

Introduction to Sourcing and Procurement at MIT



What We Will Cover Today

- ✧ Who we are and what we do
- ✧ Overview:
 - ✧ How to purchase products and services at MIT
 - ✧ Additional resources
 - ✧ Questions, and how can we best support you?
- ✧ Services and Contracts Overview: Negotiating the most favorable terms and conditions to protect you and the interests of MIT.

Sourcing and Procurement

- **Sourcing** assists with vendor selection for products and services, supplier competition and proposals from vendors, negotiating pricing, reviewing vendor terms and conditions, and developing contract relationships with vendors.
- **Procurement** assists with placing orders, negotiating pricing, compliance, resolving vendor disputes/problems, and customer service.
- Provide buying assistance, while ensuring that all purchases meet audit and compliance regulations.

Our Primary Focus

- ✧ **Working to yield significant savings to MIT**
 - ✧ Time: Developing and maintaining efficient systems and customer-friendly methods of buying products and services (Atlas, eCat, Procurement Card)
 - ✧ Money: Establishing preferred/partner supplier relationships based on the needs of the MIT community (SmartBuy)
- ✧ **Compliance**
 - ✧ Facilitate required approvals for purchases to assure compliance with MIT policies, federal and sponsor rules/regulations (OSP, radioactive materials, property, etc.)

We Are Here for You

Sourcing and Procurement

Office of the Vice President for Finance

Massachusetts Institute of Technology

600 Technology Square, NE49-4122

Phone: 617-253-7241

Fax: 617-252-1558

Email: procurement@mit.edu

<http://vpf.mit.edu/procurement>



NE49
600 Technology Square

Helpful Tips Before Getting Started

Time Savers

Email Notifications:

This feature is designed to provide you with updates about the status of your requisition (**i.e. request to purchase**) from creation to Purchase Order (PO) number assignment.

- For example: Requisition changed, needs approval, approved, or rejected
- Purchase order is created

MIT Roles Database: (Spend Authorizations)

A database that contains information about who is authorized to purchase and approve payment for products/services on departmental accounts/cost object(s).

- You **must** have “**Can Spend or Commit Funds**” authorization on your departmental account/cost object(s) to create a purchase requisition for goods/services, and to print invoices and purchase orders.
- Contact your departmental AO or FO for further assistance

Settings and Authorizations

<https://atlas.mit.edu>

The screenshot shows the Atlas MIT website interface. At the top, the navigation bar includes the Atlas logo with the tagline "navigating your MIT world", and links for HOME, ABOUT ME, and CAMPUS LIFE. On the right, there is a "PEOPLE SEARCH" button and a "welcomed" user indicator. A yellow banner at the top left contains an "Important notice" regarding the eCat purchasing system's unavailability from 9:00PM on Friday, July 18, 2014, to 12:00PM on Sunday, July 20, 2014. A blue menu on the left lists various services: Time and Vacation Entry, Buying, My Reimbursements, Service Requests, Training, and Events, with a "FULL CATALOG" link at the bottom. A dropdown menu is open, showing options: Settings and Authorizations (highlighted), Submit Feedback, About Atlas, For Emergencies, Help Desk, and Log Out. The main content area is titled "Home" and features a large image of a building with columns and cherry blossoms. Below the image are four informational boxes: "Atlas. Personalized." (customize homepage menu), "Register events online!" (new Digital Events application), "AdminConnect" (linking MIT administrators), and "Payroll Allocation" (streamlined direct deposit options).

Select/Save Settings

MY PROFILE *(certificate required)*

- Personal Information
- Settings and Authorizations**

MY BENEFITS

- Benefits
- Discounts and Perks

MONEY MATTERS *(certificate required)*

- Paystubs
- W-2s
- Tax Withholding
- Direct Deposit Preferences

Settings and Authorizations

Email Notification Settings

- Email me when...
- Requisition is approved
- Requisition is rejected
- Purchase Order is created
- Journal Voucher is approved by VPF
- Journal Voucher is rejected by VPF
- Requisition needs approval
- Requisition has been changed
- RFP is rejected by Accounts Payable or OSP
- MIT deposits a travel or RFP reimbursement to my bank account
- Current payroll payment is available for review in ESS

Email Address: welcomed@mit.edu

Select/Save Preferences

Save Changes

Password Settings

Kerberos is a network authentication protocol designed to provide strong authentication for client/server applications by using secret-key cryptography. IS&T recommends changing your Kerberos password every 90 days to protect your identity. Click here to [change your password](#).

MIT Certificate

Certificates allow you to access secure web services at MIT, such as Atlas, WebSIS, and Stellar, or to access any MIT certificate-protected site. You need to install them for each web browser on each computer or device that you use. Certificates expire once per year, requiring you to [renew your certificate](#).

Authorizations

The Roles Database stores access rules (user authorizations) for applications such as SAP, Data Warehouse, and the Graduate Admissions System, among others. Specially Authorized Departmental and Central Administrators use the web-based Roles Database application to [view and manage the user authorizations](#).

View your spend authority

MIT Roles Database

https://rolesweb.mit.edu/req_auth.html



One-step lookup of requisitioner and approval authorizations

This page allows you to do lookups of people who have requisitioning or approval authorizations for a given cost object. The results will take into consideration the Release Strategy for the cost object and the accompanying rules. To use this facility, you need [viewing authorizations](#) to see authorizations within category SAP.

Pick a business function. Enter a 7-digit cost object (the prefix letter is not needed). Then click the SUBMIT button to see a list of people authorized to do the given business function.

Who is authorized to do ...? for Cost object:

- Requisition creation in SAP
- Credit card verification in SAP
- Approval of requisitions
- Invoice approval
- Travel documents approval

Click here to view who can signature approve:

- Paper Invoices >\$3000 for PO Number series “45”
- All Paper Invoices for PO Number series “55”

MIT Roles Database



Who can do requisition creation in SAP for cost object 1633507?

Information about Cost Center C1633507 *

Name: Procurement M&S

Supervisor: O'Toole /Gerard NE49-4170

Addressee: Matos /Joy NE49-2000

Release strategy: Model 4

Start/end date: 07/01/1999 - 12/31/2999

Term. code: (none)

[Find the departmental Primary Authorizers related to F1633507](#)

Requisition creation in SAP for fund F1633507 (related authorizations)

To create a requisition, you need a CAN SPEND OR COMMIT FUNDS authorization that applies to the fund or fund center, plus a REQUISITIONER authorization. (REQUISITIONER authorizations are checked, but not shown below.)

Last, First Name	Kerberos Username	Function Name	Qualifier Code
Alleyne, Valerie	VALLEYNE	CAN SPEND OR COMMIT FUNDS	F1633507
Alleyne, Valerie	VALLEYNE	CAN SPEND OR COMMIT FUNDS	FCMIT
Drake, Doris	DDRAKE1	CAN SPEND OR COMMIT FUNDS	F1633507
Durham, Rositha	RDURHAM	CAN SPEND OR COMMIT FUNDS	F1633507
Malconian, Sara	SMALCO	CAN SPEND OR COMMIT FUNDS	F1633507
Marcum, Allen	AMARCUM	CAN SPEND OR COMMIT FUNDS	FC_VPFINANCE
Mcgrath, Kathleen	KMCGRATH	CAN SPEND OR COMMIT FUNDS	FCMIT
O'Toole, Gerard	GOTOOLE	CAN SPEND OR COMMIT FUNDS	FC_PROCURE
Reynolds, Joanne	JOANNER	CAN SPEND OR COMMIT FUNDS	F1633507
Ruiz, Israel	IRUIZ	CAN SPEND OR COMMIT FUNDS	FC_VPFINANCE
Schultz, Carol	CSCHULTZ	CAN SPEND OR COMMIT FUNDS	FC_VPFINANCE
Talamantes, Cecilia	CCTALA	CAN SPEND OR COMMIT FUNDS	F1633507



Purchasing Products and Services

Not Sure Where to Buy?

Important notice: The eCat purchasing system will be unavailable from 9:00PM, Friday, July 18, 2014, to 12:00PM, Sunday, July 20, 2014, for system maintenance. Please plan your eCat purchases accordingly.

