

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 Atlas logo is on the left, and navigation links for HOME, ABOUT ME, and CAMPUS LIFE are in the center. On the right, there is a user profile icon and the text 'welcomed'. A dropdown menu is open, showing options: Settings and Authorizations (selected), Submit Feedback, For Emergencies, Help Desk, and Log Out. On the left, a 'MENU' sidebar is visible with items like Time and Vacation Entry, Buying, My Reimbursements, Service Requests, Training, and Event Planning. The main content area features a banner for 'Gifts to MIT: It's all in the processing' and two featured links: AdminConnect and MIT Homepage. The footer includes the MIT logo and contact information, along with social media icons.

Select/Save Settings

Menu

- MY PROFILE *(certificate required)*
 - Personal Information
 - Settings and Authorizations**
- MY BENEFITS
 - Benefits
 - Commuting Benefits
 - Discounts and Perks
- MONEY MATTERS *(certificate required)*
 - Paystubs
 - W-2s
 - Tax Withholding
 - Direct Deposit Preferences

Settings and Authorizations Help

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 Atlas

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](#).

View your spend authority

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](#).

Your Authorizations



Roles DB Authorizations for WELCOMED

Derek Welcome, employee, Procurement

Function Category	Function Name	Qualifier Code	Do function	Grant	Effective Today	Click for Details
SAP	REPORT BY CO/PC	0HPC00_MIT	Y	N	Y	*
TNET	ADMIN PHONE PREF BY NET ID	0004F21584BD	Y	Y	Y	*
TNET	ADMIN TELEPHONES BY PHONE NO.	617-258-5825	Y	Y	Y	*
TRNG	COURSE INSTRUCTOR	NULL	Y	N	Y	*
VPF	PROCUREMENT BUYER AND SOURCING	NULL	Y	N	Y	*

[Back to main Roles web interface page](#)

Click here to view who can commit/approve funds on departmental cost objects

Departmental Authorizations



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"

Purchasing Products and Services

Not Sure Where to Buy?

MENU ?

edit ✎

Time and Vacation Entry

Buying

My Reimbursements

Service Requests

Training

Event Planning

☰ FULL CATALOG

Buying



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, Sodexo 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

Preferred Suppliers

Learning to Buy

eCat Help

Training: Online and In-person

Sourcing & Procurement

Buying FAQ

Preferred Vendor Search Options

Sourcing & Procurement

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

Sourcing & Procurement

[Policies & Procedures](#)

[Forms](#)

[Resources](#)

[SmartBuy](#)

- [About SmartBuy](#)
- [Preferred 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

Enter Supplier Name Here [Preferred Supplier List](#)

Travel Vendors

Purchase method

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.

