IT) equipment where the acquisition cost is \$15,000 or above.
311D	All information technology (IT) software where the acquisition cost is equal to or greater than \$100,000 per item.
<b><u>NON-CAPITALIZED</u></b>	
312A	All personal property (does not include IT equipment) where the acquisition cost is from \$5,000 to \$14,999 per single item, or, Bureau sensitive items: firearms, global positioning systems (\$500 or greater), surveying equipment.
312E	All information technology (IT) personal property where the acquisition cost is from \$5,000 to \$14,999, or Bureau Sensitive: laptops, desktop, handheld radios, video systems.
<b><u>NON-FA BOCs</u></b>	
312B	All personal property where the acquisition cost is less than \$5,000, is not Bureau Sensitive, and is not entered into Fixed Assets.

- 312D All information technology (IT) software where the acquisition cost is less than \$100,000 and is not entered into Fixed Assets.
- 312F All information technology (IT) equipment where the acquisition cost is less than \$5,000 per single item, is not Bureau sensitive, and is not entered into Fixed Assets.
- Submit the following information to the office support person who will prepare the electronic purchase request:
    - Complete funding information, including the BOC
    - Source of supplies, if known
    - Description/Specifications of service or supply (if this is lengthy, a Word document can be created and attached to the electronic purchase request.)
    - Quantity
    - Unit of issue
    - Estimated unit price and total amount
    - Required delivery date
    - Any other pertinent information

**Support function responsibilities:**

- Prepare purchase request
- Prepare the required approval templates
  - Supervisory Approval
  - Budget, Review & Approval for all Purchase Requests
  - Property, Review & BOC Approval if requirement is for Property
  - Information Resources Management, Review & Approval if requirement is for IT
- Prepare the routing template in the following order:
  - Supervisory
  - If the requirement is for IT, route to IRM Team Cabinet
  - If the requirement is for property, route to Property Team Cabinet
  - Budget Team Cabinet.
- Last route is to Procurement, (this will be local Procurement Team Cabinet; CA-160 Bakersfield, CA-310 Nor Cal, CA-610 CDD or CA-944 SO)

**IRM responsibilities:**

- Review the Purchase Request make any necessary changes, approve and forward to the next cabinet on the routing template.

**Property responsibilities:**

- Review the Purchase Request, and then make any necessary changes, approve and forward to the next cabinet on the routing template.

**Budget responsibilities:**

- Review the Purchase Request make any necessary changes, approve and forward to the next cabinet on the routing template.

**Procurement responsibilities:**

- Review the Central Contractor Registration System (CCR), as contractors are required to be registered in CCR prior to an award.
- Entering/Making Changes To Vendors In IDEAS - Refer to the document "Instructions for Completing Vendor Information" (located on the National Acquisition Website @ <http://web.blm.gov/natacq/ideas>).
- Will not issue/release the award document until after it has been Validated, CO Approval and Finance Approval.
- FPDS IS NOT REQUIRED, SF-281 or SF-279 report

**For assistance, please call the following:**

- IDEAS desktop problems, call the BLM IDEAS help desk at 303-236-4176.
- Finance interface-related questions, call 303-236-4176.
- All other computer-type problems, call CASO help desk at 916-978-4560.
- For questions regarding the IDEAS program or training, call Julia Lang, Procurement Analyst, at 916-978-4527 or Vandricia Razo, Contract Specialist, at 916-978-4322.