Purchasing at Stevens Institute

Departmental User Lite

Related References:

- Requisitions (REQS) reference guide
- Receiving (RCV) reference guide
- Signing-Into *Kuali for Stevens* reference guide
- Web site address for *Kuali for Stevens* information:

Welcome!
This document is an introduction to the purchasing process at Stevens Institute. It will help you become familiar with the purchasing process at Stevens and introduce you to the language of purchasing and Kuali for Stevens.

Three Ways to purchase
At Stevens, there are three ways to purchase goods and services in support of the mission of the Institute.

1. Use a Stevens issued PCard (Procurement Card).
2. Fill out an electronic requisition (REQS e-doc) through Kuali for Stevens.
3. Shop the online catalogs of one of the ten vendors that participate in Steven$mart, the e procurement software for Stevens.

This document focuses on initiating an electronic requisition (REQS e-doc) through Kuali for Stevens and shopping the online catalogs using Steven$mart.
Delivery and Receiving at Stevens

An integral part of the procurement/purchasing process is delivery of the specified items ordered in satisfactory condition.

**Delivery** is the physical process of the items getting to your location.

1. Not all buildings on campus can have deliveries made to them directly from vendors.*
2. For those buildings that **CANNOT** have direct vendor deliver, the vendors deliver to Central Receiving at Howe.

**Receiving** has two meanings within the context of purchasing at Stevens.

1. *Central Receiving accepting delivery* for the campus buildings that cannot have delivery directly from vendors.*
2. **The process of indicating the delivered order’s completeness.**
   (Damaged goods, missing items, extra items can all be noted in the receiving process.)

* **Vendor Delivery Address**

These are the campus addresses to which a vendor can deliver.
The Howe Center is the delivery point (central receiving) for all buildings not listed.

<table>
<thead>
<tr>
<th>Building Name</th>
<th>Street Address</th>
<th>Building Code</th>
</tr>
</thead>
<tbody>
<tr>
<td>Howe</td>
<td>1 Castle Point</td>
<td>HOWE</td>
</tr>
<tr>
<td>EAS</td>
<td>24 5th St</td>
<td>EDWI</td>
</tr>
<tr>
<td>Carnegie</td>
<td>519 Hudson St</td>
<td>CARN</td>
</tr>
<tr>
<td>Lieb</td>
<td>531 Hudson St</td>
<td>LIEB</td>
</tr>
<tr>
<td>Burchard</td>
<td>524 River St</td>
<td>BURC</td>
</tr>
<tr>
<td>McLean</td>
<td>507 River St</td>
<td>MCLE</td>
</tr>
<tr>
<td>Babbio</td>
<td>525 River St</td>
<td>BABB</td>
</tr>
<tr>
<td>Morton</td>
<td>601 River St</td>
<td>MORT</td>
</tr>
<tr>
<td>Peirce</td>
<td>607 River St</td>
<td>PEIR</td>
</tr>
<tr>
<td>Kidde</td>
<td>615 River St</td>
<td>KIDD</td>
</tr>
<tr>
<td>Nicoll</td>
<td>621 River St</td>
<td>NICO</td>
</tr>
<tr>
<td>Davidson</td>
<td>707 Hudson St</td>
<td>DAVI</td>
</tr>
<tr>
<td>Griffith</td>
<td>600 Sinatra Dr</td>
<td>GRIF</td>
</tr>
</tbody>
</table>
Terminology
The following terms are used throughout Kuali for Stevens and Steven$mart. They are arranged here alphabetically for your reference.

**Accounting Line**: For a requisition, this is the string of codes that together indicate to what account items will be charged, what the items are and the associated dollar amount. Here are the required fields that comprise the accounting line.

- **Chart**: At Stevens our chart is SI.
- **Account**: These seven digits identify a pool of funds assigned to a specific university organization for a specific purpose. For example, the operating budget for the department of Mechanical Engineering, the revenue and expenses from operating the virtual wind tunnel, or the Class of 1945 Scholarship.
- **Object Code**: Four digit code categorizing the activity as a specific type of expense, example:
  - 6171...Supplies and Materials classroom
  - 6172... Supplies and Materials laboratory
  - 6174...Supplies and Materials office
- **Amount**: The dollar value associated with the transaction. For example, how much the supplies will cost.

**APO (Automatic Purchase Order)**: A requisition, totaling less than $5,000, where a commodity code does not apply, will become a purchase order and be sent directly to the vendor without going to the purchasing department, after the e-doc routes for all fiscal approvals.