Menu edit

- Time and Vacation Entry
- Buying**
- My Reimbursements
- Service Requests
- Training
- Events

FULL CATALOG

Buying

[Need assistance?](#)

Create requisitions and review purchase orders.

eCat (Electronic Catalog)

Create requisitions for eCat vendors.

External (Outside Vendors)

Create requisitions for External (non eCat) vendors.

Internal (MIT Services)

Create requisitions for Internal Providers (e.g. CopyTech, AV Services, Sodexho Catering).

External (Facilities Only)

Create requisitions for External Vendors (for facilities employees only).

Requisition Creator Inbox

Find your rejected requisitions; correct and resubmit them for approval.

Find Requisitions

Find and display requisitions.

Find Purchase Orders

Find and display purchase orders.

Close Purchase Orders

Close NB, GR and BL purchase orders; contracts (57xxx) are closed by emailing pocloseout@mit.edu.

Place Personal Orders

Find discounted prices for computers, office supplies, and cell phones

Additional Resources

[Procurement Forms](#)

[SmartBuy](#)

Click here to view details about MIT's preferred vendors.

Feedback



Search for MIT's Preferred Vendors

Sourcing & Procurement

[Home](#) [Staff](#) [Glossary](#) [FAQs](#) [Site Map](#)

Sourcing & Procurement

[Policies & Procedures](#)

[Forms](#)

[Resources](#)

[SmartBuy](#)

[About SmartBuy](#)

[Suppliers](#)

[Products and Services](#)

[Purchase Method](#)

[Ask a Specialist](#)

Can't find what you need? Send us an [email](#) or call us at 617-253-7241.

Buying for MIT? Start here.

SmartBuy is an easy-to-use online tool designed to help you make the smartest purchase you can make. Smart in terms of quality. Smart in terms of price. Smart in terms of convenience. Use this handy site to identify and connect with the best supplier for the job—and learn the smartest way to pay for the goods or services you receive.

Search

1

ENTER A SUPPLIER NAME HERE

No vendor found!

Travel Vendors

2

Purchase method

3

eCAT MIT's online ordering system. Learn more.	PCard MIT credit card for small non-Travel purchases. Learn more.	Atlas MIT's purchasing portal. Learn more.	Travel Card MIT credit card for making Travel purchases. Learn more.
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Ask specialist

Procurement New to purchasing goods and services at MIT? Start the buying process by checking in with a specialist. Even if you are an experienced MIT buyer, a specialist will help make sure that the supplier is giving you the best price and meeting all MIT terms and conditions. Ask a procurement specialist.	Travel If you are looking to plan a trip, book a trip or, research the cost of a trip and need some advice on how to get the best rates contact a travel specialist to help you. Ask a travel specialist.
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Preferred Methods: 4 Options

Preferred methods of purchasing products and services:

- ① Electronic Catalogs (eCat) via Atlas
 - ❖ Electronic ordering/invoicing direct to ~60 MIT Preferred vendors
- ② MIT Procurement Card (ProCard)
 - ❖ Approved items <\$3000, one time purchases from vendors
- ③ External Purchase Requisitions (via Atlas)
 - ❖ All other general and high dollar purchases
- ④ Internal Providers (via Atlas)
 - ❖ Audio/Visual, catering, copy center services, etc.

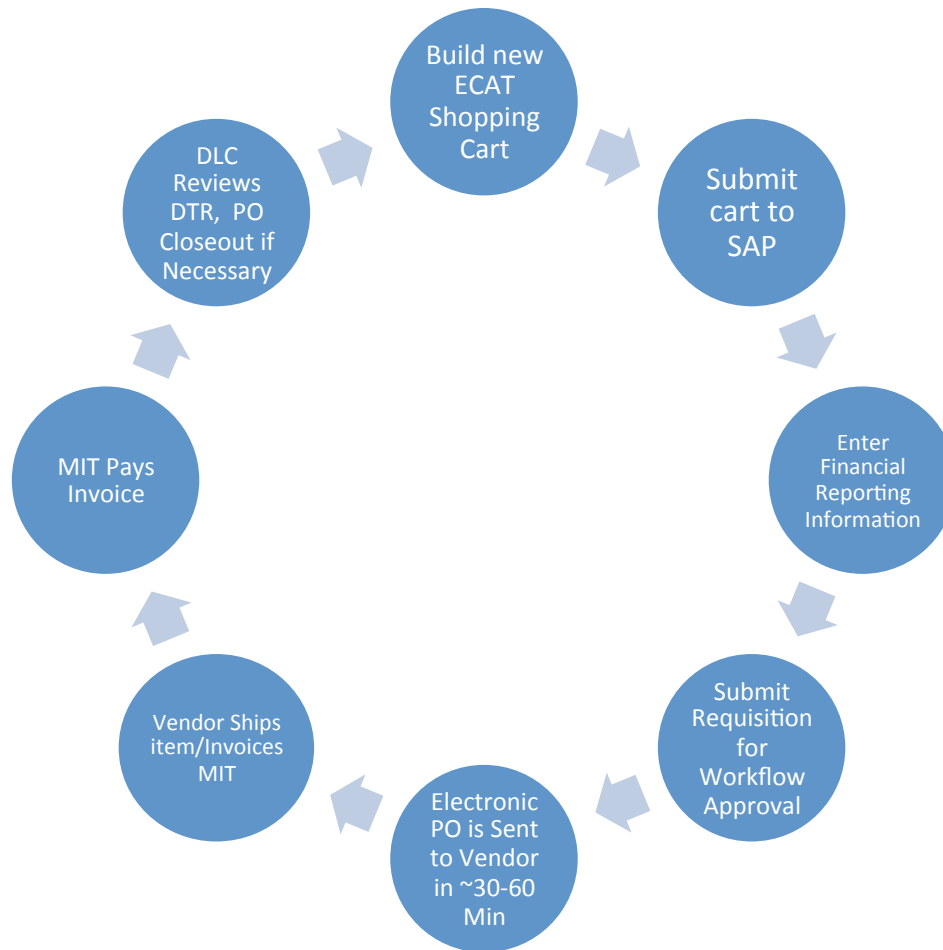
eCat via Atlas



eCat Option

- ✧ Fastest option for purchasing goods under \$10,000
 - ✧ Electronic and web based buying experience
 - ✧ Facilitates requisition authorization/approvals
 - ✧ Electronic purchase order (PO) transmission to many of MIT's contract and preferred suppliers
 - ✧ MIT discounts have already been negotiated
 - ✧ Please update and maintain your eCat profile for faster ordering on subsequent buys
 - ✧ Multiple ship to addresses can be stored in your profile
 - ✧ eCat help: ecat@mit.edu

Electronic Ordering Experience



Where to Find eCat on Atlas

<https://atlas.mit.edu>

Atlas navigating your MIT world

HOME

ABOUT ME

CAMPUS LIFE

PEOPLE SEARCH

welcomed ▾

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Menu ?

edit ↗

Time and Vacation Entry

Buying

My Reimbursements

Service Requests

Training

Events

FULL CATALOG

Buying

[Need assistance?](#)

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Find Purchase Orders

Find and display purchase orders.

Close Purchase Orders

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Place Personal Orders

Find discounted prices for computers, office supplies, and cell phones

Feedback



eCat Profile Maintenance

Shop Everything ▾

Go to: [advanced search](#) | [favorites](#) | [forms](#) | [quick order](#) Browse: [suppliers](#) | [categories](#) | [contracts](#)

Welcome to eCat! If you need any help with navigating the catalog, please visit the new [eCat help](#) webpage for video tutorials, answers to FAQs, and other helpful resources. For additional assistance, please contact ecat@mit.edu or call 617-253-7241.

Click here to update/select addresses for your user profile.

