

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**.

Step 3

Requester obtains required documentation for purchase and submits to **Purchaser**.
(UITS approval obtained by **Requester**; to: **Purchaser**, cc: Business Manager)

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

All required documentation are listed in the Purchasing Guidelines for the **Requester**
[Link to UITS request form](#)

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

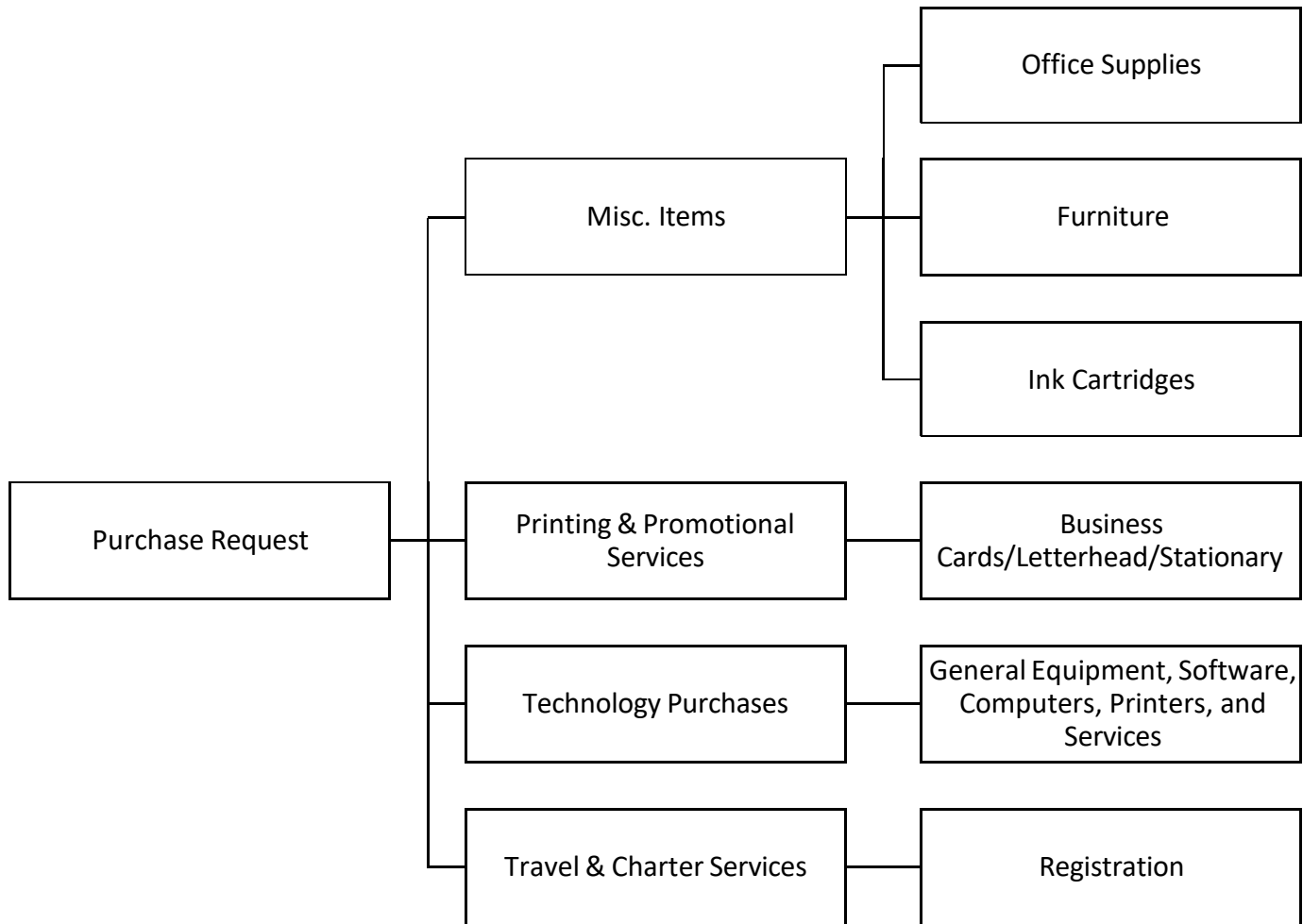
Purchaser obtains any additional approvals as required by the specific purchase request.

