

Buyer's Guide

Terms

CO = Change Order (for a PO)

IFB = Invitation for Bid (Formal competitive procurements \$75,000 and above, lowest cost wins)

NYSCR = [NYS Contract Reporter](#) – “Classifieds” for NYS agencies to advertise bids. Required for purchases of \$50,000 or more and **not** purchased off State Contract and ad must run for min. of 15 business days.

OAG = Office of Attorney General (*must sign all contracts over \$75K*)

OGS = Office of General Services

OGS State Contract = OGS contracts that are vetted through the RFP/IFB process and available to all State agencies.

OSC = Office of the State Comptroller (*must sign all contracts over \$75K and any OGS State Contracts over \$200K*)

OTM = [Over-the-Max Lodging Request form](#) (when traveling and your hotel rate is over the state per diem rate)

P-Card = Procurement Card

PO = Purchase Order

Preferred Sources = NYS agencies that NYS prefers to buy from (Corcraft, NYSPSP, & NYSID). The products/services must be purchased from them regardless of price (see [Form/Function/Utility requirements](#))

RDD = Red Dragon Depot (e-Procurement System (POs and online catalogs))

RFQ = Request for Quote (under \$75K)

RFP = Request for Proposal (Formal competitive procurements \$75,000 and above, highest score wins)

ROPC = [Reasonableness of Price Checklist](#) (needed for quotes \$2,500 and more)

Single Source Procurement = One or two vendors can supply commodity/service, but State agency selects 1 vendor over the other for reasons such as the item is proprietary to an existing unit on campus, etc. *Must document reasoning on ROPC.*

Sole Source Procurement = Only one vendor can supply commodity/service. *Must document reasoning on ROPC.*

Standard Voucher = State form to be completed for any vendor using their SSN (not vendor EIN) or candidate reimbursement

Travel Authorization Form = Any employee traveling for business, must complete this form and submit to the Travel Administrator 2 weeks prior to travel.

Travel Voucher = State form to be completed by employees traveling. Must be submitted within 30 days of travel.

RDD

- 1) Login via [myRedDragon](#) (Faculty/Staff tab)
 - a. Right-hand column, **Important Links**, under **myRedDragon Resources**, click **Red Dragon Depot (Purchasing)**



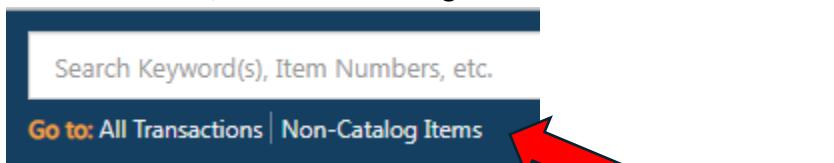
- 2) Catalog vs. Non-Catalog:

- a. **Catalog – 2 types:**

- i. **Hosted** – lives on our system (Central Stores, NYSPSP)
 - ii. **Punchout** – takes you to their website to shop and then back to RDD to checkout.
 1. Use P-card for Amazon & Staples
 2. Use PO for WB Mason

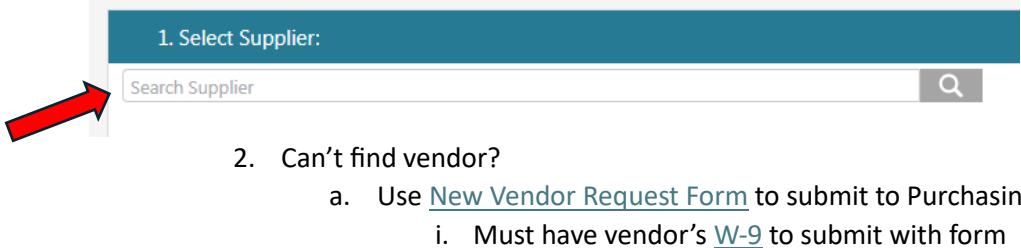
- b. **Non-Catalog** (all other vendors – **PO only**)

- i. Searching for Vendors under Non-Catalog Items
 - ii. Under Search Bar, Go to: **Non-Catalog Items**



