

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.

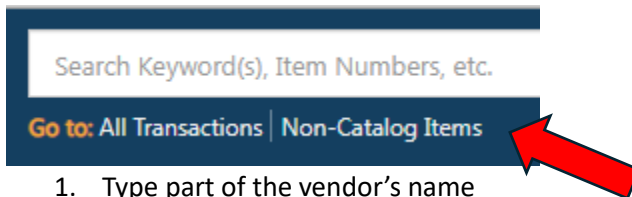
Travel Voucher = State form to be completed by employees traveling. Must be submitted within 30 days of travel.

RDD

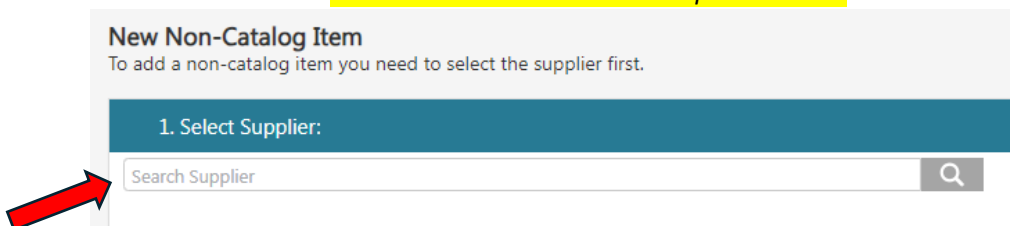
- 1) Login via [myRedDragon](#) (Faculty/Staff tab)
 - a. Right-hand column, **Important Links**, under **myRedDragon Resources**, click **Red Dragon Depot (Purchasing)**



- 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**



1. Type part of the vendor's name
 - a. *Less is more and don't use punctuation.*



2. Can't find vendor?
 - a. Use [New Vendor Request Form](#) to submit to Purchasing
 - i. Must have vendor's [W-9](#) to submit with form

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:

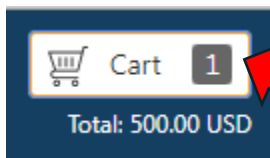
CAS Number:

Add to Cart

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

✓ Desk have been added successfully to your cart. [View Cart](#) ✕

Or



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

- 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: ☐ Credit Card ☒ PO

Release Method:

Order Type:

Purchase Order #: 343734

* Fiscal Date: [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: Chart of Accounts

Account Number: Search/Select

Apply Cancel

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 NON CATALOG Desk edit	1	500.00 / EA	500.00	0.00	0.00	500.00

Notes and Attachments:

Internal Note External Note

Continue

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

Submit

OR

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

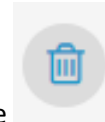
Pending Transaction(s)

Cart 0

Total: 0.00 USD

</

- i. If you no longer need the order, you can click on the



icon and delete the transaction.

Order Summary

- 1) Search orders (old & new) – by requestor, PO#, vendor, etc.
 - a. View Workflow – see dates approved or who with currently
 - i. **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

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



- b. To Receive:
 - i. Select your PO
 1. 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

OR

Dollars Received

NOTE: AP cannot pay invoice until the item/service is received in RDD.

Standing Orders

- 1) Must put "Standing Order" verbiage in the Item/Service Description
- 2) Qty should = 1 with total estimated dollars to spend over the FY (can always add funds with a CO)
 - a. Receiving against Dollars as invoices come in

Change Orders (CO)

- 1) Used to increase or decrease PO amounts
 - a. Use [Change Order Request form](#)
 - i. Open/download to desktop and then complete and email to Purchasing.

Changing Departments/Offices/Approvers

- 1) Immediately notify Purchasing (Casey Avery) of the following changes:
 - a. Location on campus changes
 - b. Approver changes

RDD Username Info

- 1) First Name will be your first **and** last name
- 2) Last Name will be your location on campus

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. Trave & 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](#)