

# ARC Purchasing Do's and Don'ts

To assist customers in processing Purchasing related transactions in ARC, please find the following do's and don'ts that we hope will make your requisition processing a little easier and faster.

## DO'S:

- When processing a UwPA transaction you must be sure that the category code(s) selected and the ARC Vendor ID match properly in order to for the transaction to be identified by ARC as a UwPA. This information is located in the ARC Contract Module or through the Purchasing Guide through the Purchasing website
- All requisitions **must** contain category codes for each line item and **must** accurately reflect the requested purchase (see areas circled in red)

## Create Requisition

1. Define Requisition      2. Add Items and Services      3. Review and Submit

Add lines to the requisition, specifying the information necessary to procure each item or service.

Search:

Catalog Favorites Templates Forms Web **Special Request**

Special Item

\*Item Description:

\*Price:  \*Currency:

\*Quantity:  \*Unit of Measure:

**\*Category:**

Vendor ID:

Vendor Name:

Vendor Item ID:

Mfg ID:

Due Date:

[Suggest New Vendor](#)

- All UwPA's transactions and orders under \$500 in ARC require that a quote/proposal/invoice be uploaded in the Purchasing EDM to avoid delays in processing.
- Please **be sure to add a Quote Number** (when applicable) either in the line item description or in the Additional Information Box. If using this box, please be sure to check the box directly underneath "Send to Vendor" (see areas circled in red). If you do not include this information, your order may be significantly delayed by the supplier. Purchasing does not enter this information into the transaction.

This box can also be used for any information you want to send to the vendor.

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Search:

[Catalog](#) | [Favorites](#) | [Templates](#) | [Forms](#) | [Web](#) | **Special Request**

**Special Item**

\*Item Description:

\*Price:  \*Currency:

\*Quantity:  \*Unit of Measure:

\*Category:   Due Date:

Vendor ID:

Vendor Name:

Vendor Item ID:

Mfg ID:

Manufacturer:

Mfg Item ID:

**Additional Information**

Send to Vendor  Show at Receipt  Show at Voucher

**Request New Item**

Request New Item

- **Vendor email addresses** are required on all Purchasing transactions
- **For multi-year contracts:**
  - After selecting "Special Request" you must choose "Fixed Cost Service"

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Search:

[Catalog](#) | [Favorites](#) | [Templates](#) | [Forms](#) | [Web](#) | **Special Request**

**Select a Request Type**

<a href="#">Special Item</a>	Request an item that is not listed in the Catalog.
<a href="#">Fixed Cost Service</a>	Request a one-time service for a flat fee.
<a href="#">Variable Cost Service</a>	Request a service for which the fee is based on the time worked.
<a href="#">Time and Materials</a>	Request a service for which the fee is based on the time worked and materials used.

- Enter the **contract start and end dates** in the header information

# Create Requisition

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Add lines to the requisition, specifying the information necessary to procure each item or service.

Search:  Search

Catalog Favorites Templates Forms Web Special Request

### Fixed Cost Service

\* Service Description:

\* Value of Service:  \* Currency:

\* Category:

Vendor ID:   [Suggest New Vendor](#)

Vendor Name:

Start Date:   End Date:

Quote Number:  Quote Date:

Additional Information

- There must be a line item created for each contract year
- For a contract extending beyond three (3) years, the remaining years will be added after the 3<sup>rd</sup> year, and updated by a Change Order
- If total PO value of contract is to be paid in the 1<sup>st</sup> year of a multi-year contract PO, please be sure to specify in the comments section of the PO and do not check the "Send to Vendor" flag

- **All supporting documents being submitted/uploaded into the Purchasing EDM** must be properly indexed (e.g. proposals, scope of work, contract, etc.). Do not combine different documents together under 1 document type as this will delay the processing of your transaction. Documents must be indexed (uploaded) separately.

### Core Documents

Please see the list of Core Documents below that are still needed before we can process this order.

Select a Document Type

- 3rd Party Agreement / Ts & Cs Signature
- Building Lease
- Business Associates Addendum
- Certificate of Insurance
- Contract
- Contract Amendment
- Contract Exhibits
- DEA License for Controlled Substances
- Equipment Schedule
- Exchange Rate Sheet
- Executed Subcontract**
- Furniture Exception Form
- Independent Contractor Certification
- Laser Form
- Lease Proposal
- Letter of Assignment
- Letter of Delegation
- Manual Signature
- Non-Compliance Form
- Power of Attorney
- Proposal / Quote / Invoice
- RFP / Bid Summary Sheet
- Resume / Company Brochure / Client List
- Scope of Work - Required
- Single/Sole Source Justification Manual Form
- State Research License for Controlled Substances
- Task Order Proposal Form
- Unauthorized Purchase Justification
- Select a Document Type

	Submittal Date	Submitted By
)	Aug 7, 2012	KH313
	Jul 9, 2012	KH313

the Requisition/PO.

File

- If the transaction is not a UwPA and is a competitive purchase and **already invoiced by vendor**, you **must** select the “Sole/Single” Source Flag in the requisition header. Note: You should always follow Competitive

ARC  
 Favorites | Main Menu > eProcurement > Create Requisition

### Create Requisition

1. Define Requisition | 2. Add Items and Services | 3. Review and Submit

Specify requisition name, requester, and other information that applies to the entire requisition.

Business Unit:  Columbia University

\*Requester:  Evelyn Cora

Requisition Name:

**Sole/Single Source**

\*Currency:

Priority:

**Line Defaults**

**Note:** The defaults specified below will be applied to requisition lines when there are no predefined values for these fields.

Vendor:  Vendor Location:

Buyer:  Category:  Unit of Measure:

**Shipping Defaults**

[Modify Onetime Address](#) [Modify Bill To Address](#)

- The **Single/Sole Source justification** form link will be sent via email to the requestor the next business day after the requisition is approved. Once the link is opened, it will reference the respective requisition and must be completed. Do not upload a separate single/sole source justification form through EDM.
- Use the **Purchasing Guide for UwPA’s, Purchasing Mechanism Guide, and Category Codes list** to verify correct information for each transaction.
- All requisition supporting documents must be uploaded **no more than 9 days** after transaction is released by the requestor. If the supporting documents are not received in this time, the transaction will be sent back (denied) to the requestor and can be re-submitted once all documents are available.
- Requisitions should be **itemized to match the line items on the quote**.
- Checking the **Purchasing EDM Web Form** will provide the most up to date status of your requisition or change order

**DON'Ts:**

- Don’t make any changes to requisitions once they are assigned and pending Central Purchasing
- Please do not issue a Service Now Incident and follow-up with an email and/or phone call for the same issue, you will be directed back to the Incident issued to resolve the matter.
- Don’t upload requisition supporting documents as one (1) file when there are different documents to be provided; each must be indexed separately.