New Non-Catalog Item

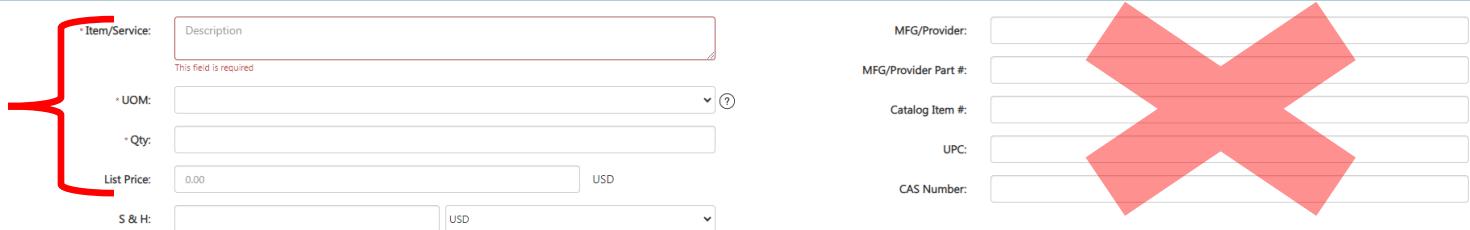
To add a non-catalog item you need to select the supplier first.



Creating PO

- 1) **Non-Catalog Item** (Catalog steps are similar, but skip to **Checkout** after punching out to website)
 - a. Search & select Vendor
 - b. Add Item(s)
 - i. Fill out left side:
 1. Item/Service
 2. UOM = EA
 3. Qty
 4. List Price
 - ii. Click **Add to Cart**

2. Add Item



Item/Service: This field is required

UOM:

Qty:

List Price: USD

S & H: USD

MFG/Provider:

MFG/Provider Part #:

Catalog Item #:

UPC:

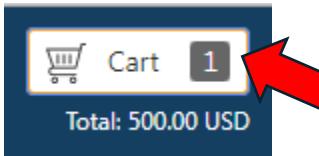
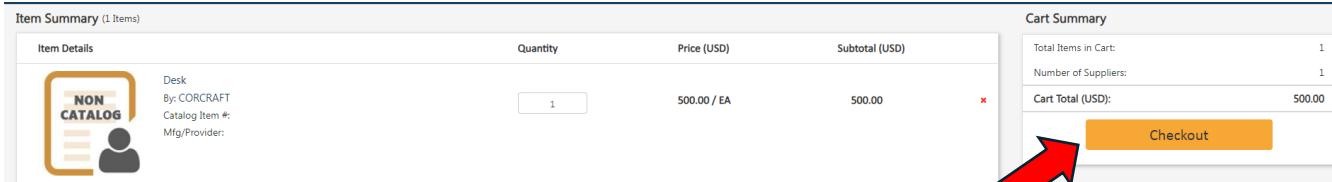
CAS Number:

[Add to Cart](#)

- iii. Add more items, if needed.
- iv. Proceed to Cart & **Checkout**



Or

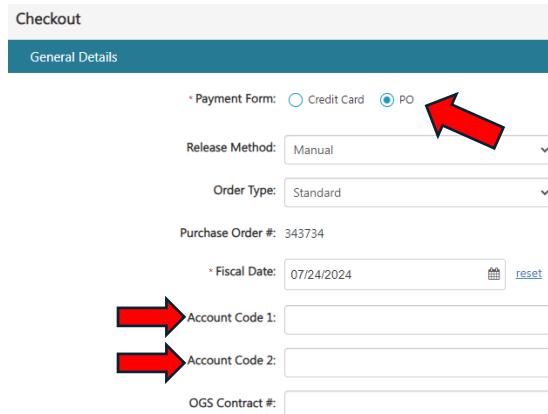
Item Summary (1 Items)				Cart Summary	
Item Details	Quantity	Price (USD)	Subtotal (USD)	Total Items in Cart:	1
 Desk By: CORCRAFT Catalog Item #: Mfg/Provider:	1	500.00 / EA	500.00	Number of Suppliers:	1
				Cart Total (USD):	500.00

