



# PURCHASING 101

Tips and Tricks for Your  
Purchasing Toolbox



# WELCOME

Purchasing works to procure the best products and services for K-State.

Our services are available to you whenever you need them.

- Purchases
- Leases
- Contracts

We are here to help!

# Where to Buy

- Contracts [www.k-state.edu/finsvcs/purchasing/contract.html](http://www.k-state.edu/finsvcs/purchasing/contract.html)
- State Use Catalog
- Facilities and University Printing/Copying Services
- KSU Departments/State Agencies
- Direct Buy Authority up to \$10,000 (total cost commitment)
- Special Authority
- State of Kansas Procurement & Contracts

# Purchasing Website



[Browse A-Z](#) [Sign in ▼](#)

[K-State home](#) » [Division of Financial Services](#) » [Purchasing](#)

## Division of Financial Services



<a href="#">Financial Services Home</a>	<p>Kansas State University Purchasing Office's mission is to support and facilitate the instructional, research, and public service missions of the University by applying the best methods and best business practices when K-State is acquiring supplies, materials, equipment, goods, property, printing, services, and leases of real property. Within the context of the K-State environment, Purchasing will promote the development and use of purchasing processes that, in turn, promote the pursuit of excellence and the best interests of K-State while maintaining the highest possible integrity, broad based competition, fair and equal treatment of the business community, and increased economies &amp; efficiencies in the purchasing process. K-State Purchasing communicates and collaborates with other state universities and the State of Kansas Procurement and Contracts office to insure that all procurement opportunities where mutual benefit can be obtained are achieved.</p>
<a href="#">Administration</a>	
<a href="#">Cashiers and Student Accounts</a>	
<a href="#">Financial Reporting</a>	
<a href="#">Fund Balancing</a>	
<a href="#">General Accounting</a>	

# Sources

## Division of Financial Services



### Financial Services Home

#### Administration

#### Cashiers and Student Accounts

#### Financial Reporting

#### Fund Balancing

#### General Accounting

#### Purchasing

##### Policies and Procedures

##### Sources/Contracts

##### Forms

##### Newsletter

##### Guidelines (PDF)

##### Training (PDF)

##### Vendor Information

##### Supplier Showcase

##### Solicitations

#### Sponsored Programs Accounting

#### Systems

#### Contact Us

#### Purchasing

Kansas State University  
Unger Complex  
2323 Anderson Ave.  
Suite 500  
Manhattan, KS 66502

785-532-6214

785-532-6577 fax

## Sources

Listed below are items currently on Kansas State University approved contracts or available from the State Use Catalog (Blind & Severely Disabled Made Products). These items are to be purchased from the appropriate sources, e.g. contract vendor, KSU department, or state agency. Purchases of contract items from sources other than these listed may become the personal responsibility of the individual authorizing the purchase. Information on any of the contract items are available in the KSU Purchasing Office, 2323 Anderson Ave., Suite 500, (785) 532-6214, [kspurch@k-state.edu](mailto:kspurch@k-state.edu).

Refer to [Policies and Procedures Manual](#) for information on the appropriate purchasing procedure for items not covered by established contracts.

### Required Purchases from State Use Vendors

**Envision:** Writing Utensils, Plastic Bags, Soaps & Sanitizers, Cleaning Towels, Biohazard Clean-Up Kits

**KETCH:** Air Filters, Safety Glasses, Safety Products

Items available directly from the vendors, the State Use website (<http://www.ksstateuse.org>) or the Staples Advantage website (<http://www.staplesadvantage.com>).

### Contracts (opens in a new window)

#### Other Sources

[K-State Software Licenses](#)

[State Use Catalog](#)

[Kansas Correctional Industries](#)

[K-State Surplus Property](#)

[State of Kansas Surplus Property](#)

[Federal Surplus Property](#)

[State of Kansas Procurement Contract List](#) (add SOK before the contract number when using on APVs)

Reminder: If you are installing modular furniture, buying carpet, painting, etc., you must work with Facilities. Contact Campus Planning at 785-532-6389 for assistance.


