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 purchases necessarily 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. The procedures and contact points for each respective department are slightly different.

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 person will be the primary point of contact with the purchasing agent for the project. It is often ideal (but not required) for this person to also be the manager of the project budget.

3.2 Identify the Purchasing Agent for the project
The respective Purchasing Agent for the project will depend on the departmental budget for the project. Typically, Purchasing Agents will be one of the following:

- For ECE funded projects → The ECE department manager (Brooke Dahmen – BEL 212)
- For Biological Eng. (BE) funded projects → The BE department manager (Judy Vandegrift – EP 419)
- For ME funded projects → The ME lead instructor (Dr. Maughan, Dr. Cordon, Dr. Beyerlein, or Dr. Swenson)

Each of these agents will assist or make purchases for you as needed.

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.
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 Tadd Wheeler (taddw@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 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 Approval Form
You MUST fill out an ENGINEERING PURCHASE REQUEST (aka a “Green Sheet”) for each supplier you plan to order from. Provide the following information:
- Vendor and vendor contact info
- Itemized listing of the supplies for purchase including quantity, description, unit and total costs
- Who you want the items shipped to (if necessary)

The “Green Sheet” may be filled out and submitted electronically.
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 *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 ENGINEERING PURCHASE REQUEST form and the updated Budget Tracking sheet with your *lead instructor*. Acquire sign-off approval from the lead instructor as needed on the “Green Sheet”.

5.5 **Work with your Purchasing Agent**

Talk with your Purchasing agent about the appropriate steps for placing an order. The Purchasing Agent may advise you to do any one of the following:

a) Send them an online link to the item you wish to purchase
b) Take a department credit card to a local vendor to make your purchase
c) Provide a Budget Index and Activity Code to an on-campus supplier. This requires submitting a WORK ORDER FORM (aka “blue sheet”).
d) Enable them to purchase the components locally and coordinate delivery
e) Proceed with purchasing items with your own money and seek reimbursement. This requires submitting a REIMBURSEMENT REQUEST (aka “Pink Sheet”) to be reimbursed for expenses.
f) Other possible options…

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 the Purchasing Agent.

The University of Idaho is exempt from state sales tax. This is stated on the face of each credit card. Please do not forget. If a vendor needs our tax exempt information when placing phone or web orders, please contact your purchasing agent. If you vendor will not accept tax exemption, please notify your purchasing agent.
5.6 Receipts

YOU MUST PROVIDE RECEIPTS FOR EVERYTHING THAT YOU PURCHASE TO YOUR AGENT IMMEDIATELY FOLLOWING PURCHASE! PLEASE DO NOT HOLD ONTO RECEIPTS!

Valid examples of receipts include:
- Printed receipts from a local vendor (scan them into PDF format)
- PDF versions of online order receipts or order confirmations (see appendix)

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 archive of all receipts and Purchase Requests (“Green sheets”) 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 ECE department projects

All shipments to the ECE department should be sent to the following address:

ATTN: Insert contact name of person receiving the item
Electrical and Computer Engineering department
University of Idaho
875 Perimeter Drive, MS 1023
Moscow, ID 83844

6.2 BE department projects

All shipments to the BE department should be sent to the following address:

ATTN: Insert contact name of person receiving the item
Biological Engineering department
University of Idaho
875 Perimeter Drive, MS 0904
Moscow, ID 83844

6.3 ME department projects

All shipments to the ME department should be sent to the following address:

ATTN: Insert contact name of person receiving the item
6.4 Collection of Goods

Once your external supplies have been delivered, your respective department office will send you an email notifying you of availability.

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
- Household Moving Expenses
- Office decorations

8 Appendix

Examples of acceptable receipts…

Amazon:

McMaster-Carr: