



When do I use Viking Shoppes (VS)?

- **NON- ECSU STUDENT STIPEND & Non-ECSU Payment– Direct Pay**
- **≥ \$5,000.00 PURCHASE**
- **INVOICE PROCESSING – Direct Pay**
- **CONTRACTS**

1. Access Viking Shoppes via ECSU's Homepage.
2. Click "Direct Pay Request" – under FORMS.
3. "Enter Vendor": start typing name (if it exists in Viking Shoppes, after a few characters a list may appear, select the correct one). If the vendor does not appear, contact Purchasing Dept for assistance.
4. Scroll down, enter the amount, tab – enter the description (may include invoice #, dates) and information that details what/why ECSU is paying.
5. Scroll down to "Date check Needed" – key in date or select one from calendar.
6. "Check Type" – select single if to one vendor, multiple if entering more than one vendor on same requisition.
7. "Special Instructions" – usually used if you want Accounts Payable (AP) to hold the check for pickup, otherwise leave blank and check may be mailed.
8. "Dept Name" – your current dept
9. "Dept Contact" – your name and extension
10. Scroll back to the top – upper right corner "Available Actions" scroll back "Add and go to Cart", click GO.
11. Click "Proceed to Checkout" (top right corner/blue).
12. Section **Accounting Codes** – key the FUND (starts with 5) and ACCOUNT (starts with 1). You may use the magnifying glass to select from drop down list.
13. Section **Internal Notes and Attachments** – click "ADD" - the attachment box will appear. Click "select file" to add completed stipend certification form, invoice, quote, etc. This supporting documentation must equal the amount of requisition. Click "save changes".
14. Click "Place Order" top corner.

NOTE: Check may be mailed by AP or available for pickup.

NOTE: Items may be purchased from catalog and suppliers already in Viking Shoppes. Click supplier, Add to cart, step 12 & 13, place order.

NOTE: Purchases > \$5,000.00 may require an eReceive or eReceipt in Viking Shoppes – this means you will have to revisit VS and perform further action. Email communicated, questions – contact Accounts Payable Staff.

NOTE: Additional documentation or reply to a comment – go to COMMENT tab, click “+” and type in the box, choose file to upload.

NOTE: If you have an invoice to pay and did not receive approval before purchase was made, you must complete and attach an Unauthorized Purchase Form to requisition.

Requisition #: _____

Vendor Name : _____

Unauthorized Purchase Explanation/Certification

- 1 Why wasn't a requisition submitted and purchase order number obtained prior to making this purchase?
- 2 Was this an emergency situation (i.e., health or human safety were at risk)? If so please explain: (attach additional sheet if needed)
- 3 What steps will you take in the future to avoid committing an unauthorized purchase?
- 4 List invoice number and dates event(s) occurred.
- 5 Attach proof of delivery of item(s) or service(s) provided. This may be in the form of a Packing slip, freight bill or invoice.

NOTE: This certification must be signed by the individual responsible for the unauthorized purchase. This is necessary in the event Business and Finance does not approve the purchase and requires that *the individual be personally liable for the purchase.*

"I hereby certify that I am the individual responsible for the unauthorized purchase, that I inspected the merchandise or services listed above and there is no exception as to quantity or quality."

Signature

Date

Printed Name

CONTRACTS

1. Access www.ecsu.edu
2. Click Employee Portal
3. Scroll down and click Viking Shoppes
4. Home page – to originate click box marked “Contract Request”.
5. “Enter Vendor”: start typing name (if it exists in VS after a few characters, a list may appear, select the correct one). If the vendor does not appear, contact Purchasing Dept for assistance.
6. Complete Type of Contract. Scroll down to complete Contract Summary Section.
7. Scroll back to the top – upper right corner “Available Actions” scroll back “Add and go to Cart”, click GO.
8. Supplier Details, under “Item” click the blue lettering – description you typed on home page
9. Scroll to “Contract Template”, select corresponding contract, complete and save.
10. Click “Proceed to Checkout” (top right corner/blue)
11. Section **Accounting Codes** – key the FUND (starts with 5) and ACCOUNT (13090).
12. Section **Internal Notes and Attachments** – click “ADD” - the attachment box will appear. Click “select file” to add completed contract from Step 9. Supporting documentation must equal the amount of requisition. Click “save changes”.
13. Click “Place Order”.

TRAINING:

Access Viking Shoppes, home page, click Training Videos and Other Resources.

Scroll page down, under “Purchasing” click Video: Contract Request and follow training instructions.

***Still have questions about this process, please consult with Purchasing Dept staff and/or Legal Affairs. ***

≤ \$4,999.99 PURCHASE – use ECSU issued P-Card for allowable expenses

Do I or my department have a P-Card?

How do I obtain a P-Card?

What is my limit? How and when may the P-Card be used?

1. Access www.ecsu.edu
2. Click Employee Portal
3. Scroll down and click Viking Shoppes (VS)
4. On Viking Shoppes home page, click Training Videos and Other Resources
5. Business and Finance Home Page menu (left side of page)
6. Click Purchasing, scroll down, under Resources (mid page) click ECSU Purchasing Card Manual

***Have questions? Please consult with Purchasing Department staff for additional questions or concerns. ***

AWARD CLOSEOUT

Federal agencies usually require closeout of projects within 90 days of project termination date but always check award document terms and conditions

Principal Investigator (PI) should review and reconcile:

- Final project expenses – before project end date.
- Final invoice from subrecipients final payment should be made prior to prime project end date so that all encumbrances can be cleared.
- All deliverables, financial and technical reports, must be completed and sent to sponsor.
- Submission of all deliverables as final payment may be dependent on agency's receipt of deliverables and progress reports.
- Equipment, inventory, and intellectual property reports.

PI may receive via email 90, 60, 30-day Notice of Award End notification, presented in excel or PDF format.



Double click to open

RELEASE TIME

Refer to ECSU Policy manual Section 200.3.3

PI originates this form based on grant proposal and approval from agency.

Complete the following fields on the form:

- Name
- Division
- Department
- Effective and Submitted Date
- Forward to Sponsored Programs for completion and signatures in SECTION I. Form should follow respective route per Section listed.
- Monitor Banner for payroll expenses of Release Time

Form Location:

www.ecsu.edu

Inside ECSU

General Information menu click Business and Finance

Forms and Documents

Contracts and Grants (gray), Forms

Release Time RFPA (**PDF**)