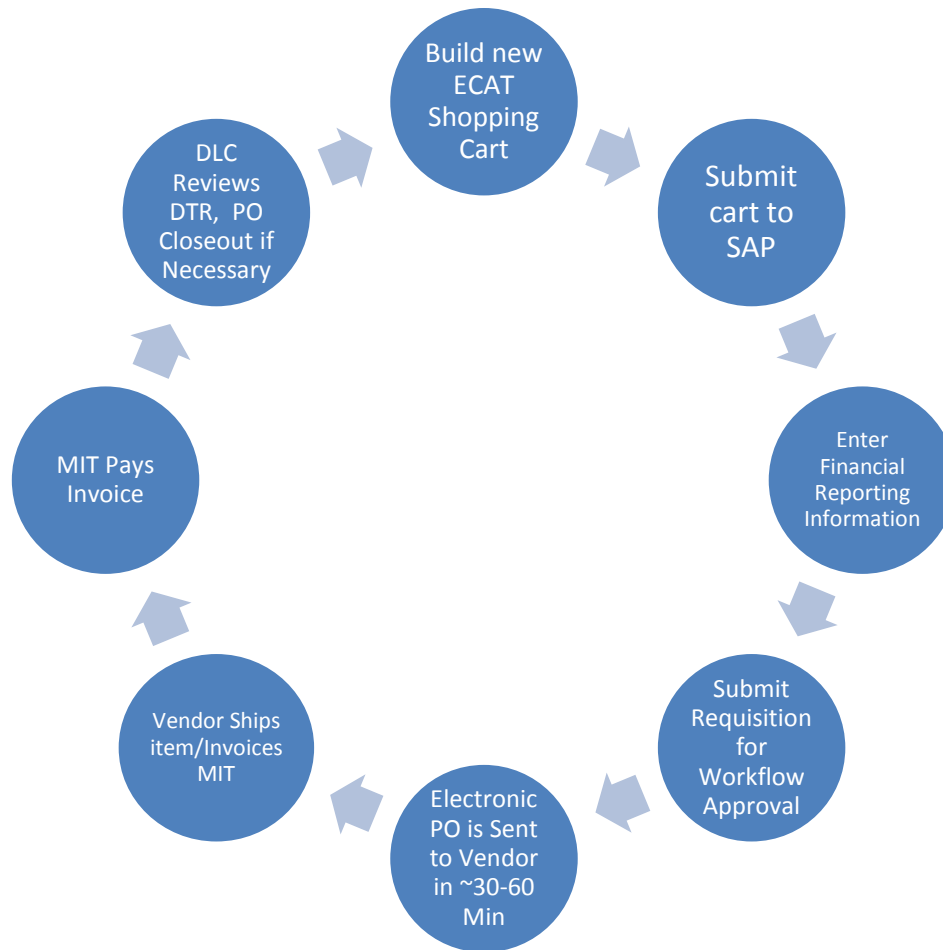
eCat via Atlas



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>

The screenshot shows the Atlas website interface. At the top, there is a navigation bar with the Atlas logo and the tagline 'navigating your MIT world'. The navigation menu includes 'HOME', 'ABOUT ME', and 'CAMPUS LIFE'. On the right side of the navigation bar, there are icons for a user profile and a 'welcomed' dropdown menu.

The main content area is titled 'Buying' and contains the following sections:

- Buying**: Create requisitions and review purchase orders.
- eCat (Electronic Catalog)**: Create requisitions for eCat vendors. (This option is highlighted with a blue box and a callout line from the 'Buying' menu item in the left sidebar.)
- 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 poccloseout@mit.edu.
- Place Personal Orders**: Find discounted prices for computers, office supplies, and cell phones.

On the right side of the main content area, there is a sidebar titled 'Additional Resources' with the following links:

- Procurement Forms
- SmartBuy
- Preferred Suppliers
- Learning to Buy
- eCat Help
- Training: Online and In-person
- Sourcing & Procurement
- Buying FAQ

The left sidebar contains a 'MENU' section with the following items:

- Time and Vacation Entry
- Buying** (highlighted with a blue box and a callout line pointing to the 'eCat (Electronic Catalog)' option in the main content area)
- My Reimbursements
- Service Requests
- Training
- Event Planning
- FULL CATALOG

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](#)

Save

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

2 Select Addresses for Profile

Select an address to edit

No addresses defined in profile.

Shipping Addresses

Address Search

Nickname / Address

Text

Results Per Page

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
<input type="button" value="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

Ship To **Bill To**

Select an address to edit

Billing Addresses

Select Address Template

Select Address Template

Accounts Payable
MIT_LL AP

2

3

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

Default

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
- BovConnection
- Grainger
- Mckesson Medical Surgical
- Airgas
- Ambit Creative Group
- Apple
- Creative Office Pavilion
- Dell
- KI Office Furniture
- Red Thread
- Sigma Aldrich
- Thorlabs
- FedEx NEW Account SignUp CAMPUS ONLY
- FedEx Existing Account - TO SHIP

Lab and Research Suppliers

- Agilent Life Sciences
- Airgas
- Alfa Aesar
- Beckman Coulter
- Sigma Aldrich
- Thorlabs

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: 2014-07-18 welcomed 01

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	
1 Post-it Self-Stick Easel Pad, 30 Sheets, White, Unruled, 30"H x 25"W, 6/Ct more info...	760951	PK	94.95	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

No POs for this

Go

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: [Remove Selected Items](#) [Go](#)

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	
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	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

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 #	60445762	Recipient's Email Address	welcomed@mit.edu
Vendor #	165227	Vendor Name	STAPLES ECAT ONLY

Delivery Text: Punchout

Internal Note (not printed on PO):

Line Item Information

10	Item Summary	* Distrib	* Cost Object	* G/L Acct
Description	Post-it Self-Stick Easel Pad, 30 Sheets			
SKU/Part #	760951	100%		
Delivery Date	03/31/2015	0%		
* Material Group		0%		
Quantity	1 PK x \$94.95	=		Line Item Total \$94.95
				Total Requisition \$94.95

