

PURCHASING PROCEDURES

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Instructions for Procuring Supplies for Capstone Projects	Aug. 4, 2021	1

University of Idaho
Interdisciplinary Capstone Design

Instructions for Procuring
Supplies for projects

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1 Objective

The objective of this document is to outline specific guidelines to follow for interdisciplinary capstone design teams to purchase necessary supplies for the execution of their projects.

2 Scope

This document is applicable for projects which have an allocated budget for purchasing materials and supplies for projects.

3 Before you buy anything

3.1 Identify a designated team coordinator for procurement

Each student team must identify a designated coordinator for purchasing parts. This team member will be the primary point of contact for purchasing supplies for the project. It is often ideal (but not required) for this person to also be the manager of the project budget.

3.2 Talk with your lead instructor about the purchasing strategy

Capstone instructors may recommend varying strategies for ordering parts, depending on the project scope, the source of funding, or departmental preferences.

Some possible logistics include:

- Ordering supplies and materials through the Engineering Finance team → engr-finance@uidaho.edu
- Working directly with the lead instructor to order parts directly
- Direct purchase followed by reimbursement
- Any combination of these options

Capstone students are required to work with lead instructors to make purchases materials and supplies to support their projects.

4 Identifying the supplies you need

There are a variety of sources available for acquiring materials and supplies. Before attempting to purchase supplies, you are encouraged to explore available UI resources for possible acquisition at little or no cost. These resources may include:

- Inventory from past projects
- Leftover materials in the ME shop (bulk material, hardware, etc.)

The following are other common sources for materials.

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4.1 Internal UI Sources

Several resources are available on campus to acquire parts and materials, including:

- 1) The ME shop (GJ 108) – lots of residual inventory of materials and hardware and fabrication capability
- 2) UI Facilities and Shop Stores ([Link](#)) – lots of stock material and fabrication capability
- 3) ChemStores – located in the basement of Renfrew (<https://www.uidaho.edu/sci/chem/chem-stores>)
- 4) Plasma arc cutting of sheet metal – via Chad Dunkel (cdunkel@uidaho.edu)
- 5) Ankit Gupta (GJ 234A) – some inventory of electronic/computing equipment

4.2 Local Sources

A lot of resources are available in or near Moscow, including:

- a) Moscow Building Supply
- b) Ace Hardware
- c) Many others...

4.3 Online Sources

Ordering parts/supplies online can often simplify the logistics for everyone. Consider finding suppliers online (Amazon, McMaster-Carr, Grainger, etc.) to enable easy credit card purchasing and minimize trips to local stores.

5 When you are ready to purchase supplies

Once you have identified what you want to purchase, you **MUST** follow this procedure to ensure timely processing, avoid confusion, and successfully manage the budget for your project.

5.1 Acquire a FULL cost estimate

Determine the **exact cost** (or very closely estimated) for any component(s) and supplies you wish to purchase. Be sure to include your best estimate of any shipping expenses and any other fees which may apply.

5.2 Fill out the appropriate Purchasing Form

You **MUST** fill out a [Purchasing Form](#) electronically for each supplier you plan to order from. Provide the following information:

- Your contact information
- Vendor and vendor contact info
- Index number (to be provided by lead instructor)
- Itemized listing of the supplies for purchase including quantity (with units), description, unit cost, and total cost for each.
- Estimate the value of Shipping if applicable (use 10% of the order value if unknown)
- Brief description of the what the purchase is for (“Justification of Purchase”)

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5.3 Update the Budget Tracking sheet

You MUST update your **Budget Tracking** sheet to accurately reflect the amount of funds which you have already spent to date, and your planned projected expenses (including estimated timing) for the full duration of the project, including the exact expense you are requesting. The total projected expenses should be within your total project budget. If not, please see your lead instructor as soon as possible.

5.4 Gain approval for purchase from Lead Instructor

Review both the completed Purchasing Card Form and the updated Budget Tracking sheet with your **lead instructor**. Acquire sign-off approval from the lead instructor as needed on the “Purchasing Card Form”.