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:

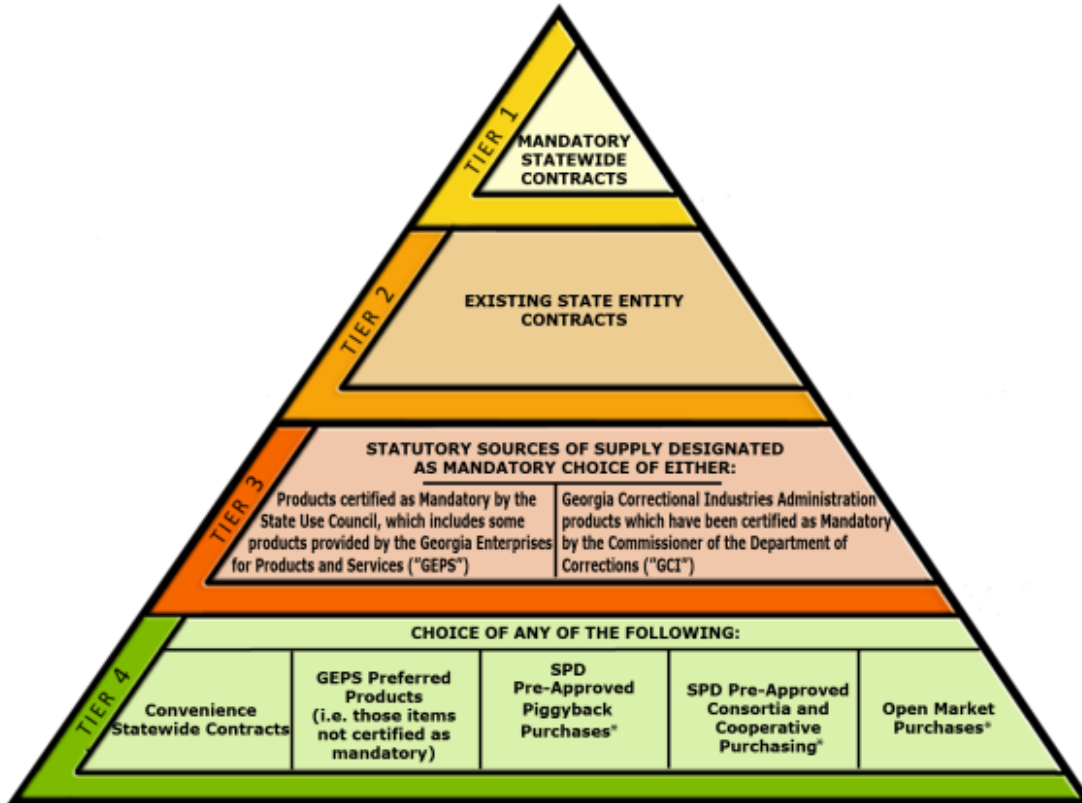
The following purchase requests are not currently included in these guidelines and may be subject to additional documentation guidelines and requirements.