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

Submit Requisition Clear Form

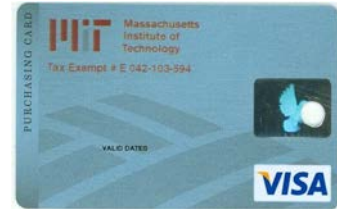
Procurement Card



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
All chemicals	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 and chemicals 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

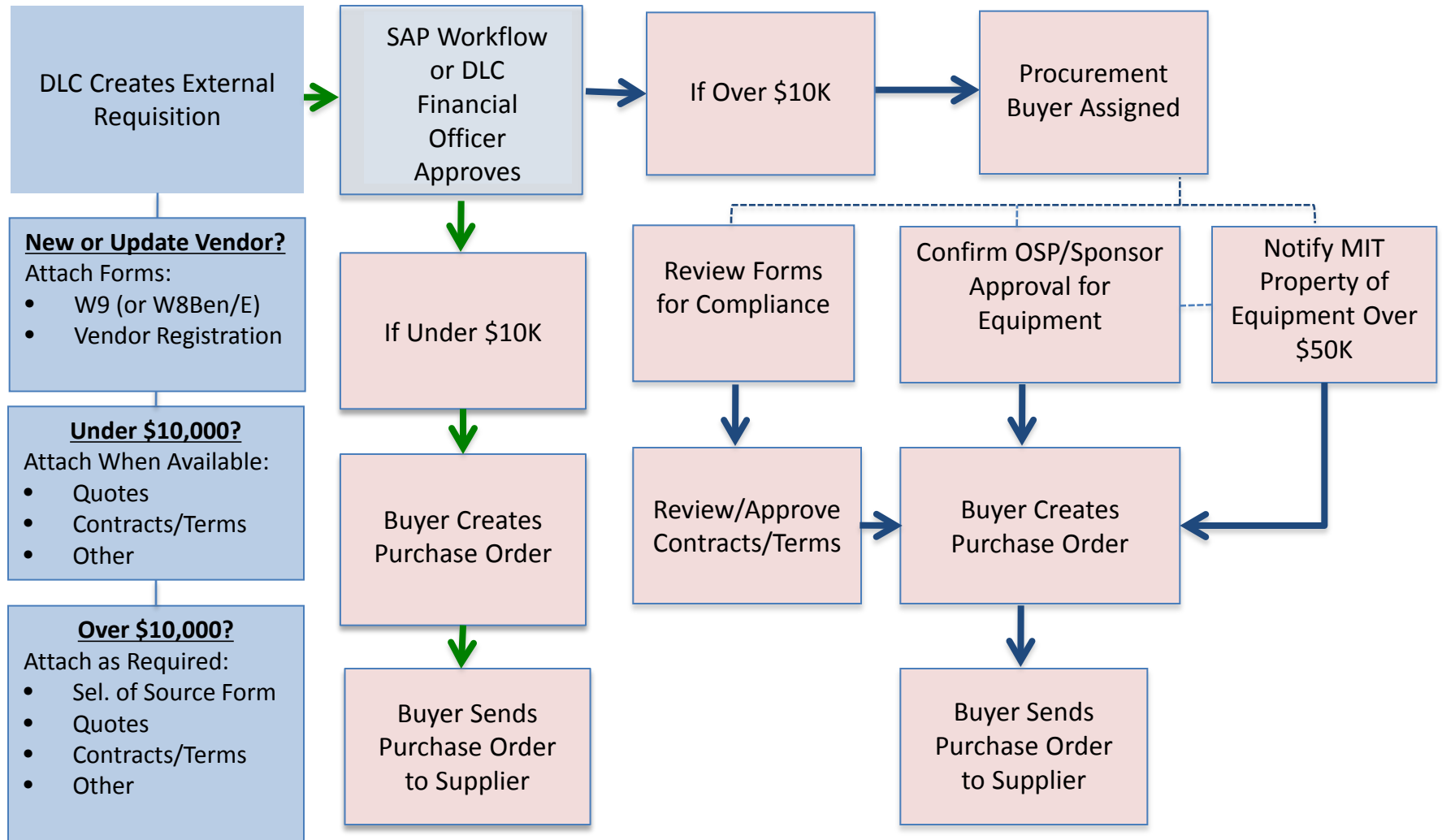
Data Entry

- ✧ 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

External Requisition Process Overview



How to Create External Requisitions

MENU ? edit ✎

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

🗪 FULL CATALOG

Buying

Create requisitions and review purchase orders.

