e-SHOP

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 $500) are eligible to be routed directly to the supplier with no additional approval requirements. Purchases above $500 will route to your Financial Transaction or Business Service Center for approval, prior to being sent to the vendor.

* Note: When a good or service is available through e-SHOP and is under contract pricing, then e-SHOP will be the method of procurement.

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.

* Note: It is possible to create an order in e-SHOP that is greater than the formal bid limit of $10,000. Such purchases will be routed to the FTC/BSC for approval and then to Procurement Services for final approval.

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. See https://www.dfa.cornell.edu/procurement/e-shop/training for additional information on e-SHOP, including training.

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 **$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 FTC/BSC using the Kuali Security Request (KSR) doc.

3. **e-SHOP Plus User**: This e-Shop user role has a higher **$1,500 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 FTC/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 Services based on e-mail requests by the applicable Strategic Sourcing Agent; no KFS access is granted or needed.

**Granting or Removing e-SHOP Access**

To obtain access to e-SHOP and KFS, the end user should contact his/her FTC/BSC. It is the responsibility of the FTC/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.

**FTC/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 FTC/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.