Derek Welcome

[View My Profile](#)




















[Set My Home Page](#)

My Recently Completed Carts 5


My Pending Purchase Orders 1

My Recently Completed Purchase Orders 5,161

▼ Preferred/Partner Suppliers

 Alfa Aesar	 Staples	 VWR International	 Westnet	 Agilent Life Sciences	 Beckman Coulter
 GovConnection	 Grainger	 Mckesson Medical Surgical	 Airgas	 Ambit Creative Group	 Apple
 Creative Office Pavilion	 Dell	 KI Office Furniture	 Red Thread	 Sigma Aldrich	 Thorlabs
 NEW Account SignUp CAMPUS ONLY	 Existing Account - TO SHIP				

▼ Lab and Research Suppliers

 Agilent Life Sciences	 Airgas	 Alfa Aesar	 Beckman Coulter	 Sigma Aldrich	 Thorlabs
 VWR International	 Affymetrix	 BD Biosciences	 BioExpress	 Bio-Rad Laboratories	 Cambridge Isotope

Contact Information

Derek Welcome

User Name welcomed

- User Profile and Preferences ▾
- User's Name, Phone Number, Email, etc.**
- Language, Time Zone and Display Settings
- Default User Settings ▾
- Custom Field and Accounting Code Defaults
- Default Addresses** **2**
- Cart Assignees
- Payment Options
- User Roles and Access >
- Ordering And Approval Settings >
- Permission Settings >
- Notification Preferences >
- User History >
- Administrative Tasks >

User's Name, Phone Number, Email, etc. ?

First Name

Last Name

Phone Number

+1 (617) 253-7241
Country Code, Area, Phone Number, Extension

E-mail Address

Location

Position

User Name welcomed

Authentication Method Certificate

Organization Terms and Conditions accepted on 3/31/2008 9:31 AM [Terms and Conditions](#)

Ship To Profile

Derek Welcome

User Name welcomed

- User Profile and Preferences >
- Default User Settings ▾
- Custom Field and Accounting Code Defaults
- Default Addresses**
- Cart Assignees
- Payment Options
- User Roles and Access >
- Ordering And Approval Settings >
- Permission Settings >
- Notification Preferences >
- User History >
- Administrative Tasks >

Default Addresses

1 ✖ No addresses defined in profile.

Ship To Bill To

2 Select Addresses for Profile

Select an address to edit

✖ No addresses defined in profile.

Shipping Addresses	Address Search
	Nickname / Address <input type="text"/>
	Text
	Results Per Page <input type="text" value="10"/>
	<input type="button" value="Search"/>

- 3
- Enter "Stata" for buildings 1 through 66, and 76
 - Enter "E19 Recvng" for buildings E14, E15, E17, E18, E19, E23, E25, E40, E51, E52, E53, E60, E62, and 68
 - For buildings EE, N, NE, NW, W and WW, enter your MIT building Number Example: "W91"
- 4
- Search/select your shipping address. **If your address does not appear, notify the eCat team: ecat@mit.edu**

Complete/Save Address

Derek Welcome

User Name welcomed

- User Profile and Preferences >
- Default User Settings ▾
- Custom Field and Accounting Code Defaults
- Default Addresses**
- Cart Assignees
- Payment Options
- User Roles and Access >
- Ordering And Approval Settings >
- Permission Settings >
- Notification Preferences >
- User History >
- Administrative Tasks >

Default Addresses

⊗ No addresses defined in profile.

Ship To Bill To

Select an address to edit

Select Addresses for Profile Delete Address

⊗ No addresses defined in profile.

Shipping Addresses

Edit Selected Address

Nickname	Bldg_NE49
Default	<input checked="" type="checkbox"/>
Current Default Address	---
ADDRESS	
Name	Derek Welcome
Bldg.	NE49
Rm. No.	4122
E-mail	welcomed@mit.edu
Address Line 1	MIT Bldg. NE49
Address Line 2	600 Tech Sq
City	Cambridge
State	MA
Zip Code	02139
Country	United States

Save

Check here to indicate your default ship to location

Bill To Profile

Derek Welcome

User Name welcomed

User Profile and Preferences ▸

Default User Settings ▾

Custom Field and Accounting Code Defaults

Default Addresses

Cart Assignees

Payment Options

User Roles and Access ▸

Ordering And Approval Settings ▸

Permission Settings ▸

Notification Preferences ▸

User History ▸

Administrative Tasks ▸

Default Addresses

1 No addresses defined in profile.

Ship To **Bill To**

Select an address to edit
No addresses defined in profile.

2 Select Addresses for Profile

Billing Addresses

Select Address Template

Select Address Template

3 Accounts Payable
MIT_LL AP

Save Bill To Profile

Derek Welcome

User Name welcomed

- User Profile and Preferences >
- Default User Settings ▾
- Custom Field and Accounting Code Defaults
- Default Addresses**
- Cart Assignees
- Payment Options
- User Roles and Access >
- Ordering And Approval Settings >
- Permission Settings >
- Notification Preferences >
- User History >
- Administrative Tasks >

Default Addresses

⊘ No addresses defined in profile.

Ship To **Bill To** ?

Select an address to edit Select Addresses for Profile Delete Address

⊘ No addresses defined in profile.

Billing Addresses

Edit Selected Address ?

Nickname	Accounts Payable
Default	<input checked="" type="checkbox"/>
Current Default	---
Address	

ADDRESS

Contact Line 1	Accounts Payable
Contact Line 2	Massachusetts Institute of Technology
Address Line 1	PO Box 9169
City	Cambridge
State	MA
Zip Code	02139
Country	United States

Save

Check here to mark this address as your default bill to location

Supplier Selection/Build Your Order

MIT ecat

Derek Welcome | Action Items | Notifications | 4.72 USD

Shop | Shopping | Dashboard | Shopping Home | Home/Shop

Shop Everything Go

Go to: advanced search | favorites | forms | quick order Browse: suppliers | categories | contracts

[Manage Showcases]

Welcome to the new and improved eCat user interface, which includes an array of features designed to simplify your buying experience. Visit the new eCat homepage for video tutorials, answers to FAQs, and other helpful resources. For additional help, please contact ecat@mit.edu or call 617-253-7241.

Select an icon and create your order

Preferred/Partner Suppliers

 Alfa Aesar	 Staples	 VWR International	 Westnet	 Agilent Life Sciences	 Beckman Coulter
 GovConnection	 Grainger	 Mckesson Medical Surgical	 Airgas	 Ambit Creative Group	 Apple
 Creative Office Pavilion	 Dell	 KI Office Furniture	 Red Thread	 Sigma Aldrich	 Thorlabs
 NEW Account SignUp CAMPUS ONLY	 Existing Account - TO SHIP				

Lab and Research Suppliers

 Agilent Life Sciences	 Airgas	 Alfa Aesar	 Beckman Coulter	 Sigma Aldrich	 Thorlabs
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<https://solutions.sciquest.com/apps/Router/Home?mstmp=1395093295745>

Order Review and Checkout

👇 Continue Shopping

1 Item(s) for a total of **94.95** USD

 **Shopping Cart** for Derek Welcome

Proceed to Checkout

Save

Cart Name

Supplier / Line Item Details ?

[Show line details](#)

Staples [more info...](#)

[Add non-catalog item for this supplier...](#)

The item(s) in this group was retrieved from the supplier's website. [What does this mean?](#)

You can no longer access this item(s) on the supplier's website. [What does this mean?](#)

Line(s): 1

Product Description	Catalog No	Size / Packaging	Unit Price	Quantity	Ext. Price	<input type="checkbox"/>
1 Post-it Self-Stick Easel Pad, 30 Sheets, White, Unruled, 30"H x 25"W, 6/Ct more info...	760951	PK	94.95	<input type="text" value="1"/> PK	94.95 USD	<input type="checkbox"/>
Select price or contract...						
Supplier subtotal					94.95USD	
Subtotal					94.95	
Total					94.95 USD	

Shipping, Handling, and Tax charges are calculated and charged by each supplier. The values shown here are for estimation purposes, budget checking, and workflow approvals.

Save

Proceed to Checkout

[view cart history](#)

Remove Items?