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Additional Resources

[Procurement Forms](#)

[SmartBuy](#)

[Preferred Suppliers](#)

[Learning to Buy](#)

[eCat Help](#)

[Training: Online and In-person](#)

[Sourcing & Procurement](#)

[Buying FAQ](#)

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: 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

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

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

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

Enter any special instructions for the VENDOR.

Enter any special instructions for the PROCUREMENT Dept.

Item Text	Item Summary	Distrib	Cost Object	G/L Acct
10	4593 Small Screen Basket	100 %	1111000	420214
Quantity: 10 EA x 100 USD	Line Item Total: 1,000.00 USD			
20		100 %	1111000	420214
Quantity: x USD	Line Item Total: 0.00 USD			
Total Requisition				1,000.00 USD

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

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**

1

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

Requisition Created for: *welcomed
 Unloading Point: *NE49-4122 / 617-253-3515
 Vendor Name/Address: TED PELLA INC
 4595 MOUNTAIN LAKES BLVD
 REDDING, CA - 96003

2

3

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

4

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

5

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.

6

Enter details about the requested change(s).

7

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	

Material Group Search

GL Account 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 Requisition Created for
 Goods Recipient Unloading Point MIT Bldg-Rm/Phone /
 Vendor # Vendor Name/Address
 Tracking #
 Please Choose Currency

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)

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 *
<input type="button" value="Long Text"/>	Description <input type="text" value="Temporary Help"/>			
	Delivery Date <input type="text" value="02/27/2014"/>	<input type="text" value="50"/> %	<input type="text" value="1633357"/>	<input type="text" value="420262"/> <input type="button" value="H"/>
<input type="button" value="Clear Item"/>	Material Group <input type="text" value="1140"/> <input type="button" value="H"/>	<input type="text" value="50"/> %	<input type="text" value="1633358"/>	<input type="text" value="420262"/> <input type="button" value="H"/>
		<input type="text" value=""/> %	<input type="text" value=""/>	<input type="text" value=""/> <input type="button" value="H"/>
		<input type="button" value="Add Line"/>		
	Quantity <input type="text" value="5000"/> EA <input type="button" value="H"/> x <input type="text" value="1"/> USD =	Line Item Total		<input type="text" value="5,000.00"/> USD

Search/Display Your Requisitions

The screenshot shows the Atlas system interface. At the top, there is a navigation bar with the Atlas logo (navigating your MIT world) and links for HOME, ABOUT ME, and CAMPUS LIFE. On the right, there is a user profile icon and the text 'welcomed'. Below the navigation bar, there is a 'MENU' dropdown on the left with an 'edit' icon. The menu items are: Time and Vacation Entry, **Buying** (highlighted with a blue box and arrow), My Reimbursements, Service Requests, Training, Event Planning, and FULL CATALOG. The main content area is titled 'Buying' and contains the following sections:

- Buying**
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** (highlighted with a blue box and arrow)
Find and display requisitions. (& Add/View Attachments)
- 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

On the right side of the main content area, there is an 'Additional Resources' section with the following links:

- Procurement Forms
- SmartBuy
- Preferred Suppliers
- Learning to Buy
- eCat Help
- Training: Online and In-person
- Sourcing & Procurement
- Buying FAQ

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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Need help? Review our [contact information](#) for technical support and other resources.

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 2 Choose file to attach: * Browse... doc, docx, gif, pdf, txt, xls, xlsx, under 2MB



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Need help? Review our [contact information](#) for technical support and other resources.

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

Requisition Number:

MIT requires documented vendor and price competition for requisitions exceeding \$10,000. Please complete Sections 1 and 2 of this form to explain the bidding process 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;
- When the purchase price exceeds \$50,000.

Please complete this form, save a copy to your computer, and then attach it to the Atlas requisition number shown above.

Section 1: Please list at least 2 vendors that you considered and the pricing that was provided.

Vendor Selected	Considered Vendors	Total Price
<input type="radio"/>		
<input type="radio"/>		
<input type="radio"/>		

Section 2: Why did you choose the selected vendor? (select one)

2.1 MIT Preferred Vendor, must be listed on [SmartBuy](https://vpf.mit.edu/site/sourcing_procurement/smartbuy/suppliers). SmartBuy vendors can be found at: https://vpf.mit.edu/site/sourcing_procurement/smartbuy/suppliers
No further explanation required.

2.2 Adequate price competition (at least 2 quotes): lowest bidder selected
No further explanation required. In Section 1, list all considered vendors and their prices.