**Commodity Code**: Certain items require special processing, handling and approval. For each there is a specific code. The item categories are:

- Code - Description
  - A - Animals
  - C - Chemicals
  - G - Gases
  - R - Radioactive
  - CAP - Capital Equipment

**Date Required**: When you will need the item(s) being purchased.

**P.O. (Purchase Order)** A written authorization for a vendor to ship goods or provide services based on conditions outlined in the document. The Purchase Order becomes a legally binding contract once the vendor accepts it. Unlike other KFS documents, the PO is not created by initiating and completing a blank document. Instead, the PO is generated from an approved Requisition when a contract manager is assigned by the purchasing office.
**Punching Out:** When you are leave the Steven$mart environment and enter the online shopping site to one of the approved vendors. At the time of this writing they are:

1. Staples
2. VWR International
3. W.W. Grainger, Inc.
4. Fisher Scientific
5. CDW G
6. Dell
7. Life Technologies
8. GovConnection
9. Sigma-Aldrich
10. Xerox
11. DigiKey
12. Mcmaster Carr
13. Newark
14. HP (Hewlett-Packard)

**Receiving:** There are two meanings within the context of purchasing at Stevens.

1. *Central Receiving accepting delivery* for the campus buildings that cannot have delivery directly from vendors. (See the Appendix for the list of buildings that can receive direct vendor delivery.)

2. *The process of indicating the delivered order’s completeness.* (Damaged goods, missing items, extra items can all be noted in the receiving process.) In *Kuali for Stevens*, this is the electronic process of acknowledging the receipt of an order. A Receiving e-doc (REC) is required of all items that fall into a Commodity Code or for requisitions totaling $5,000 or more.

**Requisition Number** is a KFS system assigned number, find it located at the top right of the e-doc, in the document header. KFS is the system of record at Stevens for all Requisitions. It is this Requisition number that will be referenced on the purchase order.

**Shopping Cart (or basket):** The place holder in any of the ten vendors’ shopping sites for the items you are purchasing through Steven$mart. It is important to remember that even though the process may appear seamless, the shopper is actually visiting three different sites: Kuali for Stevens, Steven$mart and the specific vendors’s site. The shopping cart is filled at the vendor’s site, submitted to the Steven$mart site and then returned to KFS. All the required vendor and item information along with certain user information is returned with the cart.

**Vendor:** The company/business/individual that will provide a service or product to Stevens. Ten specific vendors are identified through Steven$mart, but hundreds more are available.

**Documenting Routing and the Approval Process (Workflow)**
All e-docs are routed and tracked as they move through a predefined standard disbursement approval workflow path for review and approval. At Stevens one “best practice” workflow and approval will be used by all organizations for all disbursements including requisitions.

1. An initiator will complete an e-doc.
2. An organization administrator will review accounting information.
3. The account’s fiscal officer will review the document.
4. Any restricted items by either policy or regulation (commodity code items) will route to that responsible area for the appropriate review.
5. Depending on the amount of the requisition an organization level approval will review the document.
6. Contract or grant account activity must be reviewed by OSR.
7. The document will be processed by the Central Office.

**Document Status:**

Refers to the processing status of this e-doc

**APPROVED:** the e-doc has been through all levels of review and approval required. It is now a valid business transaction in accordance with Stevens’ policies. There may be outstanding acknowledgement requests. Approved e-docs are posted to the general ledger in the next run of the batch posting process, generally a nightly event.

**CANCELED:** the e-doc is denoted as void and should be disregarded. This status is applied to a document when an initiator creates an e-doc, but cancels it before submitting it for routing and approvals.

**DISAPPROVED:** the e-doc has been disapproved at some point in the review and approval process. All parties who have previously approved or initiated the e-doc will be notified.

**EN ROUTE:** the e-doc has been submitted and has pending approval requests.

**FINAL:** The e-doc has been through all levels of review and approval and has no acknowledgement requests.

**INITIATED:** the e-doc has been created, but not yet saved or submitted.

**SAVED:** the e-doc has not yet been submitted. The work has been saved and the document can be closed. A saved document can be retrieved for completion at a later date.

**Things you will need to know/consider before you prepare the requisition**

1. What is your budget for this purchase?
2. Do you know which vendor you want to use?
3. Should the vendor contact you with questions or someone else at Stevens?
4. Where will the item(s) be delivered?
5. Will receiving be required?
6. When will you need the materials?

Requisition (REQS) electronic document

The Requisition (REQS) e-doc is used to indicate items or services that need to be ordered through the Kuali for Stevens. It is the first step in the procurement process. The requisition collects information about the items or services the user wishes to have ordered, vendor (or possible vendors) to fulfill the order, delivery instructions, contact information and related accounting details.

When completing electronic requisition (REQS e-doc) through Kuali for Stevens, the user can:

1. Specify a Vendor,
2. Suggest a Vendor, or
3. Request Vendor Identification.

When Specifying a Vendor, the initiator must provide the quantity, item description, and unit cost when completing the required electronic requisition.

A purchase order will be created and transmitted to the vendor after approvals are complete.

If the requisition is less than $5,000, it becomes an APO (automatic purchase order) after approvals are completed and is then transmitted to the vendor.

If the requisition is in excess of $5,000, the Purchasing Office will manage it. This might include sourcing it (investigating possible vendors) and providing a contract manager who will create a PO (Purchase Order) based on the requisition.

When Suggesting a Vendor, or Requesting Vendor Identification the requisition initiator completes an electronic requisition by indicating a possible vendor or vendors, providing the quantity and item description. They do not have to provide a unit cost. It is recommended they provide the prospective budgeted amount for the item(s). The requisition will be assigned a contract manager by the purchasing department.