PO Number

For selected line items

- Remove Selected Items
- Remove Selected Items
- Remove All Items
- Move to Another Cart
- Add to Draft Cart or Pending PR/PO
- Add to PO Revision

Go

No POs for it

Review and Submit Cart/Order

Default Information from User Profile

Click here to change shipping address

Submit Order When Done

General	Shipping	Billing
<p>Cart Name: 2014-07-18 welcomed 01 edit</p>	<p>Ship To edit</p> <p>Derek Welcome NE49 4122 welcomed@mit.edu MIT Bldg. NE49 600 Tech Sq Cambridge, MA 02139 United States</p> <p>Delivery Options edit</p> <p>Ship Via: Best Carrier-Best Way</p>	<p>Bill To edit</p> <p>Accounts Payable Massachusetts Institute of Technology PO Box 9169 Cambridge, MA 02139 United States</p>

Supplier / Line Item Details

For selected line items:

PO Number: No POs for this supplier [View/edit by line item...](#)

Staples [more info...](#)

[Add non-catalog item for this supplier...](#)

The item(s) in this group was retrieved from the supplier's website. [What does this mean?](#)
You can no longer access this item(s) on the supplier's website. [What does this mean?](#)

Line(s): 1

Product Description	Catalog No	Size / Packaging	Unit Price	Quantity	Ext. Price	<input type="checkbox"/>	<input type="checkbox"/>	edit
1 Post-it Self-Stick Easel Pad, 30 Sheets, White, Unruled, 30"H x 25"W, 6/Ct more info... Manufacturer Name: 3M Corporation Manufacturer Part Number: MMM559VAD6PK Supplier Part Auxiliary ID: 760951 more info...	760951	PK	94.95	1 PK	94.95 USD	<input type="checkbox"/>	<input type="checkbox"/>	edit
Supplier subtotal					94.95USD			

Shipping, Handling, and Tax charges are calculated and charged by each supplier. The values shown here are for estimation purposes, budget checking, and workflow approvals.

Subtotal	94.95
Total	94.95 USD

Create Requisition – eCat Vendor

MIT

Create Requisition – ECAT Vendor

General Information

Created by	Derek K Welcome	* Requisition Created for	welcomed
Goods Recipient	Derek Welcome	Unloading Point MIT Bldg-Rm/Phone	NE49-4122
Tracking #	45233130	Recipient's Email Address	welcomed@mit.edu
Vendor #	165227	Vendor Name	STAPLES ECAT ONLY
Delivery Text	Punchout		
Internal Note (not printed on PO)	PLEASE DO NOT ENTER ANY TEXT IN THIS AREA		

Line Item Information

10	Item Summary	* Distrib	* Cost Object	* G/L Acct
Description	8.5X11 MIT WMARK BND WE 500/RM			
SKU/Part #	908936	100 %	1111000	420258 - Office Supplies
Delivery Date	03/19/2014	0 %		
* Material Group	Office Supplies	0 %		
Quantity	4 RM x \$14.4100		=	Line Item Total \$57.64
				Total Requisition \$57.64

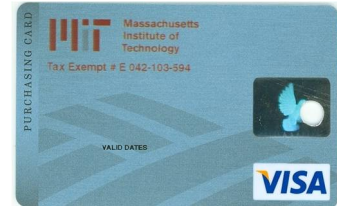
5 Submit Requisition Clear Form

Procurement Card

Procurement Card Option

Preferred buying tool for low-dollar orders (< \$3,000)

- ✦ Laptops, PCs, servers < \$1,000
- ✦ One-time purchases with new vendors
- ✦ Recurring purchases such as FedEx, bottled water, cell phone bills, etc.



Questions: procard@mit.edu

Application & Training: <http://vpf.mit.edu/pcard>

ProCard Policy

Non-Allowed Purchases

All purchases made using the MIT Procurement Card are subject to the Institute's policies and procedures regarding appropriate and allowable purchases. The following regulated or otherwise restricted items may not be purchased using the Procurement Card:

Equipment purchases costing \$1000 or more	Travel and Entertainment (incl. hotels, airlines, car rentals, food, & out-of-state conferences)
Furniture	Software (except standard over-the-counter)
Equipment, furniture, fleet rentals or leases	Consulting, Professional or Temporary Services
RAD substances, controlled drugs, firearms, ammunition, and other regulated items	Gifts and Gift Certificates (except for Rewards & Recognition program)
Respirators and protective masks	Items for personal use
Hypodermic needles and syringes	Alcohol
Chemicals in quantities larger than 4-liter sizes	Live Animals
Gases and gas cylinder rentals	Precious metals
Tuition	Flowers, plants, contributions, greeting cards, life events such as birthday, get well, sympathy, farewell, etc.
Fire Extinguishers and Space Heaters	Cash advances

External Purchase Requisitions

External Requisition – When and Why?

- ✧ General purchasing of products not available via eCat
- ✧ Your order/requisition total is greater than \$10,000
- ✧ Price quotations or contracts exist (attachments)
- ✧ Changing (e.g. add funds, price changes) or cancelling purchase orders
- ✧ Professional Services (functions performed by contractors, vendors or companies - e.g. Consulting, Legal etc.)
- ✧ Blanket Purchases - Recurring purchases of products and services (e.g. temporary help, standing orders, etc.), for a specified period (<1 year).
- ✧ Purchasing from new vendors
- ✧ Purchasing restricted or sensitive items
- ✧ Help: procurement@mit.edu

Restricted and Sensitive Items (Approval Required – Prior to Purchase)

Procurement & Sourcing

- ✧ Ethyl Alcohol
- ✧ Firearms
- ✧ Needles and syringes
- ✧ Hypodermic needles
- ✧ Travel

