# e-SHOP

## Policy

Cornell's e-procurement system is the preferred method for initiating an order for goods and services. For suppliers enabled in this system, units should utilize this procurement tool for all transactions with that supplier to ensure that the unit receives Cornell's discounted pricing.

## Definition

e-SHOP is Cornell's branded e-procurement system, which allows the user to procure goods and services from a wide variety of selected suppliers through KFS. Low dollar purchases (generally under $2,500) are eligible to be routed directly to the supplier with no additional approval requirements. Purchases above $2,500 will route to your Business Service Center, and purchases over a pre-determined automatic purchase order (APO) limit (see below) will route to Procurement for approval, prior to being sent to the vendor.

## Types of Suppliers in e-SHOP

The following types of suppliers are available in e-SHOP:

- Preferred (APO limits range from $25,000 - $100,000) – see definition in section 102
- Contract (APO limits of $25,000) – see definition in section 102
- Pricing Agreement (APO limits of $25,000; no bidding exemption) -- For your convenience, Procurement has pricing agreements with terms and conditions in place with suppliers who meet one of the following criteria:
  - They have discounted pricing for Cornell.
  - They have a service, license, or maintenance agreement with Cornell.
  - They support the local economy, i.e., located in Tompkins or adjacent county
  - They meet criteria for small or diverse business classifications, as defined by the Small Business Administration.
  - They support Cornell's sustainability initiative.

## Process

When purchasing from a supplier that is available in e-SHOP, the requisition should be started in e-SHOP. e-SHOP provides several benefits to the user and to the University:

- The e-SHOP shopping cart populates the line item detail in the KFS requisition
- One shopping basket may be created for purchases from multiple suppliers
- Both users and approvers may store notes on the order, helping to document the history
- Transaction details are stored electronically

Not all items in a vendor's e-SHOP punch-out site or hosted catalog are under contract, for those items you are encouraged to shop for best price or contact Procurement to determine if the e-SHOP vendor will match the better price.

It is possible to create an order in e-SHOP that is greater than the formal bid limit of $25,000. Such purchases will be routed to the BSC for approval and then to Procurement for final review and approval. Bidding may be required at the discretion of the procurement agent, see Buying Manual section 402, Bid Solicitations and Exemptions.

## e-SHOP Training

In preparation for using the system, it is recommended that new users participate in the webinar and/or take the tutorials for KFS Basics and KFSPUR400e-SHOP Tutorial. For additional information on e-

SHOP, including training materials and the monthly webinar schedule, please visit the Procurement website at https://www.dfa.cornell.edu/procurement/e-shop/training.

## Granting or Removing e-SHOP Access

To obtain access to e-SHOP and KFS, the end user should contact his/her BSC. It is the responsibility of the BSC Director to review, approve, and update employee access to KFS and e-SHOP. Everyone with a valid Cornell NetID is automatically set up with a Shopper role. The Kuali Security Request (KSR) doc is used to grant or remove access for the e-SHOP User and e-SHOP Plus User roles. When either the e-SHOP User or e-SHOP Plus User role is removed, the access will automatically default to the Shopper role.

## e-SHOP Roles

The four e-SHOP roles are described below.

1. **Shopper**: This role is automatically available to any individual with a valid Cornell NetID. This role allows all users to review supplier catalogs in e-SHOP and create shopping carts of goods or services in e-SHOP. These carts must be assigned to an "e-SHOP User" to create a purchase order.
2. **e-SHOP User**: This role has a ***$2,500 automatic purchase order (APO) limit*** and the permission to initiate, edit and accept assignment of carts in e-SHOP and fully process them as Purchase Orders in KFS. This role should be requested for all users who initiate e-SHOP transactions **OR** any user who would be assigned a cart to complete in KFS from another e-SHOP user. This role will be granted by the BSC using the Kuali Security Request (KSR) doc.
3. **e-SHOP *Plus* User**: This e-Shop user role has a higher ***$5,000 APO limit***. This role also has the permission to initiate, edit and accept assignment of carts in e-SHOP. This role should only be requested for users who meet **both** of the following criteria:
    a. **Position** – such as:
        i. Administrative/Business Manager
        ii. Inventory staff (ordering to replenish or create inventory for a warehouse or job)
        iii. Positions that require procurement of timely or emergency goods
        iv. Procurement buyers - such as those in Facilities Services
    b. **Card history and experience**:
        i. Demonstrated history of compliance with pcard policy
        ii. Demonstrated and frequent need for higher limits (e.g., type of purchases or need for quick or non-work hour procurements)
        iii. Demonstrated potential need for emergency purchases
        iv. Demonstrated and frequent need for the purchase of expensive equipment/materials. This role will be granted by the BSC using the Kuali Security Request (KSR) doc.
4. **Vendor**: This role grants an e-SHOP vendor limited e-SHOP access and the ability to create a custom quote by creating a vendor cart for approval by an e-SHOP user. Access is granted by Procurement based on e-mail requests by the applicable Strategic Sourcing Agent; no KFS access is granted or needed.

## BSC e-SHOP Access Process Tips

- **e-SHOP User.** Requesting e-SHOP User role access is done via the Kuali Security Request (KSR) doc. Once the Org and Primary/Secondary Approvers are set up, the doc will route for approval accordingly.

- **e-SHOP *Plus* User.** Once the individual meets the e-SHOP *Plus* User role criteria stated above, initiate the Kuali Security Request (KSR) doc to request access. Once the Org and Primary/Secondary Approvers are set up, the doc will route for approval accordingly.
  - ***Requirement***: Ad hoc route "Approve" the KSR doc to the individual's Department/Unit Chair and the appropriate BSC Director for approval.

- Once all approvals have been obtained, the access will be granted immediately.

- To modify a role from e-SHOP Plus User to e-SHOP User, you must process a request to remove the e-SHOP Plus User role and process a separate request to create the e-SHOP User role.