

CCSE PURCHASING POLICY AND GUIDELINES

This document is a streamlined purchasing process to provide consistency and efficiency across the college. This exists in order to get your items to you as quickly as possible.



**KENNESAW STATE
UNIVERSITY**
COLLEGE OF COMPUTING AND
SOFTWARE ENGINEERING

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CCSE Purchasing Policy & Guidelines

The purchasing process for CCSE is subject to change. Requests to purchase items or services must follow purchasing procedures that are outlined by the University System of Georgia rules & regulations.

For the purpose of this document:

- **Requester** indicates the employee who will be using the requested items
- **Purchaser** indicates the department admin who will be processing the purchase request

Purchasing Process

Step 1

Requester submits purchasing request to the Department Chair for approval/denial.

Note: Speedchart, itemized list with quantities, and justification regarding need of purchase must be included when submitting request. An email request is required for documentation.

Step 2

Department Chair reviews the request and budget.
If funding source is the Dean's office, approval from the Dean (in writing) is required.
Department Chair returns approval/denial to **Requester**.

**Note: Start-up funds require both Chair and Dean approval.*

Step 3

If the purchase is approved, **Requester** obtains required documentation for purchase and submits to **Purchaser**.

All required documentation is listed in the Purchasing Guidelines for the **Requester**.

Step 4

Purchaser reviews submitted documentation for completeness.
If complete, continue. If not complete, return to **Requester**. **Requester** is responsible for completing any remaining required documentation as indicated by **Purchaser**.

Step 5

Purchaser obtains any additional approvals as required by the specific purchase request.
(UITS approval obtained by CCSE Lab Manager; to: Purchaser, cc: Business Manager)

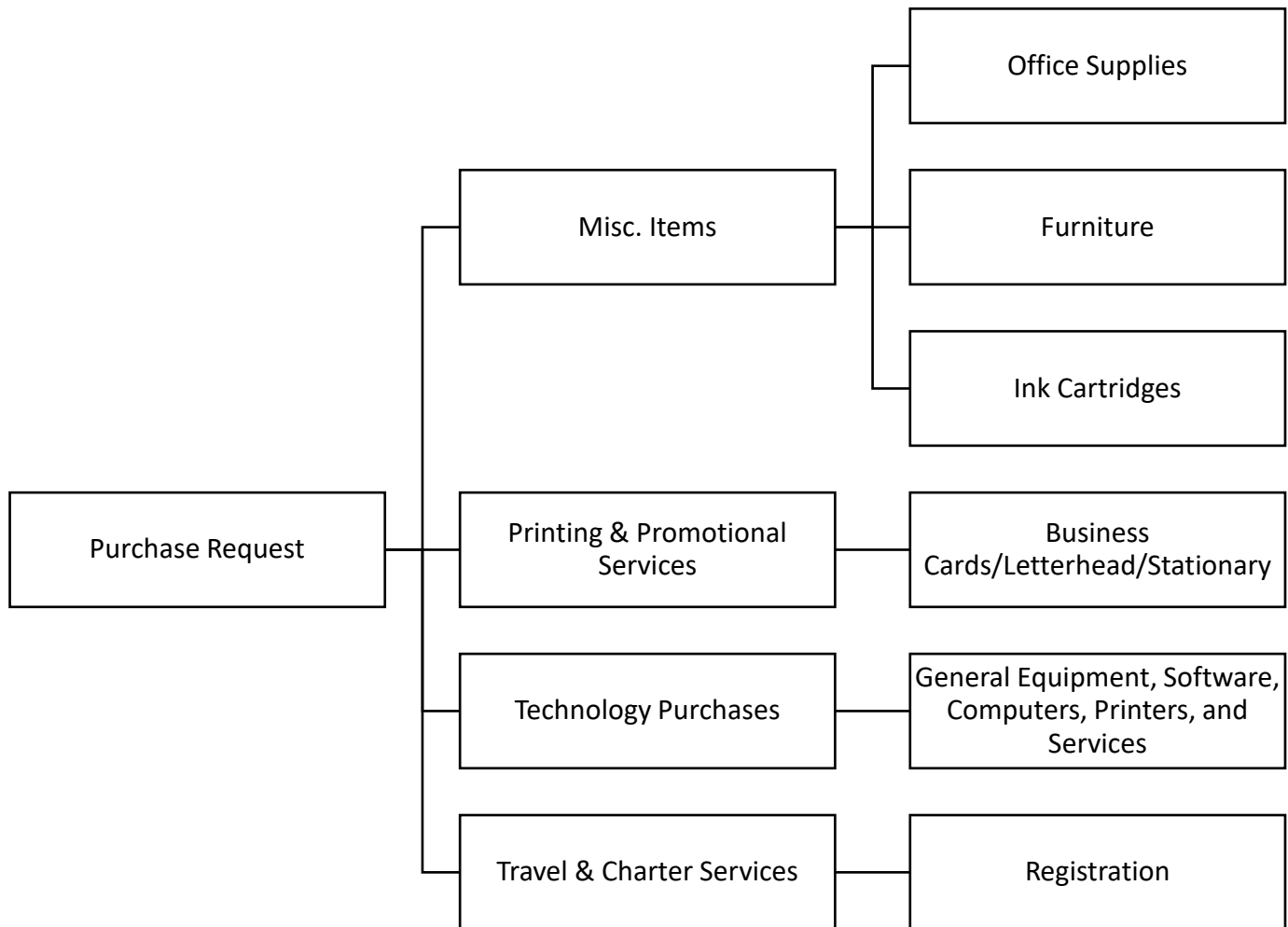
Note: Should the quote expire during this time it is the **Requester's responsibility to obtain an updated quote.*