Department of Facilities

- ✧ Construction work
- ✧ Fire extinguishers

Environment Health & Safety

- ✧ Toxins/Poison
- ✧ Radioactive materials
- ✧ Animals
- ✧ Bio-toxins

Office of Sponsored Programs

- ✧ Memorabilia
- ✧ Promotional material
- ✧ Flowers
- ✧ Holiday parties

External Requisition Requirements

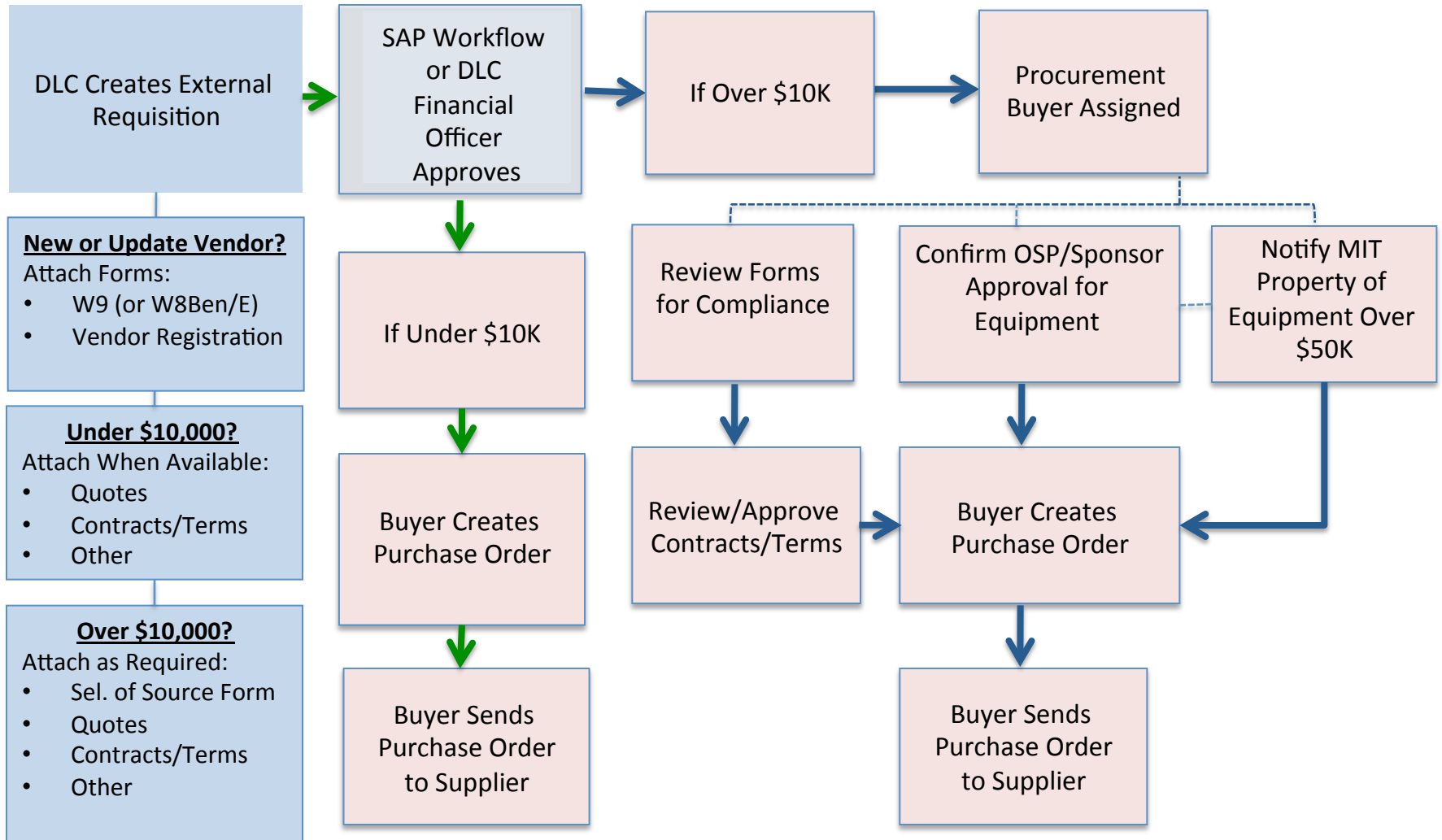
Data Entry

- ✧ Vendor: Company or individual name/address that MIT will pay for the products/ services
- ✧ Ship To Information: MIT Building and Room, 7 Digit Phone Number, Contact Name
- ✧ Clear Item Description, quantity and unit price
- ✧ All line items being purchased at a cost
- ✧ Financial Information (Cost Object, GL Account, Material Group)

Forms/Attachments:

- ✧ Selection of Source Form (required for external requisitions >\$10K)
- ✧ **Vendor quotes when available (2 required for external requisitions >\$50K)
 - ✧ *Competitive quotes are not required for Preferred (SmartBuy) vendor requisitions*
- ✧ W9 or W8Ben/E & Vendor Registration (new vendor & vendor information updates)
- ✧ All contracts, agreements or terms and conditions pertaining to the order
- ✧ ****Pending/In Review: (2 Vendor quotes for external requisitions >\$10K)****

External Requisition Process Overview



How to Create External Requisitions

Important notice: The eCat purchasing system will be unavailable from 9:00PM, Friday, July 18, 2014, to 12:00PM, Sunday, July 20, 2014, for system maintenance. Please plan your eCat purchases accordingly. ✕

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Create requisitions and review purchase orders.

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Requisition Creator Inbox

Find your rejected requisitions; correct and resubmit them for approval.

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Find and display requisitions.

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Close Purchase Orders

Close NB, GR and BL purchase orders; contracts (57xxx) are closed by emailing poccloseout@mit.edu.

Place Personal Orders

Find discounted prices for computers, office supplies, and cell phones

Feedback

Create Requisition — External Vendor

[Procurement Forms](#)

- Selection of Source (For Requisitions > \$10K)
- W9 or W8Ben/E and Vendor Registration Form
- Restricted Item Approval Form
- Independent Contractor Form
- Contract Templates
- Other

Submit Requisition

Reset Form

Created by: Derek K Welcome
 Goods Recipient: Joanner
 Vendor #: 102502
 Tracking #:

Requisition Created for: welcomed
 Unloading Point: MIT Bldg-Rm/Phone: NE49-4122 / 617-253-3515
 Vendor Name/Address: TED PELLA INC, 4595 MOUNTAIN LAKES BLVD, REDDING, CA - 96003
 Please Choose Currency: USD

Vendor Name Search

Change Purchase Order: Is this a change to an existing Purchase Order?
 Yes No

Item Text: Do you want Procurement to send out the Purchase Order to the vendor?
 Yes No

Select "No" if you intend to place the order yourself.

Delivery Text: Example: Attention Vendor: Please deliver next business day, and send an order confirmation to: joanner@mit.edu

Enter any special instructions for the VENDOR.

Internal Note (not printed on PO): Example: Attention Procurement: Please add new vendor. The W9 and Vendor Registration forms are attached.

Enter any special instructions for the PROCUREMENT Dept.

Item Text

10	Item Summary	Distrib	Cost Object	G/L Acct	
Long Text	Description: 4593 Small Screen Basket	100 %	1111000	420214	
	Delivery Date: 08/01/2014				
Clear Item	Material Group: 1460				
	Quantity: 10 EA x 100 USD =		Line Item Total	1,000.00 USD	
20	Item Summary	Distrib	Cost Object	G/L Acct	
Long Text	Description: <input type="text"/>	100 %	1111000	420214	
	Delivery Date: 08/01/2014				
Clear Item	Material Group: 1460				
	Quantity: <input type="text"/> EA x <input type="text"/> USD =		Line Item Total	0.00 USD	
Add Item				Total Requisition	1,000.00 USD

Provide clear description of goods/services (include item # if applicable).

Material Group Search

GL Search

You may distribute the cost of your item on up to as many as 10 cost objects

If the requisition total is greater than \$10,000, complete and attach a Selection of Source Form

Creating a Change Order Requisition

Massachusetts Institute of Technology:

Name: Derek K Welcome

Create Requisition — External Vendor

[Procurement Forms](#)

Click "Submit Requisition" when done.

Submit Requisition **Reset Form**

Created by: Derek K Welcome
 Goods Recipient: *Joanner
 Vendor #: 102502
 Tracking #:

Requisition Created for: *welcomed
 Unloading Point: MIT Bldg-Rm/Phone: 2 *NE49-4122 / 617-253-3515
 Vendor Name/Address: TED PELLA INC
 4595 MOUNTAIN LAKES BLVD
 REDDING, CA - 96003
 Please Choose Currency: *USD

Vendor Name Search

Change Purchase Order: * Is this a change to an existing Purchase Order?
 Yes No
 Please enter the existing Purchase Order number: 4501752136

Item Text: * Do you want Procurement to send out the Purchase Order to the vendor?
 Yes No

Delivery Text:

Internal Note (not printed on PO): Attention Procurement: Incorrect unit price on original order. Please increase the unit price to \$200 each, and email a revised PO to janedoe@tedpella.com. Thank you.

Enter details about the requested change(s).

10	Item Summary	Distrib *	Cost Object *	G/L Acct *
Long Text	Description: *4593 Small Screen Basket	25 %	1111000	420214
	Delivery Date: *08/01/2014	25 %	2222000	420214
Clear Item	Material Group: *1460	25 %	3333000	420214
		25 %	4444000	420214
		Add Line		
Quantity	*10 EA	x*	200 USD	=
		Line Item Total	2,000.00 USD	

GL Account Search

Material Group Search

Creating a Blanket Order

Massachusetts Institute of Technology:

Name: Derek K Welcome

Create Requisition — External Vendor

[Procurement Forms](#)

[Submit Requisition](#) [Reset Form](#)

Created by: Derek K Welcome
 Goods Recipient: * Joanner
 Vendor #: 133437
 Tracking #:

Requisition Created for: * welcomed
 Unloading Point MIT Bldg-Rm/Phone: * NE49-4122 / 617-258-5825
 Vendor Name/Address: PROFESSIONAL STAFFING GROUP
 155 FEDERAL STREET
 BOSTON, MA - 02110
 Please Choose Currency: * USD

Vendor Name Search

Change Purchase Order: * Is this a change to an existing Purchase Order?
 Yes No

Item Text: * Do you want Procurement to send out the Purchase Order to the vendor?
 Yes No

Delivery Text:

Internal Note (not printed on PO): Please create a Blanket PO to pay for a Temp that will be working in our department as an Administrative Assistant, 11/01/2014 - 02/27/2014. The individual will be paid (and we will be invoiced) weekly until 02/27/2014.

It is important to enter the total dollar amount that you plan to spend in the quantity field, and the unit price as \$1.00

10	Item Summary	Distrib *	Cost Object *	G/L Acct *
Long Text	Description: * Temporary Help			
	Delivery Date: * 02/27/2014	50 %	1633357	420262 H
Clear Item	Material Group: * 1140 H	50 %	1633358	420262 H
				H
		Add Line		
	Quantity: * 5000 EA H x * 1 USD =		Line Item Total	5,000.00 USD

Search/Display Your Requisitions

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Click here to:

1. Search/View Requisitions
2. Add/View Attachments

Feedback

Enter Search Criteria

Massachusetts Institute of Technology: Display Requisitions

Name: Derek K Welcome

Search for Requisitions

Enter the search criteria for the requisition you want to display. You can enter single values or ranges of values.