[Contracts \(opens in a new window\)](#)

# Purchasing Approved Contracts

- To access - Log in with your EID
- Search by contract number, vendor, or description

Contracts

Description	Number	Contract	Vendor	Exp Date
	KSU-1029	KSU-1029	MCGOOGAN LIBRARY OF MEDICINE	9/30/2018
	KSU-1037	KSU-1037	BIO TEK INSTRUMENTS INC	11/30/2018
	KSU-995	KSU-995	THE ADVISORY BOARD COMPANY	6/30/2019
	KSU-615	KSU-615	MICHAEL H MATHES	6/30/2019
outback replacement software	KSU-773	KSU-773	DECISIONS I I C	8/25/2018
16S antibiotic resistome sequencing analysis	KSU-905	KSU-905	DEFENSE FINANCE & ACCOUNTING	11/1/2021
25 Live scheduling software	KSU-924	KSU-924	COLLEGENET INC	1/31/2020
3 year Maintenance on Genius	KSU-864	KSU-864	PEAK SCIENTIFIC INC	2/8/2020
36 month lease for NeoPost mailing equip	KSU-936	KSU-936	NEOPOST USA INC	1/31/2020
4 year maint on digital radiograph	KSU-856	KSU-856	AGFA HEALTHCARE CORP	1/31/2020
4 year maint on Veradius	KSU-854	KSU-854	PHILIPS MEDICAL SYSTEMS	11/30/2019
5 year Maintenance agreement for Varian 2100 C/D	40609	40609	RS&A INC	8/31/2023



# State Use Vendors – Envision & KETCH

## **Required Purchases from State Use Vendors**

**Envision:** Writing Utensils, Plastic Bags, Soaps & Sanitizers, Cleaning Towels, Biohazard Clean-Up Kits

**KETCH:** Air Filters, Safety Glasses, Safety Products

Items available directly from the vendors, the State Use website (<http://www.ksstateuse.org>) or the Staples Advantage website (<http://www.staplesadvantage.com>).



# Campus Sources

## **Other Sources**

[K-State Software Licenses](#)

[State Use Catalog](#)

[Kansas Correctional Industries](#)

[K-State Surplus Property](#)

[State of Kansas Surplus Property](#)

[Federal Surplus Property](#)

[State of Kansas Procurement Contract List](#) (add SOK before the contract number when using on APVs)



# How to Buy

- Order Directly
  - IF buying from above Sources
  - IF less than \$10,000 (TOTAL COST COMMITMENT) in a year
- Use E-Forms to create Purchase Order

[Logout 6042](#)

## Create New Form

All  
Accounting  
Admin/Financial Reporting  
Cashiering  
Fixed Assets/Inventory  
**Purchasing**  
Spa  
Savable Forms

[Search Existing Forms](#)

## Description

[Purchase Cover Sheet](#)

[Purchase Order](#)

[Purchase Requisition](#)

[Sales and Use Tax Kansas Exemption Certificate](#)

## Vendor Information

## Department Information

## Shipping Address

## Billing Address

## Order Information

Contract / PO Number

## Provide details

Signature

Department authorized  
signatory

KANSAS STATE UNIVERSITY PURCHASE ORDER														
PO Number:										Document No. 1858636 R 2				
Document Date: 10/12/2018				Modified Date: 10/12/2018 9:45:23 AM				Order Date: 10/12/2018						
Vendor Information  No/Size								Paying Agency KANSAS STATE UNIVERSITY  Department:  Contact: Billing Address: Phone: ( )						
Out of Balance														
sfcs	opt	Fund	FF	Wdgd	Unit	SL	Program	Acct	Amount	Project	Award	Bron	Org	Object
01														
02														
03														
04														
05														
06														
07														
08														
Purchase/Req.				Terms		FOB		Contract		Delivery Date		Document Total 0.00		
Quantity		Unit		Description of Material							Unit Price		Amount	
										Doc. Total		0.00		
DEPARTMENT PURCHASE/PAYMENT CERTIFICATION This document represents a purchase order of the State of Kansas for the material or service described above. Please deliver the items or perform the service in accordance with the terms contained above. I certify that sufficient funds are available.										NOTE: A current copy of the vendor's IRS Form W-9 must be on file at Kansas State University in order for payment to be made. It is the vendor's responsibility to provide the form.				
Department Authorized Signature										Date				
NOTICE TO VENDOR: By acceptance of this purchase order, you agree to abide by the provisions of I.S.S. 44-1507. This purchase order is also exempt from taxes as noted in the Exemption Certificate.														
EXEMPTION CERTIFICATE: The items included on the purchase order are for the exclusive use of the State of Kansas and are exempt from Federal excise taxes under IRS Statute 4561-p-2 and from Kansas sales tax under KSA 78-3606-c, i.e. exemption KSB1444718														



# Competitive Bid Process

- **Competitive Bids Required**

- IF \$10,000 or more and not available through approved Sources
- IF supplier says they are on contract and you cannot find them on the approved list – **Call Purchasing**
- All purchase commitments regardless of funding source