5.5 Work with your Lead Instructor to order

Talk with your Lead instructor about the appropriate steps for placing an order. Your instructor may advise you to do any one of the following:

- a) Email the approved Purchasing Card Form to engr-finance@uidaho.edu, including any hyperlinks to the item(s) you wish to purchase.
- b) Provide a budget index to an on-campus supplier.
- c) Meet with the lead instructor at a local supplier to facilitate purchase together.
- d) Proceed with purchasing items with your own money and seek reimbursement. This requires submitting a Reimbursement (Non-travel) Form to be reimbursed for expenses.
- e) Other possible options for unique circumstances (?)

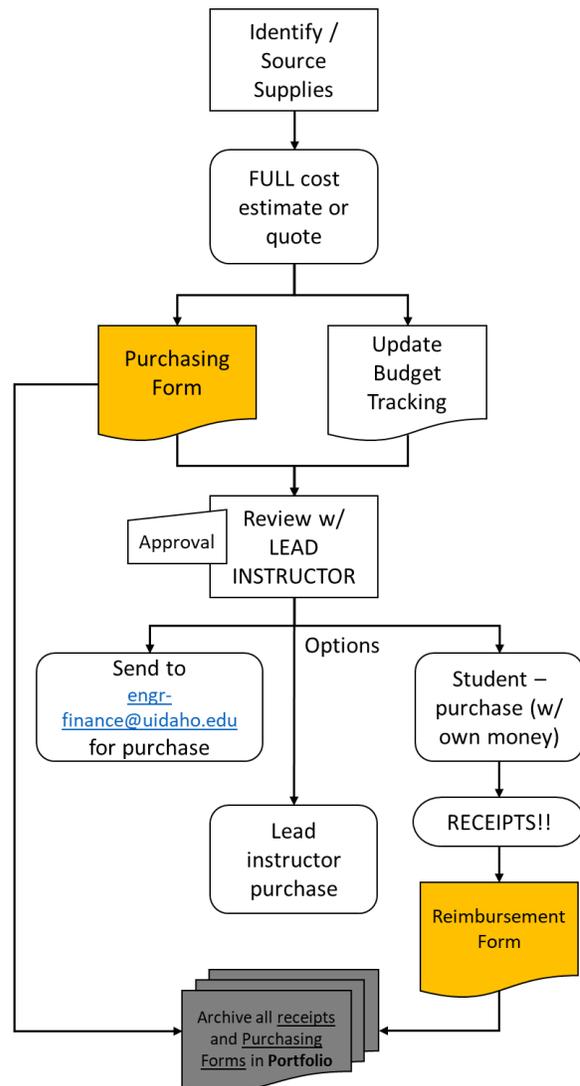
The appropriate action may depend on the situation. It is highly encouraged that you have a plan for purchase in mind which you can recommend to your lead instructor.

The University of Idaho is exempt from state sales tax.

5.6 Receipts

You must SUBMIT RECEIPTS (via email to engr-finance@uidaho.edu) for everything that you purchase along with the Reimbursement (Non-travel) Form! PLEASE DO NOT HOLD ONTO RECEIPTS!

Valid receipts are typically printed receipts from a local vendor that are scanned into PDF format.



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Archive of all project receipts in **PDF** format. Use a common naming convention for each file such as:
date_vendor_brief description.pdf

Maintain an electronic archive of all receipts and Purchasing Card Forms in your **Portfolio**.

6 Shipping and Logistics

All items purchased for shipment must be **shipped to the University**, and not your home (per university policy).

6.1 Shipping destinations

All items purchased by the **lead instructors** will be shipped to the lead department.

All items purchased by enr-finance@uidaho.edu will be shipped to **EP 312**.

6.2 Collection of Goods

Once the items have arrived, an email will be sent to the contact identified on the Purchasing Card Form.

7 Restrictions

The following items are restricted and may not be purchased using a UI Credit Card or project budget:

- Alcoholic beverages and controlled substances
- Ammunition / Weapons
- Food / Water / Entertainment
- Hospitality Expenses / Gifts
- Household Moving Expenses
- Office decorations
- Personal items
- Utilities / Cellular phone charges
- Radioactive / Hazardous Materials
- Consulting Fees / Individual Contracts