2.3 Adequate price competition (at least 2 quotes): other than lowest bidder selected
In Section 1, list all considered vendors and their prices. Justify the higher price by explaining below why the additional costs are considered reasonable and beneficial to MIT.

(Additional explanation space on page 3 if needed)

2.4 Procurement by a non-competitive method for this product/service

A "procurement by a non-competitive method" is one where a product or service can only be purchased from a single source or supplier therefore not allowing for vendor and price competition. "Procurement by a non-competitive method" vendor requires explanation, written justification and evidence by completion of sections A, B, and C below.

A. Explanation for Procurement by a non-competitive method (select one or more):

- Product/Service is unique (explain your research/work requirements and the relevance of the unique product/service)
- Continuity of existing research/work
- Critically important features (detail the features and your research of comparable items)
- Repairs, replacement parts, or technical service available only from manufacturer or authorized distributor
- Compatibility with existing equipment
- Emergency purchase (life, health or property is in jeopardy)

Attachment of the sponsored project award (attach copy if considered inadequate)

Procurement method. Please provide evidence for your correspondence with vendors, sources that were inquiries made with other institutions/departments /relevant attachments.

Your efforts to determine price reasonableness of products, which may include:

at peer institutions who have purchased the

Requisitioner's Signature

View/Display Your Purchase Orders

The screenshot shows the Atlas procurement system interface. At the top, there is a navigation bar with the Atlas logo and the text "navigating your MIT world". The navigation bar includes links for HOME, ABOUT ME, and CAMPUS LIFE. On the right side of the navigation bar, there is a user profile icon and the text "welcomed".

The main content area is titled "Buying" and contains the following sections:

- Buying**: 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, Sodexo 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. (This link is highlighted with a blue box in the screenshot.)
- 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.

On the left side of the main content area, there is a "MENU" dropdown menu with the following items:

- Time and Vacation Entry
- Buying** (highlighted with a blue box and an arrow pointing to the "Find Purchase Orders" link in the main content area)
- My Reimbursements
- Service Requests
- Training
- Event Planning
- FULL CATALOG

On the right side of the main content area, there is an "Additional Resources" section with the following links:

- Procurement Forms
- SmartBuy
- Preferred Suppliers
- Learning to Buy
- eCat Help
- Training: Online and In-person
- Sourcing & Procurement
- Buying FAQ

A callout box on the left side of the screenshot lists the following actions:

- Search PO History
- View Payment History
- View/Print: PO , Invoices
- View/Print Attachments
- View Line Status: (Open Closed)

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 Alamiyos, 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

MIT IST © 2006-2013 Massachusetts Institute of Technology
Need help? Review our [contact information](#) for technical support and other resources.

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	\$0.00		

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							\$0.00			

MIT IST © 2006-2013 Massachusetts Institute of Technology
Need help? Review our [contact information](#) for technical support and other resources.

How to Close Purchase Orders

The screenshot shows the Atlas procurement system interface. At the top, there is a navigation bar with the Atlas logo and the text "navigating your MIT world". The navigation bar includes links for HOME, ABOUT ME, and CAMPUS LIFE. On the right side of the navigation bar, there is a user profile icon and the text "welcomed".

On the left side, there is a menu with the following items: Time and Vacation Entry, **Buying**, My Reimbursements, Service Requests, Training, Event Planning, and FULL CATALOG. A blue arrow points from the "Buying" menu item to the "Close Purchase Orders" task in the main content area.

The main content area is titled "Buying" and contains the following sections:

- Buying**: 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 poccloseout@mit.edu.
- Place Personal Orders**: Find discounted prices for computers, office supplies, and cell phones.

On the right side, there is a section titled "Additional Resources" with the following links: Procurement Forms, SmartBuy, Preferred Suppliers, Learning to Buy, eCat Help, Training: Online and In-person, Sourcing & Procurement, and Buying FAQ.

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

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

 © 2010 Massachusetts Institute of Technology Need help? Review our [contact information](#) for technical support and other resources.

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

The screenshot displays the Atlas procurement system interface. At the top, the navigation bar includes the Atlas logo with the tagline 'navigating your MIT world', and menu items for HOME, ABOUT ME, and CAMPUS LIFE. On the right side of the navigation bar, there are icons for a user profile and a 'welcomed' dropdown menu.