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?	Anthony Bolar	abolar1@kennesaw.edu	(470) 578-6979
Has my purchase been asset tagged?	Beth Krug	bkrug@kennesaw.edu	(470) 578-6620
Accounts Payable	Lidia Morris	lmorri86@kennesaw.edu	(470) 578-4875
I need help with a technology purchase...	CCSE Lab Manager: Christine Bryant	cbryan78@kennesaw.edu	(470) 578-6653
Manufacturer's representative...	Div. of Facilities Services	facilities@kennesaw.edu	(470) 578-6224
IT Admin	Judith Brodell	jbrodell@kennesaw.edu	(470) 578-3803
CS Admin	Farah Bahreini-Esfahanin	fbahrein@kennesaw.edu	(470) 578-6005
SWEGD Admin	Lisa Johnson	ljohn419@kennesaw.edu	(470) 578-3790
SDSA Admin	Leann Levelsmier	lhaman1@kennesaw.edu	(470) 578-2409
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.scquest.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.scquest.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".
- vi. AS NEEDED, competitive bidding documentation OR documentation supporting Sole Source/Brand (see [Sourcing & Bidding](#))
- g. Items to be used in conjunction with technology items require UITS approval which will be obtained by the **Purchaser** through the **Requester**; this includes purchases for: all electronic equipment.
 - i. Self service is available for employees to obtain new computer technology in our "Service Catalog" under the category "IT Equipment Services".
 - ii. Please check our "Standard IT Equipment" in our "Product Catalog" first to see if what you need is available.
 - iii. To receive an approved quote, follow these steps:
 1. Go to service.kennesaw.edu.
 2. Select "Technology"
 3. Select "Service Request"
 4. Select "Service Catalog" under Catalogs
 5. Select "Get a Quote for IT Assets" under the category "IT Equipment Services"
 - iv. Once you have completed the request, a representative of UITS will contact you with questions (as needed) to prepare a quote for you. UITS will provide the quote and a "UITs Approval".

Travel & Charter Services: Registration

1. Follow Steps 1-3 of the [Purchasing Process](#) OR pay out of pocket and request reimbursement through Concur.
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 a brief 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 Procurement Specialist 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 Procurement Specialist 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 Procurement Specialist 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.

Vendor/Supplier Contacts

	Name	Email
Computer/tech items	James Hillebrand	jamehil@cdwg.com
Computer/VR/tech items	Covy Phelps	covy.phelps@scw.com
Computer/VR/tech items	Taryn Bell	taryn.bell@scw.com
Furniture	Mark Camp	mark@usadvantage.net
Dell	Andrew Langsdon	andrew_langsdon@Dell.com

Is this item sold by an approved vendor?

To find out whether an item is sold by an approved vendor, please login to the Georgia First Marketplace located at the following link: <https://solutions.sciquest.com/apps/Router/Login?OrgName=Georgia> (Username and Password are both "tgmguest").

To search for an item use the search box in the "Shop From the Top" section. To browse through suppliers/vendors, select "Suppliers" in the "Shop From the Top" section and browse alphabetically.

Please note: sometimes the system may not show all approved items/suppliers/vendors. Please try using varying search criteria.

Tip: if the item does not appear in the Georgia First Marketplace, use the Vendor/Supplier Contact information provided in the previous section to contact our most commonly used vendors and ask if they have the requested item.

Year End Deadlines

<https://fiscalservices.kennesaw.edu/procurement>

5/2/23, Tuesday Procurement	<ul style="list-style-type: none">• Last day to submit requisitions for \$24,999.99 or less using college or department operating budgets.• From 5/2/23 to 6/1/23, requisitions may be submitted through Marketplace.• New purchases after this date will be for One-Time funded projects only, <u>not college or department operating budgets</u>.
Vendor Registration	<ul style="list-style-type: none">• FY 23 SHARE supplier packets related to ePro requisitions due to KSU Vendor Registration. This allows the supplier packets processed by the University System of Georgia to meet the fiscal year-end deadline for any requisitions issued to new suppliers.• <i>Please note that we will still accept packets submitted after this date, but the packets are not guaranteed to be fully processed in time to meet the year-end deadlines.</i>

Note: Not all Marketplace Vendors can be used to purchase in the Marketplace. It's important to complete major purchases before the 05/02 deadline. These include but not limited to; computers, equipment, furniture, purchases over \$2500.00, items that require inventory tagging, etc.