If the search only finds one match, you'll be brought directly to that document. When you have entered the criteria, click the **Search** button.



Header Selections

Purchase Requisition to

Creator

Creation Date to

Vendor Number 

Plant/Int.ServiceProvider  to 

Account Assignments

Cost Object

GL Account 

Profit Center

Fund Center

Only released reqs

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Display Requisition

Display Purchase Requisition

FOR DISPLAY ONLY. NOT A LEGAL PURCHASE ORDER DOCUMENT.

[Return to Search Results](#) [New Search](#) [SAP](#) [Print this Page](#)

[Attach Document](#)

Click here to browse/attach forms/documents

Requisition #:	0011943088	Date created:	10/20/2014
Related PO:		Date PO Generated:	
Created by:	DMONTANA	Requisition created for:	dmontana
Goods recipient:	dmontana	Unloading point:	2-216/2-2243
Vendor #:	101470	Vendor name/address:	SPECTROCELL INC 143 MONTGOMERY AVE BOX#33 ORELAND PA 19075-1810
Agent Name/Commodity:	Catelin Bonvie		
Agent phone number:	617-253-8345		

Procurement Contact

Rejection Text:

Item Note:

Delivery Text:

Item Information

Items 1 to 2 of 2 [first](#) [previous](#) [next](#) [last](#)

Item	Short Text (description)	Qty. Req.	Unit of Meas	x	Unit Price	=	Total Price	Distrib. Amount	Cost Obj to Charge	G/L Acct to Charge
10	R-4001-T screw-top NIR cells	2.000	EA	x	237.44	=	474.88	474.88	6927347	420214
20	A-6105, bag of 6 PTFE threaded caps	1.000	EA	x	31.27	=	31.27	31.27	6927347	420214
Total Requisition:								506.15 USD		

When this icon is present, your requisition requires approval before it can be processed. Click the icon for a list of authorized approvers.

= Item successfully approved.

= View person(s) who received the line item in their inbox.

Browse and Attach Documents

Massachusetts Institute of Technology: Display Requisitions

Name: Derek K Welcome

Attach Document to Requisition 0011907646

4 **Return to Requisition** 3 **Attach Document** 1

Choose file description: * Choose one [v] 2 **Browse...**

Choose file to attach: * [] **Browse...**

doc, docx, gif, pdf, txt, xls, xlsx, under 2MB



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Choose one

- Selection of Source Form
- Vendor Quotes
- Vendor Proposal/Agreement
- Statement of Work
- Independent Contractor Documents
- Vendor W9 Tax Form
- Vendor Registration Form
- Other

- Selection of source form when requisition is >\$10K
- Vendor quotes (when available, two required if >\$50K)
- Vendor proposals/agreements/contracts
- Statement of work
- Independent Contractor documents
- W9 or W8Ben/E & Vendor Registration form for
 - New vendors
 - Vendor information changes (address etc.)
- Other/vendor terms & conditions

Selection of Source & Price Justification

- Required for compliance
- Written quotes above \$50 k
- Explanations go a long way!
- Mac Preview does not work
- Competitive Quotes are not required when purchasing from SmartBuy Vendors 😊!

MIT Selection of Source & Price Justification **VPF**
Requisitions exceeding \$10,000

Note: Mac Preview is not compatible with this form. Please use Adobe Reader or Adobe Acrobat Pro.

Requisition Number:

Selection of Source: MIT requires vendor and price justification for requisitions exceeding \$10,000. Please complete this form to explain why this bid was selected and how a reasonable price was determined.

Written quotes must be attached:

- Whenever available, regardless of purchase price;
- When the requisition does not include a clear and precise description of what is being purchased;
- Always when the purchase price exceeds \$50,000.

To complete this form, save a copy to your computer and attach it to the requisition once it has been created in SAPweb.

Websites: Learn more about document attachment in SAPweb and SmartBuy.

Section 1: Please list the vendors that you researched and the pricing that was provided.

Selected Bid	Vendor Name	Total Price
<input type="radio"/>		
<input type="radio"/>		
<input type="radio"/>		

Section 2. Why did you choose this vendor? (select one)

Select your primary choice from the dropdown menu

Section 2a. Provide further explanation based on section 2.
Additional information will be required.

(Section 2 explanation space)

Section 3. How did you determine that the price was reasonable? (select one)

Select your primary price determination criteria from the dropdown menu

Section 3a. Provide further explanation based on section 3.
Additional information will be required.

(Section 3 explanation space)

Requisitioner's Signature

Form 2.5A (3/2013) For questions, please email procurement@mit.edu.

View/Display Your Purchase Orders

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Click here to:

1. Search purchase order history
2. View payment history
3. View/Print purchase orders/invoices
4. View/Print attachments
5. View line item status (Open/Closed)

Feedback

Enter Search Criteria

Massachusetts Institute of Technology:

Name: Derek K Welcome

Search for Purchase Order

Search by Unique ID

PO Number

Requisition #

--- or ---

Search by Value

Requisition # to

Tracking #

Creation Date to

Vendor #

Plant


Agent Code

Cost Object

G/L Account

Profit Center

Fund Center

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Display Purchase Order Options

Massachusetts Institute of Technology:

Name: Derek K Welcome

Display Purchase Order

FOR DISPLAY ONLY. NOT A LEGAL PURCHASE ORDER DOCUMENT

[▶ New Search](#)
[Print this Page](#)
[Display Invoice/Payment History](#)
[Display PDF](#)

View Attachments

PO Number	4501754556	Date Created	03/21/2014
Goods Recipient	Luca Alloatt	Requested Delivery Date	03/21/2014
Vendor Number	153035	Unloading Point	26-428/617-253-2531
Tracking Number		MIT Bldg-Rm/Phone	
PO Created by	WELCOMED	Vendor Name/Address	DMARK CORPORATION DMARK CORPORATION 10552 HUMBOLT STREET LOS ALAMITOS, CA 90720
Purchasing Group Code	106		

Delivery Info
MIT Stata Center
32 Vassar Street
Cambridge, MA 02139-4307

Internal Note
Please deliver to Luca Alloatti in Lab 26-428
Vendor# 153035, DMARK Corporation 10552 Humbolt St, Los Alamitos, CA 90720 Tel (562)799-9010, Contacts; Carmen Soproni and Lina McGuire.
Quoted price for purchase attached.
Updated W9 <(>&<)> Vendor Registration attached.

Line Item Summary

Item #	Description	Mat Grp	Qty	Unit	x	Unit Price	=	Total Price	Distrib	Cost Object	G/L Acct	Req. No.	Line Closed
10	XSSC1350-1002 SC Series Cabinet 161 Com	1010	1	EA	x	2,022.75	=	2,022.75	2,022.75	2746279	421827	0011854950	X
20	XSSC1350-1017 SC Series Cabinet 206 Com	1010	1	EA	x	2,117.10	=	2,117.10	2,117.10	2746279	421827	0011854950	X
Total PO								4,139.85	USD				

Display/Print Purchase Order:
Currently available for PO's that begin with "45" (only).

View Requisition & All Attachments

Line Item Status

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Display Invoice/Payment History

Massachusetts Institute of Technology:

Name: Derek K Welcome

Display PO: Display Invoice/Payment History

Questions: accounts-payable@mit.edu

[Return to Display PO](#) [Print this Page](#)

PO Number	4501754556	Vendor Name/Address	DMARK CORPORATION DMARK CORPORATION 10552 HUMBOLT STREET LOS ALAMITOS, CA
Total PO Amount	\$4,139.85		
Open Balance	\$.00		

Invoice/Payment Information

SAP Doc Number	Vendor Invoice Number	Posting Date	Invoice Date	G/L Acct	Cost Object	Distrib Amount	Total Invoice Amount	Actual or (Planned) Payment Date	Check Number	Attachment
5103819112	1421630	05/05/2014	04/14/2014	421827	2746279	\$4,139.85	\$4,139.85	05/12/2014	31259395	View Invoice
Invoices Received to Date							\$4,139.85			
Open Balance							\$.00			

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How to Close Purchase Orders

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Note: This task is generally performed by the person who manages your departmental MIT Detailed Transaction Report (DTR).

