Purchasing using a Purchase Order through a Preferred Vendor

**Catalog/Non-Catalog**

### Identify Need

Need is identified for a good or service by an external company.

### Find Supplier

- **Catalog**
  - Requester receives request via email or verbally

- **Catalog**
  - Shopper locates item and creates cart; assigns cart to Requester

- **Non-Catalog**
  - Requester checks Preferred Vendor website for any vendor-specific ordering instructions

- **Catalog**
  - Requester initiates a REQuisition, selects items, creates a cart in iBuyNU and checks out

- **Catalog**
  - Requester initiates a catalog REQuisition in NUFinancials and retrieves cart in iBuyNU

- **Non-Catalog**
  - Requester creates a non-catalog REQuisition in NUFinancials (enters chart string; attaches any documentation (i.e. order form or quote); click Check Budget and submit REQ for approval)

  *Note: Check the appropriate Special Requisition box for Blankets, Subcontracts and Receive by Dollar Amount*

### Place & Approve Order

Complete REQuisition in NUFinancials (enter chart string, Check Budget, and Submit for Approval)

### Applicable Policy/Training Notes

- Financial Policies and Procedures
- Purchasing Resource Services
- Preferred Vendor website (Log in with your NetID and password)
- See the Purchasing Policy
- Finance, Facilities, and Research Administration Shopper and Requester Training
- Chart String Overview
- Identify Appropriate Chart String
- Item K (Special Requisition Types) in Purchasing Policy & Procedures
- Examples of when to use Receive By Dollar Amount
- Financial Policies and Procedures
- Purchasing Resource Services
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Catalog/Non-Catalog

**PLACE AND APPROVE ORDER**

- Approver(s) receive(s) email notification, review(s), approve(s) REQ in NUFinancials
  
  *Note: If non-catalog and $25,000 or more, PRS must approve*

- Restricted commodity? (identified by Account Code)
  
  - Automatically routes to Office for Research Safety for approval

- Sponsored chart string?
  
  - All sponsored project travel, equipment, consultants, sub-contract purchases, regardless of amount, go to ASRSP for approval
  
  - All purchases over $2,500 automatically go to ASRSP for approval
  
  - If you have subcontracts, contact ASRSP for special procedures and processing

- Purchase Order is automatically generated and sent to Vendor
  
  - Finance, Facilities, and Research Administration Training
    - Approvers Tab

  - Routes to Purchasing Resource Services (PRS) if over $25,000 even if Preferred Vendor (you can mark Preferred Vendor in comment field). No Sole Source Justification (SSJ) or Bid Documentation (BD-1) required.
  
  - Radioactive materials safety information
    - Office for Research Safety

  - Item M (Approvals/Workflow) in Purchasing Policy & Procedures

  - It’s very important to use the correct restricted commodity account. Mis-classification of expenses, especially restricted ones, may have serious consequences.

- ASRSP: Policies and procedures information
  
  - Office of Cost Studies

  - Research section of Policies website

  - Item M (Approvals/Workflow) in Purchasing Policy & Procedures

  - There are several resources for Sponsored project training; if you are new, your main resource is Research Administrator Training

  - Finance, Facilities, and Research Administration Training (Grants Tab)

- Purchase Order terms and conditions

  - Various methods are used to dispatch POs based on vendors’ profiles; they can be sent over fax, email or by electronic file transfer
## Purchasing using a Purchase Order through a Preferred Vendor

### Catalog/Non-Catalog

**Vendor delivers product or provides service**

**Is good/service satisfactory?**

- Contact vendor; if problem with resolution, contact PRS

**CONTACT ORDER**

- Invoice is sent to Accounts Payable

**Receive Order**

**CATALOG**

- Two-way match (PO, Invoice) occurs and voucher is created by Accounts Payable

**NON-CATALOG**

- Enter receipt in NUFinancials if over $500

**Pay for Order**

- Payment for NUFinancials Purchase Orders

- Payment for NUFinancials

- Finance, Facilities, and Research Administration Job Aid (Enter Receipts Using Manage Requisitions)

- No “receipt” needed for items under $500

- Finance, Facilities, and Research Administration Training (Budgeting Tab)

- Explanation of Match Exception

- Item O (Invoicing/Payment) in Purchasing Policy & Procedures

**Reconcile budget on a monthly basis.**

**Close Order, Inventory, Recycle**

- Item N (Receiving) in Purchasing Policy

- Finance, Facilities, and Research Administration Training

- Item O (Invoicing/Payment) in Purchasing Policy & Procedures

- Finance, Facilities, and Research Administration Training

- FMS723 Reconciling Budgets (Budgeting Tab)

- Process Map created in partnership between HR Learning & Organization Development, Financial Operations and Accounting Services, Purchasing Resource Services, Accounts Payable, and Accounting Services for Research and Sponsored Programs.

- Please share your feedback about this Process Map by completing a brief survey.

- Returns policy

- Finance, Facilities, and Research Administration Job Aid (Enter Receipts Using Manage Requisitions)

- Contact Accounting Services with questions about vendor payment methods

- Finance, Facilities, and Research Administration Training (Budgeting Tab)

- For subcontracts, a PO Change Order (POC) must be submitted even if the balance is zero

- ReQuisition and PO are closed automatically 15 days from payment/order completion

- For purchases of goods over $5000, follow inventory process

- Ready to dispose or recycle? Use the Equipment Inventory and Disposal form