[Checkout](#)

c. General Details Tab

- i. Payment Form = PO
- ii. Add Account Code 1 and Account Code 2 (if splitting accounts, not common)

1. Continue



Checkout

General Details

* Payment Form: PO Credit Card ←

Release Method: Manual

Order Type: Standard

Purchase Order #: 343734

* Fiscal Date: 07/24/2024 reset

→ Account Code 1:

→ Account Code 2:

OGS Contract #:

d. Delivery Details Tab

- i. Select **Central Receiving**

ii. **Continue**

e. Billing Details Tab

- i. Select **Accounts Payable**

ii. **Continue**

f. GL Details Tab

- i. Enter Account # in the favorite's Bar or click on the + symbol to search for Account # (do for 1st time using acct #)

GL Details

Account Code/Favorite

Select Account Code

Chart of Accounts:

Account Number: Search/Select

1. Apply
2. Continue

g. Line Item Details Tab

i. Notes & Attachments

1. Can add Internal Note and/or Attachments on the Line Item itself or off in the right-hand column

Line Item Details (Total: 1)

Item Details	Quantity	Contract Price	Subtotal	Tax	S & H	Item Total (USD)
1  Desk edit	1	500.00 / EA	500.00	0.00	0.00	500.00 more... 

Notes and Attachments:
Internal Note  External Note 

View Workflow Details

System Note: None
Total Line Items: 1
Subtotal: 500.00
Tax: 0.00
S & H: 0.00
Total Value (USD): 500.00

Notes and Attachments
Internal Note  External Note 

h. View Workflow Details Tab
i. Shows approval status

i. Click

Transaction Released Email

1) Email from noreply@esmsolutions.com

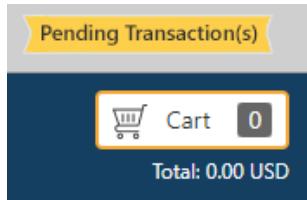
From: noreply@esmsolutions.com <noreply@esmsolutions.com>
Sent: Tuesday, July 23, 2024 7:42 PM
To: Casey Avery casey.avery@cortland.edu
Subject: Transaction Released: PO 343729 - Transaction 4095454 - 07/23/2024

NOTE: PO is not immediately sent to vendor

a. Purchasing must first encumber funds in the SUNY system and then the Purchasing AA will email or fax PO and cc: PO requester.

Pending Transaction(s)

1) If you see the **Pending Transaction(s)** banner, you have not submitted your order yet.
a. Click on the banner to select the PO



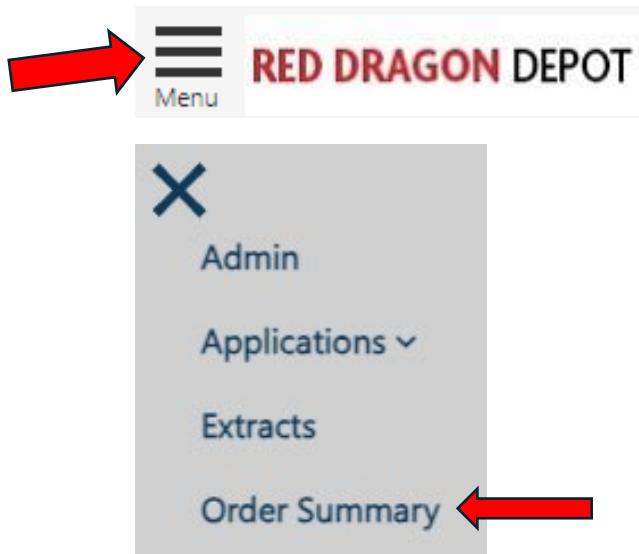
Pending Transaction(s)				1 Transaction(s) from Recent Cart	Click on Transaction Name to complete the Checkout process
Total Line Items: 1 Transaction #: 4095874	Total Value: 15.00 USD PO #: 343736	Create Date: 07/24/2024 Supplier: GREEK PEAK HOLDINGS LLC	Requester: Casey Avery :Miller Building, Room 310D	Pending Validation	
Hide 1 other Pending Transaction(s)					
Total Line Items: 1 Transaction #: 4095624	Total Value: 500.00 USD PO #: 343734	Create Date: 07/24/2024 Supplier: CORCRAFT	Requester: Casey Avery :Miller Building, Room 310D	Unsubmitted Transaction	



- If you no longer need the order, you can click on the  icon and delete the transaction.

