CBIS Purchasing Guide

OSCAR

OSCAR is the purchasing system used by the Institute. The OSCAR home page has links to RPI's custom shopping sites, called "punch outs," for our preferred vendors (VWR, Fisher, Krackeler, Airgas, and more) that offer discounted product catalogs. If you would like to have access to the contract pricing information for these suppliers, contact your business coordinator and request to be signed up for an OSCAR account. A list of RPI's preferred vendors can be found here:

http://www.rpi.edu/dept/purchasing/preferred_marketplace_suppliers.html

Benefits of using punch-out vendors

1. Discounted pricing
2. Dedicated customer service reps for RPI
3. Faster order approvals and electronic invoicing
4. Faster delivery times
5. Pricing verification is not required

Additional information regarding purchasing can be found here:

http://www.rpi.edu/dept/procurement/

When placing an order for **supplies/services**, you'll need to provide certain information that is used to make a purchase order, or PO. The following information is required:

- **A completed *VPR Purchase Request* form**
    - The purchase request form is available in fillable .pdf format on the CBIS website: http://biotech.rpi.edu/contact/administration
    - Contact information- make sure you list the office/lab you are located in for possible questions.
    - Project/Fund information- this is the fund code# the order will be charge to.
    - Vendor information- if the supplier is already established with the Institute, the supplier name is only needed. If this is a new supplier complete all fields in this section. Please allow extensive additional time to place an order with a new supplier.
    - PI authorization and signature- PI approval can be in the form of a written or digital signature on order form or an email approval.
        - Approval via email must explicitly state the vendor, dollar amount and fund being used for the order. An example of the format could be, *"Professor, please approve the attached order to VENDOR in the amount of X to be charged to Fund #Y."*
    - **Research Purpose– How will the items/services being purchased be used and/or how do they relate to the aims of the project award being charged.**
        - **Purchase requests will be automatically returned without this information**

- Description of items:
  - Catalog Number- the supplier catalog number, this will eliminate interpretation by the Business staff.
  - Description- Use plain language in complete words to describe the name of the product and a brief description avoiding model numbers or abbreviations.
    - The more easily understandable information given, the faster an order can be processed.
  - Category- Choose the most fitting description of each item being requested. Most purchases can be categorized as either lab supplies or chemicals, please properly identify each item under the appropriate category.
  - Location- Include the room number for where each item being ordered will be stored. This is especially important for chemical orders for inventory tracking purposes.
- Special Ordering Instructions- for equipment parts or repairs provide the RPI Tag # and equipment name.

- **Vendor Quote with Pricing Verification**

  - Pricing verification, including shipping costs, from the vendor. A quote is preferred, but a screenshot or cart printout is acceptable, so long as it includes shipping in the pricing.
  - For orders that exceed $5,000, the user must provide **3 quotes from different vendors**.
    - If purchase can only be provided by one vendor or if there are considerations beyond price for using a particular vendor over another, a Sole/Single Source Justification can be provided in lieu of quotes.

Post-Order - Packing Slips

1. A packing slip will accompany your shipment.
2. In order to pay the invoice, the CBIS admin team needs the packing slip for what is being invoiced to prove that we received what is being paid for.
3. Please deliver packing slips ASAP to the business coordinator that placed the order. Delays in payment can lead to credit holds and additional fees.
4. If there is a problem with an order you've received, please notify the business coordinator who placed your order in a timely manner and let them know so the issue can be resolved.

Personal Reimbursement

Personal reimbursement is an option that is available in instances where an item that is necessary is unavailable from our current vendors. In order to be reimbursed, you or your PI must have your reimbursement pre-approved by Procurement and submit your reimbursement in Concur along with a copy of the approval email. **Purchases made without pre-approval may not be eligible for reimbursement- please contact your coordinator if you would like to explore reimbursement as a purchasing option.**