Step 6

Purchaser processes purchase requests.

Purchase Classifications

The following chart shows which purchasing categories are outlined in this document.
(Each section outlines the required documentation needed to complete that purchase.)



Please contact your **Purchaser** for required documentation concerning the following:

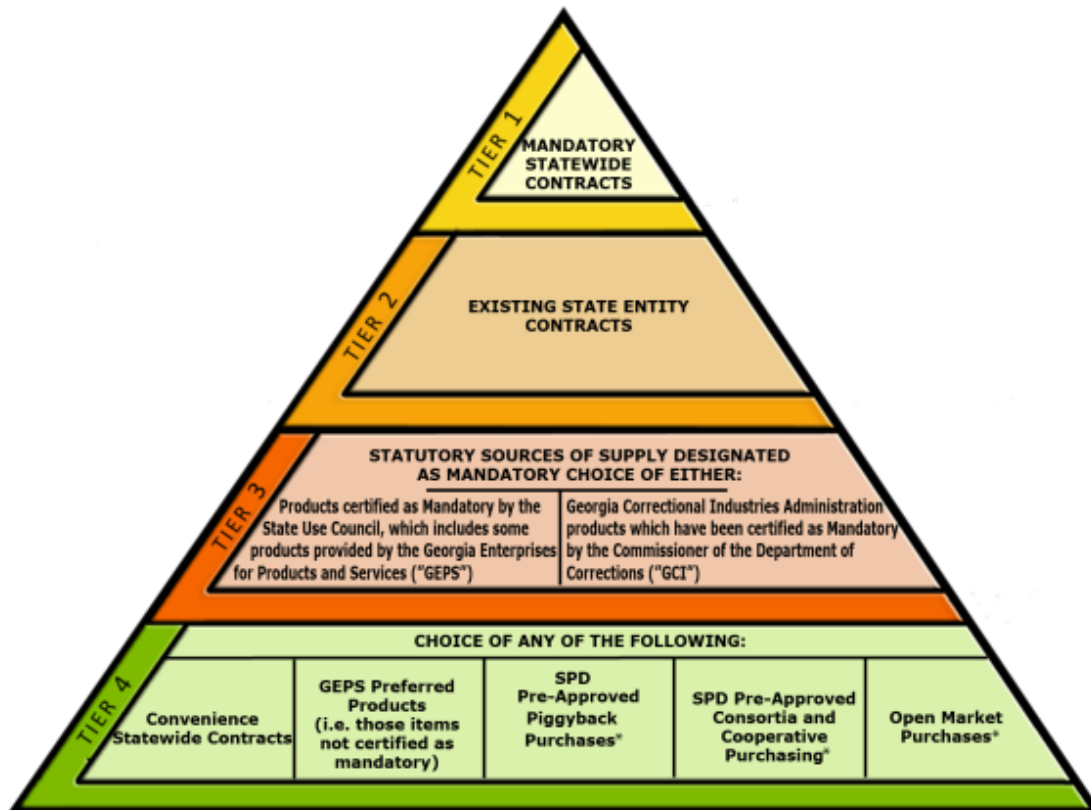
The following purchase requests are not currently included in these guidelines and may be subject to additional documentation guidelines and requirements.

