

MECHANICAL ENGINEERING & ISyE PURCHASING

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ME 1100-D

WE CAN HELP WITH...

- Purchases!
- Accounts payable
- Contracts for professional or consulting services
- Non-employee expense reimbursements, stipends, and honoraria
- ME 116, 2101G, and 316 copier accounts
- Postage and duplicating account management
- U of M Bookstore account management
- Gas cylinder purchases from external vendors

INTRODUCTION TO PURCHASING AT THE U

The University of Minnesota offers a handful of purchasing methods, but the preferred method is the use of a purchase order (PO). The purchase order is an official document from the University. It is an agreement between the U and the vendor that affords buyer protection, should there be a problem with products or services purchased. This is because the U follows Net30 terms with most vendors: the practice of paying within 30 days of the invoice date. Thus, payment can be withheld if necessary when a vendor does not uphold their end of the purchasing agreement. This is the primary benefit of using a PO rather than a credit card or reimbursement, especially for more complex or expensive purchases.

PURCHASING METHODS

(In order of decreasing preference)

- **U Market** – creates an official University PO, but is done by submitting an electronic “cart” instead of a paper PO request form.
 - Try logging into U Market on the MyU.umn.edu homepage
 - If you receive a log-in error, contact mepurch@umn.edu to request access
 - Follow the U Market ordering instructions provided by Julie/Haewon
 - You will be notified by the shipping staff once your order arrives in ME 1124
 - Pick up your order at your earliest convenience and sign the check-out sheet
 - Inform Julie or Haewon of any product problems
- **Purchase Order** – official University document that is sent to the vendor requesting their products, but is entered manually by Haewon or Julie. Used for vendors not available on U Market.
Submit a Purchase Order Request Form to ME Purchasing:
 - Fill out the Purchase Order Request Form and turn in to ME 1100-D
 - Please complete all fields on the form completely and thoroughly- especially the justification for the purchase!
 - Please fill the fields electronically and print it rather than write on it to ensure legibility
 - If you have a quote, please attach it to the PO request
 - If your order exceeds the 5 lines on the PO form, you do not need to fill out multiple PO requests- please attach a list with all the item details, or send a spreadsheet, etc.
 - Students: have your PI sign the form; faculty: please sign the form
 - Submit to ME 1100-D (or mepurch@umn.edu if necessary)
 - Purchase order request will be entered and a PO will be sent to the vendor
 - ME Purchasing staff will email you the PO # for your reference.
 - If you have an inquiry about the status of your order after it has been given a PO #, please contact the vendor and reference your PO #. Once it has left our office, we do not usually know anything about the order status.

- Additionally, if you would like to have expedited or special shipping, please discuss and request this from the vendor directly after the order is placed. This is because we do not pay for the shipping until we pay for the merchandise, and otherwise, most companies will choose the most economic shipping method available.
- Items are shipped to the University and the vendor issues us an invoice, to be paid within 30 days of invoice date
- You will be notified by the shipping staff once your order arrives in ME 1124
- Pick up your order at your earliest convenience and sign the check-out sheet
- Inform Julie or Haewon of any product problems

Please inspect ALL PO purchases to ensure items are in good, working condition. If all items are free of defects and received, please sign the packing slip and submit it to ME 1100-D or ME 1124. If items are damaged or missing, do NOT sign the slip; contact mepurch@umn.edu about exchanges/returns. The packing slip informs us that we may pay for the purchase. **If we do not receive one by the time of invoicing, we will email you for confirmation of receipt on orders > \$100. For orders of \$100 or less, we will pay them without asking.** Timely payments ensure that we maintain positive vendor relations.

- PCard – this is a University credit card. ME Purchasing uses one to buy products from vendors if they will not allow purchase orders. Faculty and staff interested in applying for a PCard should contact the Department Card Administrator, Pam Wilson, at pwilson@umn.edu
 - Capital equipment is NOT allowed on a PCard
 - Cannot be used for lodging expenses, alcohol, and other items dictated by [policy](#).
- Expense Reimbursement – if the need is urgent, you may make a purchase out of pocket for items typically purchased via PO or PCard and request reimbursement from the University. Receipts should be retained and submitted with a reimbursement request. This is the least preferable purchasing method and should be avoided whenever possible. Appropriate situations for such purchases include weekends when the office is closed and emergency purchases needed the same day.

A WORD ABOUT JUSTIFICATIONS

- Please be sure to answer the “5 W’s” – Who, What, Where, When, Why – for every purchase or reimbursement. This is to prevent any trouble if your account funding the purchase is selected for audit.
 - Keep in mind that this should be simple and straightforward so that non-research personnel could understand the basic reason for the purchase.
 - Example: “John Smith is purchasing fuses to be used in ME 1134. These items are needed for safe wiring of power supplies and for replacing blown fuses. This will allow the power supplies to operate measurement and control equipment during solar experimental work.”

MISCELLANEOUS

- Purchases for software agreements or computers/printers need to be approved by our IT department
 - Once your request is submitted to us, we will forward it to Ray Munro for review
- Purchases over \$10k and \$50k have special paperwork, as you will see below.
- We have a list of [U-wide contracted vendors](#), which is a great place to start looking for reputable vendors to do business with.

Please come see us or ask any questions you have!

We are happy to help you! 😊

WHAT PAPERWORK DO I NEED TO FILL OUT? WHEN YOU NEED TO MAKE A PURCHASE, ASK YOURSELF...