- **Competitive Bids Options**

- Request for Quotation
- Invitation for Bid/Request for Proposal
- Request for Proposal – Negotiated bids

# Electronic Purchase Requisition

- Begin Here

[Logout 6042](#)

**Create New Form**

- All
- Accounting
- Admin/Financial Reporting
- Cashiering
- Fixed Assets/Inventory
- Purchasing**
- Spa
- Savable Forms

[Search Existing Forms](#)

[Form Status](#)

[Document Tracking](#)


[Vendor Search](#)

[Main Menu](#)

[My Account](#)

[Changelog](#)

[Support](#)



## eForms

K-State Division of Financial Services

Welcome back, Cathy Oehm.  
Asst Dir of Purchasing, Division of Financial Services

**Documents that you created**

**New Documents (9)**

# Electronic Purchase Requisition

- Access to EPR

[Logout 6042](#)

## Create New Form

All  
Accounting  
Admin/Financial Reporting  
Cashiering  
Fixed Assets/Inventory  
**Purchasing**  
Spa  
Savable Forms

[Search Existing Forms](#)

## Description

[Purchase Cover Sheet](#)

[Purchase Order](#)

[Purchase Requisition](#)

[Sales and Use Tax Kansas Exemption Certificate](#)



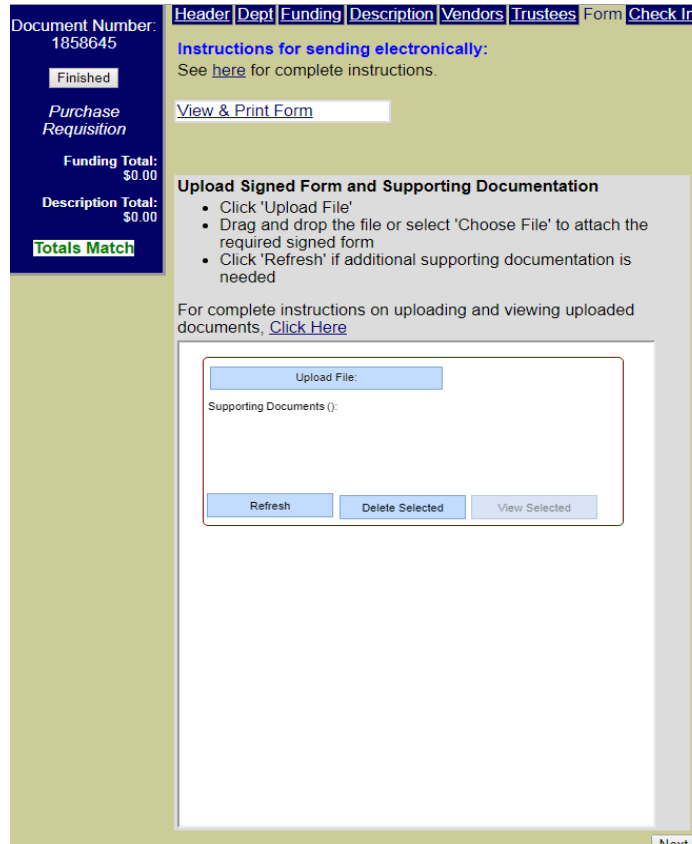
# Electronic Purchase Requisition

## Information Needed

- Complete description
- Specifications
- Who? What? When? Where?
- Shipping costs, if any
- Other information you want Purchasing to know



# Upload Signed Purchase Requisition and Specifications



The screenshot shows a web application interface for uploading a signed purchase requisition. On the left, a dark blue sidebar contains the document number '1858645', a 'Finished' button, the title 'Purchase Requisition', funding and description totals of '\$0.00', and a green 'Totals Match' status. The top navigation bar includes links for 'Header', 'Dept', 'Funding', 'Description', 'Vendors', 'Trustees', 'Form', and 'Check In'. The main content area has a heading 'Instructions for sending electronically:' with a link to 'here' for more details. Below this is a 'View & Print Form' button. A section titled 'Upload Signed Form and Supporting Documentation' provides a bulleted list of steps: clicking 'Upload File', dragging and dropping the file or selecting 'Choose File', and clicking 'Refresh' for additional documentation. A link 'Click Here' provides instructions on uploading and viewing documents. The bottom section contains an 'Upload File:' button, a label 'Supporting Documents ():', and three buttons: 'Refresh', 'Delete Selected', and 'View Selected'. A 'Next' button is visible at the bottom right of the interface.

Document Number: 1858645

Finished

Purchase Requisition

Funding Total: \$0.00

Description Total: \$0.00

Totals Match

Header | Dept | Funding | Description | Vendors | Trustees | Form | Check In

Instructions for sending electronically:  
See [here](#) for complete instructions.