Feedback

Enter and Process PO Closeout


MIT: Purchasing

Name: Derek K Welcome

Purchase Order Close

Enter all purchase orders you wish to close except Contracts (57xxx). Contracts are closed by emailing the request to pocloseout@mit.edu

4501766018 x

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Internal Requisitions



In-House Services

Purchase items and services from various internal service providers such as:

- ✧ Audio/Visual Services
- ✧ Copy Center
- ✧ Catering Services
- ✧ Cryogenic Laboratory Operation
- ✧ Certain IS&T services
- ✧ Mail Services
- ✧ MIT Press Bookstore
- ✧ MIT Museum Facility Rental

Create Internal Provider Requisition

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Click here to purchase services (A/V, Catering, etc.) from MIT's internal providers.

Feedback

Internal Provider Requisition

Massachusetts Institute of Technology:

Name: Derek K Welcome


Note: The internal requisition number generated will be used for ordering and billing purposes.

Internal requisitions do not receive MIT purchase order numbers.

Create Requisition — Internal Provider

[Procurement Forms](#)





Submit Requisition **Reset Form**

Created by	<input type="text" value="Derek K Welcome"/>	Requisition Created for *	<input type="text" value="welcomed"/>
Goods Recipient *	<input type="text" value="welcomed"/>	Unloading Point	<input type="text" value="NE49-4122"/> / <input type="text" value="617-258-5825"/>
Internal Provider # *	<input type="text" value="5000"/>	MIT Bldg-Rm/Phone	
		Internal Provider Name	Audio/Visual Services 77 Massachusetts Avenue Cambridge, MA - 02139-4307
Tracking #	<input type="text"/>		

Search/Select an Internal Provider

Delivery Text

Internal Note (not printed on PO)

10	Item Summary	Distrib *	Cost Object *	G/L Acct *
Long Text	Description *			
	<input type="text" value="A/V Services for Seminar (NE49-4122)"/>			
	Delivery Date *	<input type="text" value="100"/>	<input type="text" value="1633507"/>	<input type="text" value="420106"/>
		%		
Clear Item		<input type="text"/>	<input type="text"/>	<input type="text"/>
		%		
		<input type="text"/>	<input type="text"/>	<input type="text"/>
		%		
		Add Line		
Quantity *	<input type="text" value="1"/> EA  x *	<input type="text" value="500"/>	=	Line Item Total <input type="text" value="500.00"/>

Personal Purchases

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MIT employees can use their personal credit card to buy products from Staples, Apple, Dell and others at MIT's discounted pricing!

Feedback

Financial Considerations

Important Terms

- **Cost Objects:** Uniquely assigned (7 digit) numbers that classify which funding source(s) will be paying for the goods/services. Each funding source has unique requirements:
 - For Federally funded projects (WBS elements), contact your MIT Office of Sponsored Programs (OSP) representative for more information <http://osp.mit.edu/about-osp/staff/by-department>
 - For all other funding sources, contact VPF Financial Accounting & Reporting for more information http://vpf.mit.edu/index.php/site/financial_accounting_reporting/staff
- **GL (General Ledger) Account Numbers:** G/L Account numbers classify what you are buying for reporting purposes. The accuracy of MIT's financial data depends on the accuracy of GL account designations. Contact VPF Financial Accounting & Reporting for more information http://vpf.mit.edu/index.php/site/financial_accounting_reporting/staff
 - **Unallowable GL Accounts:** Unallowable GL accounts **are not authorized for use on federally funded projects (i.e. funding source)**. Contact John Larkin (Senior Accounting Officer, MIT Accounts Payable, jlarkin@mit.edu), or your OSP representative for more information <http://osp.mit.edu/about-osp/staff/by-department>
- **Material Group:** Classifies products/services by commodity or service type for financial reporting and workflow approval purposes (e.g. 1930 – Radioactive Materials)

Unallowable GL Accounts

Accounts Payable Search

[Advanced Search](#)

[Policies & Procedures](#)

[Forms](#)

- [Payments via Foreign Draft](#)
- [Request for Replacement Tax Information](#)
- [Electronic Invoicing](#)
- [Process Overview](#)
- [Purchase Order Invoices: Approval and Rules](#)
- [Requests for Payment](#)
- [Unallowable Costs](#)
- [Wire Payments](#)
- [Human Subject Payments](#)

Unallowable Costs

OMB Circular A-21 prohibits the charging of certain "unallowable" costs to Federally sponsored agreements. To avoid cost disallowances on sponsored agreements, the following GL accounts will not be allowed as charges to a WBS element (Cost Object).

420080	Travel-Unallowable Cost
420166	Entertainment
420254	Non-Reimbursable Expenses
420302	Promotion & Memorabilia
420304	Public Relations
420306	Publicity
420318	Recreation Related Expense
421205	Alcoholic Beverages
421584	Memberships and Dues-Social

In certain situations a sponsor may permit the charging of costs that would otherwise be unallowable. In these cases, the use of a GL account other than those listed above is recommended.



Equipment GL Account Coding

Expense	Cost	GL Designation	GL Account
Equipment	\$5000 or More	Major Equipment	421818
Equipment	\$1000 - \$4999	Minor Equipment	421827
Computer Equipment	<\$1000	Computer Supplies/ Peripherals	421900
Office Equipment	<\$1000	Office Supplies	420258
Laboratory Equipment	<\$1000	Materials and Services	420226
Equipment Maintenance/Repairs	All Equipment Repairs	Maintenance & Repairs	420220

Equipment: **Any item that will last more than a year, is operationally complete and can be identified as stand-alone is considered equipment.** Purchases from the following product categories are normally considered equipment: furniture, computer, laboratory, scientific and test equipment, office and service equipment. The difference between capital (Major) and Minor equipment is determined by cost. Computer equipment at MIT is controlled by property record beginning at a cost of \$1000 or greater.

Detailed Procedure at: <http://vpf.mit.edu/site/property> (**Policy & Procedure 2.0, Coding of Equipment Purchases**). Please direct questions regarding these designations to Jo-Anne Chute ext. 8-8448, or e-mail jchute@mit.edu.

Additional Resources

Most Commonly Used GL Accounts

GL Account	GL Name	GL Definition
421205	Alcoholic Beverages (Unallowable GL)	Use for any purchase of alcoholic beverage to allow for proper exclusion from billings to federal and other sponsors who do not reimburse these expenditures. . An unallowable GL account -- may not be charged to federally sponsored projects.
420102	Animal Care	All expenditures for animal care. Excludes the cost of animal purchases -- see G/L Account 420104
420104	Animal Purchases	The cost of live animals purchased for laboratory use. Excludes the cost of animal care -- see G/L 420102
420106	Audio Visual Expense	All audio visual expenses, including services provided by MIT's AV department or by outside vendors.
420800	Books & Publications	Purchases of Books or Publications
420128	Chemicals	Chemical purchases for laboratory or facilities use
421900	Computer supplies & peripherals	Use for computer supplies and computer equipment with costs less than \$1000
420140	Conference Expenses	Fees paid for attendance by MIT employees at conferences held outside of MIT. Do not use for expenses related to the cost of conferences offered by MIT (use Workshop/Seminar/Conference costs), or for professional development expenditures (use Professional Development)
420720	Contract Services	Purchased services (not including temporary services, professional services, legal services)
420392	Copying Expense	Cost of copying
420160	Electrical Components	Expenditures for electrical components for fabricated equipment or in other research or teaching applications.
420166	Entertainment (Unallowable GL)	For costs of various forms of entertainment (for example, tickets to shows or sports events, meals, lodging, rentals, transportation, and gratuities). Also for indoor floral arrangements, regardless of the purpose of the function. An unallowable GL account -- may not be charged to federally sponsored projects.