The main content area is titled 'Buying' and contains the following sections:

- Buying**: 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). This section is highlighted with a blue box.
- 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 poccloseout@mit.edu.
- Place Personal Orders**: Find discounted prices for computers, office supplies, and cell phones.

On the left side, there is a 'MENU' sidebar with an 'edit' link. The menu items are: Time and Vacation Entry, **Buying** (highlighted with a blue box), My Reimbursements, Service Requests, Training, Event Planning, and FULL CATALOG.

On the right side, there is an 'Additional Resources' section with the following links: Procurement Forms, SmartBuy, Preferred Suppliers, Learning to Buy, eCat Help, Training: Online and In-person, Sourcing & Procurement, and Buying FAQ.

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

Search/Select an Internal Provider

Internal Note (not printed on PO)

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

Personal Purchases

MENU ?

edit ✎

Time and Vacation Entry

Buying

My Reimbursements

Service Requests

Training

Event Planning

☰ FULL CATALOG

Buying



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, Sodexo 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](#)

[Preferred Suppliers](#)

[Learning to Buy](#)

[eCat Help](#)

[Training: Online and In-person](#)

[Sourcing & Procurement](#)

[Buying FAQ](#)

Employee Discounts for Personal Credit Card Purchases: Staples, Apple, Dell and others!

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

Atlas navigating your MIT world

HOME ABOUT ME CAMPUS LIFE

welcomed

MENU ? edit

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

FULL CATALOG

Buying

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
- Preferred Suppliers
- Learning to Buy ★
- eCat Help ★
- Training: Online and In-person ★
- Sourcing & Procurement
- Buying FAQ

Who to Contact



Procurement Manager

Rositha Durham
617-253-7241
rdurham@mit.edu



Computers & Technology

Bill Akerberg
617-253-5499
akerberg@mit.edu



Scientific & Lab Supplies

David Petricone
617-253-8393
petricon@mit.edu



Furniture

Stephen Newman
617-253-8373
sfnewman@mit.edu



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, negotiate, and draft Terms & Conditions associated with purchases of goods and services.
- ✧ Create purchase order contracts for professional services using MIT's Terms & Conditions.
- ✧ Types of contracts include complex service and management agreements, software licenses, consultants & independent contractors, non-disclosure agreements, database, equipment, maintenance, leases, events, hotel, and others.

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
- ✧ Confidentiality: FERPA, PIRN
- ✧ IP Rights, Third-Party Infringement

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

Independent Contractors

Independent Contractors:

- ✧ Governed by IRS and MA state regs
- ✧ Approval process – form, resume, client list
- ✧ Recertification required every two years
- ✧ Alternatives: MITemps, payroll
- ✧ Critical as enforcement of regulations intensifies.
- ✧ Penalties to MIT may involve significant fines

Independent Contractors

WHO IS AN INDEPENDENT CONTRACTOR?

- Paid through their Social Security #
- History of offering/performing similar services
- Work not comparable to MIT employees
- No direct supervision by MIT employees
- Project-driven, short term
- No office space or administrative services
- MIT students, employees not eligible

Independent Contractors

- Contractors not requiring IC approval
- Have federal tax ID number
- Entertainers, artists, referees
- Foreign citizens working in a foreign country

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

Signing Authority

- ✧ Procurement has formal authority to sign contracts
- ✧ This formal authority does not extend to departments, faculty, administrators (very few exceptions)
- ✧ Unauthorized signatures – personal liability exposure

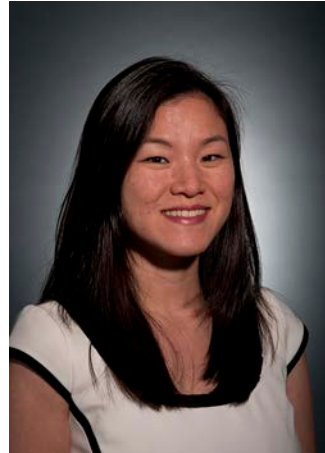
- ✧ Do not sign contracts!

Contracts Team



**Assistant
Director of
Contracts**

Tony Flaherty
617-253-8268
aflahert@mit.edu



**Senior
Contract
Administrator**

Christina Lo
617-253-1747
loc@mit.edu



**Senior
Contract
Administrator**

Brion McAlarney
617-252-1545
brionm@mit.edu



**Assistant
Contract
Administrator**

Brenna Niles
617-253-0550
baniles@mit.edu

Thank You For Joining us!

How can we best support you?

Questions, Discussion