Order Summary

- Search orders (old & new) – by requestor, PO#, vendor, etc.
 - View Workflow – see dates approved or who with currently
 - Active** = current approver PO is with



Purchase Order #:

Create Date:

Fiscal Date:

Transaction Number:

Chart of Accounts:

GL Account Code: - -

Location:

Total Value:

Order Type:

Account Code 1:

Account Code 2:

OGS Contract #:

Supplier:

Requester:

Approver/Manager:

Status:

Receiving Against PO

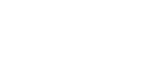
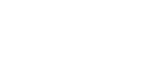
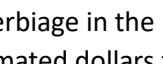
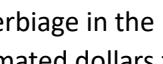
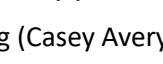
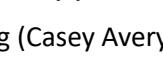
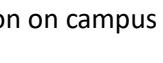
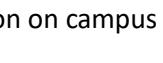
- Once item/service is actually received, *immediately* go into RDD to receive it.
 - Once order is completely received or confirmed nothing more to receive, **Close** order.



- To Receive:

- Select your PO

- Under Line Item Details Tab, receive either against the Quantity or Dollars and click **Update**

Line Item Details (Total: 5)					
Item Details	Quantity	Contract Price	Subtotal	S & H	Item Total (USD)
1 	Round Stic Xtra Life Ballpoint Pen Value Pack, Stick, Medium 1 mm, Blue Ink, Translucent Blue Barrel. 60/Box	1	4.22 / BX	4.22	0.00 4.22
Qty Received		Total Qty Received	Dollars Received	Total Dollars Received	
<input type="text"/>		0	<input type="text"/>	0.00	
					
Qty Received		Dollars Received			
<input type="text"/>		<input type="text"/>			
					
Qty Received		Dollars Received			
					
Qty Received		Dollars Received			
					
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				<img	

DO NOT change this as it affects your PO's and items may not be delivered to the correct place from Central Receiving.

Emailing Invoices

- 1) DO NOT upload invoices to RDD (unless approved as an NOR – see [NOR Policy](#))
 - a. Purchasing without a PO in place bypasses the purchasing process and could result in having to use other funding sources to pay invoice.
- 2) Invoices should be emailed directly to accounts.payable@cortland.edu.

RDD User Manuals

- 1) [User Manual](#)
- 2) [Order Summary](#)
- 3) [Approver Manual](#)
- 4) [Receiving Guide](#)

Purchasing/AP Website

- 1) [Staff](#)
- 2) [Forms](#)
 - a. AP
 - b. Business Cards/Stationary Requests
 - c. Capital Equipment
 - d. Moving Expenses
 - e. P-Card
 - f. Purchasing
 - g. Travel
 - h. Travel & NET Cards
- 3) [Allowable Purchases](#)
- 4) [Non-Allowable Purchases](#)
- 5) [MWBE/SDVOB](#)
- 6) [P-Card](#)
- 7) [Purchasing Guidelines](#)
 - a. [Purchase of Commodities and Services](#)
 - b. [Gift Certificates/Gift Cards](#)
 - c. [NYS Contract Reporter Ads](#)
 - i. \$50,000 or more and **not** off OGS State contract
 - d. [Reasonableness of Price](#)
 - e. [Tax Exemption](#)
- 8) [Policies](#)
 - a. Currently include:
 - i. Campus Speakers
 - ii. Food
 - iii. NOR
 - iv. Signature
- 9) [Preferred Sources](#)
 - a. Corcraft
 - b. NYSPSP
 - c. NYSID
- 10) [RDD](#)
- 11) [Speaker Contracts](#)
- 12) [Training & Checklists](#) – How-to guides
- 13) [Travel](#)
- 14) [Vendor Information](#)
 - a. How to be added to future procurements – [e-Sourcing site: Red Dragon Sourcing](#)