Most Commonly Used GL Accounts

GL Account	GL Name	GL Definition
421818	Equip/Furniture-Major-not MTDC	Capitalizable equipment and furnishings with an acquisition cost of \$5,000 or more
421827	Equip/Furniture-Minor	Equipment and furnishings between \$1000 and \$4,999. Not capitalized
421833	Equipment Rental-not MTDC	Costs of renting equipment for use in MIT research, instruction, or administrative work.
421572	Experimental Subjects	Used for the cost of participants in research, when F&A charges are allowed on participant costs.
420286	Facilities/Physical Plant Exp-not MTDC	Used for corrections to system generated entries to 600600, 600601, 600602, and 600603, Facilities charges.
421305	Fees - Administrative	Administrative Fees -- generally an internal allocation.
421200	Food	Purchases of food for MIT activities & events (not including meetings -- for meetings, use 421000, "Meetings-Food & Beverage".)
420198	Insurance Premiums	Insurance costs, including the cost of insuring equipment in transit when not billed as part of the original invoice.
420214	Laboratory Supplies	Laboratory supplies, including glassware. (Use 420128 for purchases of chemicals for laboratory use).
420220	Maint & Repairs & Reconditioning	Expenditures to maintain MIT buildings and equipment of all types in proper operating condition or to restore equipment to proper operating condition. Not capitalized
420232	Mechanical Components	Expenditures for mechanical components for fabricated equipment or in other research or teaching applications.
421000	Meetings - Food & Beverages	Use for the purchase of all food and/or beverages associated with a meeting. Not recoverable on federally sponsored projects unless allowed by the specific award.



Most Commonly Used GL Accounts

GL Account	GL Name	GL Definition
421010	Meetings - Materials & Supplies	Use for materials and supplies purchased for meetings. Treated as recoverable on federal awards unless not allowed by the specific award.
421753	Non-IS Telephone & Network Charges	Used for payments made directly to phone vendors, or for reimbursement of MIT staff who maintain a phone line at home for MIT purposes.
420258	Office Supplies	Office supplies such as file folders, paper clips, stationary. Can be used for office furnishings and equipment under \$1000
420274	Parking Expense-not MTDC	Cost of parking passes purchased by MIT departments, labs and centers
420920	Postage Mailing and Shipping	Used for the costs of postage, mailing, and shipping. Can be for US Mail or another carrier (UPS, DHL, et cetera).
420319	Prizes & Awards-Other	Used for prizes & awards. For prizes and awards subject to income tax, use 400800, "Prizes & Awards Compensation". This is an unallowable GL
420131	Prof Development/Training	Expenditures for professional development, including conference fees, training classes (MIT or non-MIT), seminars.
420298	Professional Services/Consulting	Auditing & other professional services. For legal fees, use 421316.
420302	Promotional & Memorabilia (Unallowable GL)	Used for costs of promotional items and memorabilia. For event publicity, use 420306. An unallowable GL account -- may not be charged to federally sponsored projects.
420314	Record Project Overrun-not MTDC	Used to transfer an over-run from a sponsored wbs element to the cost center or fund account which is providing the funding for the overrun.
420318	Recreation Related Expenses (Unallowable GL)	Used for expenses relating to employee morale, such as holiday parties, flowers for sickness or bereavement, equipment or supplies for office sporting or picnic events, and similar items. Limited by MIT policy to \$15 per employee per year from general funds. An unallowable GL account -- may not be charged to federally sponsored projects.
420133	Recruiting/Placement Fees	Recruitment/Placement fees related to hiring of staff



Most Commonly Used GL Accounts

GL Account	GL Name	GL Definition
420321	Rewards & Recognition	For costs of non-taxable rewards & recognition for support, research, and administrative staff. Do not use for prizes and awards for faculty and students for faculty and students. Use 420319. For taxable rewards & recognition, use 400800.
420344	Seminar/Workshop/Conference Costs	Costs of seminars, workshops, and other special event programming offered by MIT. For the cost of conferences and seminars attended by MIT employees, use "Conference Expense", 420140
420338	Service Contracts	Maintenance contracts on office, lab, scientific, and shop equipment
421925	Software	Expenditures for purchased computer software including operating systems and applications (but, the original operating system purchased with a computer is part of the computer purchase.)
420890	Subscriptions	Subscriptions for newspapers, magazines, or other periodicals
420262	Temporary Help	Expenditures for temporary services for individuals not filling budgeted vacancies.
420050	Travel Expenses	Transportation, Lodging, and meal expenses on MIT Business away from campus.
420070	Travel-Foreign Expenses	Transportation, lodging, and meal expenses on MIT business outside of the U.S.

Please visit VPF Financial Accounting and Reporting for a more comprehensive list of current GL accounts:

https://vpf.mit.edu/index.php/site/content/download/2753/13872/file/Web_GLdefs_Aug2009.pdf

Training Resources

In-Class Training

- Procurement/Finance/SAP: http://vpf.mit.edu/site/calendar_schedules/calendar
- eCat: <http://ecat.mit.edu/>

Online (At Your Desktop)

- Procurement Overview:
<https://sbsjp601.mit.edu/irj/portal/learning?course=ADM10280w>
- Requisition Process Overview:
<https://sbsjp601.mit.edu/irj/portal/learning?course=ADM10290w%20>
- Buying Process Overview: <http://learn2buy.mit.edu/>
- eCat: <http://ecat.mit.edu/training>

Who to Contact



Procurement Manager

Rositha Durham
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Computers & Technology

Bill Akerberg
617-253-5499
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Scientific & Lab Supplies

David Petricone
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Furniture

Stephen Newman
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Marketing & Communications

Minerva Tirado
617-258-9310
minerva@mit.edu



Who to Contact



Travel

Jimmy Kontoravdis
Bourdon
617-253-2756
jravdis@mit.edu



Equipment Over \$50K

Ann Julian
617-253-8350
amjulian@mit.edu



Office Supplies, Temporary Help

Derek Welcome
617-253-5825
welcomed@mit.edu



Gas, Bulk Cylinders

Andrew Barnes
617-253-8362
apbarnes@mit.edu



Procurement Card

Kim Harmon
617-253-8360
kharmon@mit.edu

Questions?



Negotiating the most favorable terms and conditions

Contracts

Complex Contracts Group

- ✧ Review Terms & Conditions associated with the purchase of a good or service
- ✧ Create purchase order contracts for professional services using MIT's Terms & Conditions.
- ✧ Review many different types of contracts outside of SAP, including major projects, software, database, equipment, maintenance, leases, events, hotel.
- ✧ Note: Purchase orders beginning with a “57” are used to create purchase order contracts for professional services

Requisitions

- ✧ Back up as required (electronic preferred)
 - ✧ Statement of Work/Description of Services
 - ✧ Period of performance
 - ✧ Method of payment/contract type
 - ✧ Vendor proposal(s) or quote(s)
 - ✧ Look for hidden terms and conditions
 - ✧ Selection of Source/Justification of Price
- ✧ W-9 or W-8Ben, and vendor registration form

Requisitions Cont.

Independent Contractors:

- ✧ Approval process – form, resume, client list
- ✧ Recertification required every two years
- ✧ Alternatives: MITemps, payroll
- ✧ Critical as enforcement of regulations intensifies.
- ✧ Potential penalties to MIT include fines, de-certification of procurement process

Negotiating the Contract

Terms and Conditions:

- ✧ MIT Terms and Conditions are the negotiating tool of choice.
- ✧ Much longer process if negotiating from vendor's Terms and Conditions.
- ✧ Large vendors usually want to use their own Terms and Conditions
- ✧ Note: To protect you and the interests of MIT, all contracts between MIT and vendor should be reviewed and signed by Procurement.

Terms & Conditions Pitfalls

- ✧ Limitation of Liability (Indemnification and Hold Harmless)
- ✧ Contractor Warranty on Service & Equipment
- ✧ Rights in Deliverables (intellectual property rights in general)
- ✧ Insurance Requirements (Insurance Certificate)
- ✧ Governing Law
- ✧ Payment Terms
 - ✧ MIT standard is Net 30 after receipt of invoice
 - ✧ Final payment after acceptance of goods (installation/testing) or services

Terms & Conditions Pitfalls

- ✧ Confidentiality: FERPA, PIRN
- ✧ Software Licenses (IP rights, third-party infringement)
- ✧ Government Terms
- ✧ Auto Renewal (Evergreen)

Request for Proposals

- ✧ RFP – (sample available on procurement website)
- ✧ Cover Letter
 - ✧ Specifications/Statement of Work
 - ✧ Instructions for Proposal Preparation
 - ✧ Evaluation criteria
 - ✧ Terms & Conditions (MIT)
- ✧ Award process: negotiate the contract while in a competitive environment

Contracts Team



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Thank You For Joining us!

How can we best support you?

Questions, Discussion