These include, but are not limited to: contracts, food, lab supplies, advertising, printing services, promotional items, hiring a caterer/consultant/independent contractor/other professional/lecturer/skilled practitioner/temp, cell phone service, projector, booking a flight, buying a vehicle, renting a vehicle, chartering a bus, furniture.

Questions? Directory Information

	Name	Email	Phone
Travel questions?	Heather Mead	travel@kennesaw.edu	(470) 578-4394
Has my purchase been delivered?		centralrecanddistr@kennesaw.edu	(470) 578-3614
Questions regarding purchases and you don't know who to ask...		purchasing@kennesaw.edu	(470) 578-6214
Where's my purchase?	Keryn Marino	kmarino@kennesaw.edu	(470) 578-3134
Has my purchase been asset tagged?	Beth Krug	bkrug@kennesaw.edu	(470) 578-6620
Accounts Payable	Mary Smith	msmit364@kennesaw.edu	(470) 578-6017
I need help with a technology purchase...	CCSE Lab Manager: Kirk Inman	kinman2@kennesaw.edu	(470) 578-6653
Manufacturer's representative...	Division of Facilities Services	facilities@kennesaw.edu	(470) 578-6224
IT Admin	Demetria Wells	dwells17@kennesaw.edu	(470) 578-3803
CS Admin	Daphne Griffin	dgriff37@kennesaw.edu	(470) 578-6005
SWEGD Admin	Kyla Craven	kcraven9@kennesaw.edu	(470) 578-3790
CCSE Dean's Office Admin	Kathy Roddy	kroddy1@kennesaw.edu	(470) 578-3713

Order of Precedence for Purchases



Purchasing Guidelines for the **Requester**:

Misc. Items: Office Supplies

1. Follow Steps 1-3 of the [Purchasing Process](#)
2. Required documentation to be provided to **Purchaser** includes:
 - a. Documented approval from Department Chair
 - b. AS NEEDED, documented approval from Dean
 - c. AS NEEDED, documented approval from Grant Manager/PI
 - d. Supplier Information, including:
 - i. Supplier name
 - ii. [Order of Precedence](#) Tier level
 1. For most office supply purchases, the State of Georgia has a Statewide Convenience contract with **Staples**. The Staples punchout for searching contracted supplies is available in Team Georgia Marketplace.
 - iii. *Note: If multiple suppliers will be used, indicate each supplier per line item
 - e. Itemized request, including:
 - i. Item name
 - ii. Price per single line item
 - iii. Total quantity per line item
 - iv. Total price per line item
 - v. Total price per supplier
 - f. Quote, including:
 - i. This should be a pdf/screenshot of all requested items added into the cart using the Georgia First Marketplace located at the following link.
 1. <https://solutions.sciquest.com/apps/Router/Login?OrgName=Georgia>
 2. Username and Password are both "tgmguest".
 - g. Justification/reason for purchase request (what will the item(s) be used for?)
 - h. AS NEEDED, if the supplier is not set-up in the system the **Requester** will obtain the required completed vendor set-up forms, including:
 - i. <https://fiscalservices.kennesaw.edu/accounting/docs/Supplier%20Authorization%20Form.pdf>

Misc. Items: Furniture

1. Follow Steps 1-3 of the [Purchasing Process](#)
2. Required documentation to be provided to **Purchaser** includes:
 - a. Documented approval from Department Chair
 - b. AS NEEDED, documented approval from Dean
 - c. AS NEEDED, documented approval from Grant Manager/PI
 - d. Supplier Information, including:
 - i. Supplier name
 - ii. [Order of Precedence](#) Tier level
 1. Furniture purchases can only be made from Statewide Mandatory Contracts managed by the Department of Administrative Services (DOAS).
 2. For guidance in using the services of a manufacturer's representative, please contact the Division of Facilities Services via email (facilities@kennesaw.edu) or by phone (470-578-6224)

