Purchasing 101

Each team has two designated accounts:

Operations Account – E203XXX Used for funding that does not originate as a donation or gift.	Gift Account – E208XXX Used to accept non-taxable gifts/donations. Teams should always spend from this account **first**!

If you're unsure of your team account numbers, check the Master List of Team Account Numbers.

Teams have 3 primary options for purchasing.
All three methods deduct funds from the team accounts.

eShop	I Want Doc	P-Card
An online portal with access to multiple Cornell-approved vendors, including Amazon. This is the simplest way to order items for your team and should be your first stop. If an item on Amazon is listed as "restricted", it means it is available from another eShop vendor. Only students who have Cornell Workday accounts are eligible to become e-shop users.	An e-document requesting that the BSC execute a purchase on behalf of a team. I Want Documents should be used for items that are not in eShop and cost more than the allowable P-Card limit of $500 per transaction. I Want Docs are also used for personal reimbursements. The I Want Document process involves several steps, which are outlined below.	A Visa credit card that can be used to purchase items online or in-person through vendors that do not appear in e-Shop. A p-card purchase deducts funds directly from the team account. P-cards *cannot* be used for any travel-related expenses. Teams may designate one P-card holder. The application process is outlined below.

Institutional purchasing is much different than personal purchasing and often involves several steps and approvals. The College of Engineering Business Service Center team process hundreds of transactions a day. Completing purchasing requests accurately allows them to place orders as quickly as possible. **Please ensure that you're familiar with the proper procedures for the above resources by fully reviewing the Team Leads Canvas module on Business Operations and associated tutorials**.

After reviewing the Canvas content, if you still have questions, don't hesitate to reach out for support using the following contact info:

1. eng_projectteams@cornell.edu - Questions regarding specific purchasing methods will be forwarded to Gibran El-Sulayman and questions regarding general business operations and team accounts will be forwarded to Kate Reiter.
2. ftccoecis@cornell.edu – Emails sent to this address will be directed to the appropriate person at the Business Service Center (BSC).

CornellEngineering
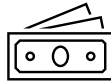Student Project Teams
Questions? Email us! Eng_projectteams@cornell.edu

Student Project Teams QuickStart Guide Series
Purchasing

The following information addresses frequently asked questions and issues that students encounter when navigating institutional purchasing. This information is *not comprehensive* and is meant to supplement the primary resources found on the Team Leads Canvas course.

Process for I Want Document Purchases

I Want Doc Prepared by student

- The document is prepared and submitted by student on behalf of the Project Team and then sent to multiple approvers who verify the validity of the request as well as account information.
- Default settings:
- College/division = IT-2300 - Engineering
- Department unit = 2335 - Undergraduate Programs

*Order placed by the Business Service Center (BSC)

- If vendor accepts credit cards, the BSC will place the order directly.
- If vendor doesn't accept credit cards, the BSC will issue a Purchase Order (PO) as confirmation of payment.
- If the vendor doesn't accept credit cards and requires advance payment, an invoice must be sent from the vendor to Cornell before the payment will be issued.

Order status added to the bottom of the I Want Doc

- "Purchased with a Credit Card" indicates the item has been purchased and should be shipped ASAP.
- A PO# indicates confirmation that payment has been finalized. Note that Cornell operates on a Net 30-45 purchasing cycle, which means that vendors may not receive their payment several weeks.

*If a team chooses to order from a new vendor that is not yet set up in Cornell's system, the vendor must accept an email invitation to register with Cornell. If there is a delay in purchasing, students should check to ensure that the vendor has received the email and completed this step.

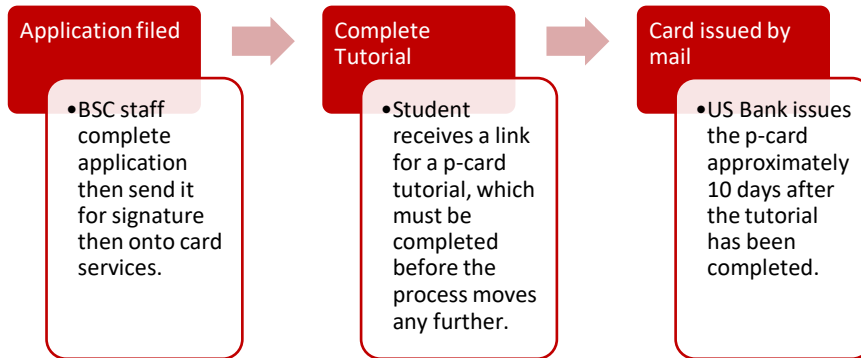## I Want Documents for Reimbursements

For personal reimbursements, the I Want Doc must include an attached Proof of Purchase (order confirmation is not sufficient, you must include a receipt that *confirms* payment) and be submitted within 30 days of the purchase. All I Want Doc **attachments must be in the form of a pdf**! It typically takes about 2 weeks for a check to be issued and received in the mail.

Process for P-card Applications

Application filed		Complete Tutorial		Card issued by mail
•BSC staff complete application then send it for signature then onto card services.	→	•Student receives a link for a p-card tutorial, which must be completed before the process moves any further.	→	•US Bank issues the p-card approximately 10 days after the tutorial has been completed.

Once a P-card is received it can be used with the following limitations:

1. A single purchase may not exceed $500. Receipts may not be split into two smaller purchases.
2. Teams may use their P-card for a maximum of $5000 worth of purchases in a month.
3. The $500/transaction and $5,000/month amounts are *limits*, not pre-loaded funds! All funds come from the team account balance.
4. Once a P-card has been used for a purchase, a receipt must be submitted in a timely manner. Students who do not submit receipts as required will have their P-card canceled.