[View & Print Form](#)

**Upload Signed Form and Supporting Documentation**

- Click 'Upload File'
- Drag and drop the file or select 'Choose File' to attach the required signed form
- Click 'Refresh' if additional supporting documentation is needed

For complete instructions on uploading and viewing uploaded documents, [Click Here](#)

Upload File:

Supporting Documents ():

Refresh Delete Selected View Selected

Next





# Tips for Local Purchases under \$10,000

## Best Practices

- **Trust but Verify** – check approved contracts list, if not listed contact Purchasing
- Obtain pricing before creating a purchase order, collect quotes
- ASK about discounts
  - If buying 5 or more items
  - Or spending \$5000 or more
- Include Freight get a “not to exceed” (NTE) quote
- **Do Not** pay for orders in advance
- Contact Purchasing before repetitive purchases are made, a contract may be appropriate and efficient.




# Tips for Local Purchases

- Work with your end user to determine the need
- Identify potential sources
- Collect informal quotes
- Consider total cost of ownership - (purchase price, freight/handling fees, etc.)
- Receive order - Immediately inspect the order
- Invoicing & Payment - (Is the invoice correct?)
- Contact Purchasing if you have any questions or need guidance

# Purchasing Forms

Website - [www.k-state.edu/finsvcs/purchasing/forms.html](http://www.k-state.edu/finsvcs/purchasing/forms.html)

## Division of Financial Services



Financial Services Home	<b>Purchasing Forms</b>
Administration	<a href="#">Automobile Accident Report</a>
Cashiers and Student Accounts	<a href="#">Complaint to Vendor</a>
Financial Reporting	<a href="#">Contract - Lecturers, Speakers, or Entertainers</a>
Fund Balancing	<a href="#">Contract - Memorandum of Agreement</a>
General Accounting	<a href="#">Contractual Provisions Attachment, KSU-146a</a>
<b>Purchasing</b>	<a href="#">Prior Authorization (Word Document)</a>
Policies and Procedures	<a href="#">Prior Authorization (PDF)</a>
Sources/Contracts	<a href="#">Purchase Order (Available in eForms only)</a>
Forms	<a href="#">Purchase Requisition (Available in eForms only)</a>

# Purchasing Exceptions

Begin with Prior Authorization

Complete all required information

COLLEGE/DEPT.: \_\_\_\_\_  
ORGANIZATION NO: \_\_\_\_\_  
PROJECT NO: \_\_\_\_\_  
CONTACT PERSON: \_\_\_\_\_  
TELEPHONE: \_\_\_\_\_  
E-MAIL ADDRESS: \_\_\_\_\_

Acquisition in the amount of \$ \_\_\_\_\_ is requested from

Vendor: \_\_\_\_\_

Address: \_\_\_\_\_

Vendor Contact Name & Number: \_\_\_\_\_

Is/has the vendor ever been an employee of Kansas State University? Yes ☐ No ☐

If yes, please explain nature of employment and period of service?  
\_\_\_\_\_  
\_\_\_\_\_

Existing/Current Contract # \_\_\_\_\_

Attach a copy of the vendor's quote and/or proposed agreement.

Proposed Term of Contract (if applicable): \_\_\_\_\_  
\_\_\_\_\_



# Purchasing Exceptions

Answer all the questions – What is the “Why” for the exception?

Description of Material or Service (give details):

Reason for Exception (provide details):

Describe the research completed to ensure that no competition exists including a list of vendors who are unable to provide the goods or services:

# Purchasing Exceptions

Must be signed by authorized department signatory

\*\*\*\*\*

**College/Department Name:**

**Authorized Signature:**

(Date)

(Print Name & Title)

\*\*\*\*\*

## K-STATE PURCHASING USE ONLY

Approval:

(Signature & Title)

Date:

# Purchasing Reminders

- Local Authority for purchases less than \$10,000
- \$10,000 or more, not on contract, contact Purchasing
- DO NOT SIGN ANYTHING! Only a handful of people are authorized by the President to sign
- University Policy / Board of Regents / State of Kansas – PPM: <http://www.k-state.edu/policies/ppm/6300/6310.html>
- Solicitations: <https://dfs.ksu.edu/rfq/>



# Who Are We & How to Reach Us

Phone: 2-6214

Email: [kspurch@k-state.edu](mailto:kspurch@k-state.edu)

## Staff

### Assistant Director

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Kristin Copeland [kcopeland@k-state.edu](mailto:kcopeland@k-state.edu)