- iii. *Note: If multiple suppliers will be used, indicate each supplier per line item
- e. Itemized request, including:
 - i. Item name
 - ii. Price per single line item
 - iii. Total quantity per line item
 - iv. Total price per line item
 - v. Total price per supplier
- f. Quote, including:
 - i. This can be a pdf/screenshot of all requested items added into the cart or an official quote from the supplier.
 - ii. Concerning State Approved Vendors, use the Georgia First Marketplace located at the following link.
 - 1. <https://solutions.sciquest.com/apps/Router/Login?OrgName=Georgia>
 - 2. Username and Password are both "tgmguest".
- g. Justification/reason for purchase request (what will the item(s) be used for?)
- h. AS NEEDED, if the supplier is not set-up in the system the **Requester** will obtain the required completed vendor set-up forms, including:
 - i. <https://fiscalservices.kennesaw.edu/accounting/docs/Supplier%20Authorization%20Form.pdf>

Misc. Items: Ink Cartridges

- 1. Follow Steps 1-3 of the [Purchasing Process](#)
- 2. Required documentation to be provided to **Purchaser** includes:
 - a. Documented approval from Department Chair
 - b. AS NEEDED, documented approval from Dean
 - c. AS NEEDED, documented approval from Grant Manager/PI
 - d. Ink cartridges must be purchased through HP or Staples, whichever is cheaper.
 - i. Supply a price comparison for HP vs Staples through the Georgia First Marketplace located at the following link.
 - ii. <https://solutions.sciquest.com/apps/Router/Login?OrgName=Georgia>
 - iii. Username and Password are both "tgmguest".
- e. Supplier Information, including:
 - i. Supplier name
 - ii. [Order of Precedence](#) Tier level
 - iii. *Note: If multiple suppliers will be used, indicate each supplier per line item
- f. Itemized request, including:
 - i. Item name
 - ii. Price per single line item
 - iii. Total quantity per line item
 - iv. Total price per line item
 - v. Total price per supplier
- g. Quote, including:
 - i. This should be a pdf/screenshot of all requested items added into the cart using the Georgia First Marketplace located at the following link.
 - ii. <https://solutions.sciquest.com/apps/Router/Login?OrgName=Georgia>
 - iii. Username and Password are both "tgmguest".
- h. Justification/reason for purchase request (what will the item(s) be used for?)

- i. AS NEEDED, if the supplier is not set-up in the system the **Requester** will obtain the required completed vendor set-up forms, including:
 - i. <https://fiscalservices.kennesaw.edu/accounting/docs/Supplier%20Authorization%20Form.pdf>

Printing & Promotional Services: Business Cards/Letterhead/Stationary

1. Follow Steps 1-3 of the [Purchasing Process](#)
2. Required documentation to be provided to **Purchaser** includes:
 - a. Documented approval from Department Chair
 - b. AS NEEDED, documented approval from Dean
 - c. AS NEEDED, documented approval from Grant Manager/PI
 - d. Justification/reason for purchase request (what will the item(s) be used for?)
 - e. Name
 - f. Degrees you would like listed
 - g. Title (can be found in KSU's online directory) or group information
 - h. If the request is not for your personal business card, please include the website address you want included on your card
 - i. Room number
 - j. Mail drop number
 - k. Phone number
 - l. Email prefix (to be followed by @kennesaw.edu)
3. *Note: Official KSU templates will be used for all requests.
 - a. All printing requests are subject to the approval of the Office of Strategic Communications and Marketing. For templated items, some information may not be included due to established guidelines.

Technology Purchases: General Equipment, Software, Computers, Printers, and Services

1. **Requester** Follow Steps 1-3 of the [Purchasing Process](#)
2. Required documentation to be provided to **Purchaser** includes:
 - a. Documented approval from Department Chair
 - b. AS NEEDED, documented approval from Dean
 - c. AS NEEDED, documented approval from Grant Manager/PI
 - d. Description of intended use
 - e. Justification of business purpose
 - f. Purchasing Details:
 - i. If the requested item(s), or a comparable version of the item(s), are available on a Statewide Mandatory Contract, then the contracted supplier **MUST** be used.
 - ii. If there is no contracted supplier that has the requested or comparable item(s), other suppliers may be used.
 1. In this case, suppliers must be set-up in our system as vendors. The **Requester** must have the supplier complete the following vendor registration process:
<https://fiscalservices.kennesaw.edu/procurement/supplier-vendor-info.php>
 - a. By completing the registration form and conducting business with KSU they should be informed of and agree to KSU procurement policies and procedures:

- i. <https://fiscalservices.kennesaw.edu/procurement/supplier-vendor-info.php>
 - 2. The Supplier/Vendor ID should be given by the **Requester** to the **Purchaser** before purchasing occurs.
 - 3. By completing the registration form and conducting business with KSU
- iii. Supplier Information, including:
 - 1. Supplier name
 - 2. [Order of Precedence](#) Tier level
 - 3. *Note: If multiple suppliers will be used, indicate each supplier per line item
- iv. Itemized request, including:
 - 1. Item name
 - 2. Price per single line item
 - 3. Total quantity per line item
 - 4. Total price per line item
 - 5. Total price per supplier
- v. Quote, including:
 - 1. This can be a pdf/screenshot of all requested items added into the cart or an official quote from the supplier.
 - 2. Concerning State Approved Vendors, use the Georgia First Marketplace located at the following link.
 - 3. <https://solutions.sciquest.com/apps/Router/Login?OrgName=Georgia>
 - 4. Username and Password are both "tgmguest".
- ii. AS NEEDED, competitive bidding documentation OR documentation supporting Sole Source/Brand (see [Sourcing & Bidding](#))
- g. *Note: Per previous communication, items to be used in conjunction with technology items require UITS approval which will be obtained by the **Purchaser** through the Lab Manager; this includes purchases for: dell & mac desktops & laptops, printers, PDAs, storage devices (including external hard drives), monitors, monitor mounts, screen covers, scanners, keyboards, mouse, pc speakers, remote presenter tools, etc....

Travel & Charter Services: Registration

- 1. Follow Steps 1-3 of the [Purchasing Process](#)
- 2. Required documentation to be provided to **Purchaser** includes:
 - a. Documented approval from Department Chair
 - b. AS NEEDED, documented approval from Dean
 - c. AS NEEDED, documented approval from Grant Manager/PI
 - d. Link to registration page
 - e. Dates of Event/conference
 - f. Total cost of event/conference purchase
 - g. PDF/screenshot of event/conference agenda
 - h. Quote:
 - i. This can be a pdf/screenshot of the registration page with the price indicated.
 - i. Memberships:
 - i. If the cost difference in having a membership warrants a membership purchase, complete the following membership form and attach needed documentation.
 - ii. <https://fiscalservices.kennesaw.edu/ap/docs/MEMBERSHIP%20FORM.pdf>
 - j. Justification/reason for purchase request (what will the item(s) be used for?)

3. **Purchaser** will schedule in-person appointment with **Requester** once all documentation has been received, reviewed, and marked as ready for purchasing.
4. **Requester** will complete all required information fields, except for the payment details, prior to scheduled appointment.
5. **Purchaser** will review purchase details and complete all payment details at the scheduled location of the **Purchaser's** choosing, then submit the purchase request.
6. **Requester** is responsible for sending confirmation details to **Purchaser** via email immediately following purchase completion.

Sourcing & Bidding for Purchases

1. After the **Purchaser** has submitted the requisition, the Buyer Partner will review the purchase.
 - If the purchase is between \$10,000 - \$24,999:
 - AND not on contract: two additional quotes will be needed
 - **Requester** will provide these additional quotes for comparison to **Purchaser** prior to purchase
 - If there is no other comparable item available at another vendor, then a Sole Source/Sole Brand Justification needs to be completed (*see below*).
 - AND on contract: The Buyer Partner will proceed
 - If the purchase is \$25,000 or more:
 - AND not on contract: a formal solicitation must be placed on the Georgia Procurement Registry for bidding
 - If the vendor is newly established, the **Office of Procurement** can provide the vendor guidance for this setup:
<https://fiscalservices.kennesaw.edu/procurement/supplier-vendor-info.php>
 - AND on contract: The Buyer Partner will proceed
2. A **Sole Source** (SS) exists when only one vendor can provide a good or a service.
 - If a purchase is a Sole Source, the **Requester** should provide a completed Sole Source Justification form with supporting documentation to the **Purchaser** along with all other required documentation prior to purchase.
3. A **Sole Brand** (SB) exists when only one brand of an item will meet KSU's needs. For example, we could buy many brands of printers. However, if someone on campus specifically needs a Hewlett-Packard (HP) printer, then HP would be a SB.
 - If a purchase is a Sole Brand, the **Requester** should provide a completed Sole Brand Justification form with supporting documentation to the **Purchaser** along with all other required documentation prior to purchase.