



Procurement Guidelines

*Furman University Procurement Services
Office of Finance & Administration*

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I. Overview of Procurement Services

The purpose of these Procurement Guidelines (“Guidelines”) is to provide procedures and guidance on the University’s procurement requirements. These Guidelines apply to all University departments and offices when procuring goods or services, regardless of funding source. Purchases funded by state or federal grants, contracts, or restricted discretionary funds must also comply with the applicable sponsor terms and conditions in addition to these Guidelines.

II. How to Purchase Goods and Services

This section describes the methods, thresholds, and requirements for purchasing goods and services at the University.

II. 1 Purchasing Methods

All University purchases require proper approval before orders are placed. The University uses the following purchasing methods.

II. 1.1 University Credit Card (See II.6)

The University Credit Card (Travel and Purchasing Card) is a primary purchasing method and should be used when it complies with the Credit Card Program Guidelines and the supplier does not charge credit card fees.

II. 1.2 Purchase Requisition/Purchase Order (See II.3/II.4)

A Purchase Requisition/Purchase Order is required when any of the following conditions apply:

- Credit card use is restricted or unavailable under the University policy.
- The supplier does not accept credit cards.
- The supplier charges additional fees for credit card use.
- The supplier requires a purchase order.

II. 1.3 Supplier Invoice Request (See II.7)

A Supplier Invoice Request may be used for one-time purchases under \$3,000 when credit cards are not accepted, and the purchase does not require a Requisition/Purchase Order.

II. 1.4 Miscellaneous Payments (Non-Student) (See II.8)

Miscellaneous Payments may be used for special cases approved by Accounts Payable when other standard purchasing methods are not appropriate.

II. 1.5 Credit Card as the Preferred Method

The Travel and Purchasing Card (“Credit Card”) is the University’s preferred payment method when it complies with the Credit Card Program Guidelines and the supplier does not impose additional fees. When credit card use is prohibited by University policy, or when the supplier does not accept the card or charges fees, a Purchase Order (PO) must be used. Refer to Policy 370.4, Credit Card Program, and the detailed Credit Card Program Guidelines in the Help, Finance section of Workday for additional information.

[Browse – Workday Help @Furman](#)

If a supplier does not accept credit cards, certain purchases may be made without a Requisition/Purchase Order. In such cases, use a Supplier Invoice Request or Miscellaneous Payment, as applicable. See Sections II.7 and II.8 below.

II. 2 Purchasing Competitive Quotation Thresholds

(Applies to all purchases, regardless of funding source or purchase method.)

II. 2.1 Purchases Under \$3,000 (Including Credit Card)

- Competitive bidding is not required.
- A Purchase Requisition is not required unless the supplier specifically requests a Purchase Order or charges a credit card fee.
- If credit cards are not accepted or additional fees apply, or the purchase is a one-time purchase, use a Supplier Invoice Request. See the Workday Help section for instructions on how to process a Supplier Invoice Request. [Browse – Workday Help @Furman](#)

II. 2.2 Purchases from \$3,000 to \$5,000 (Including Credit Cards)

- Competitive bidding is not required.
- A Purchase Requisition is required; competitive quotes are not required.

II. 2.3 Purchases Over \$5,000 (Including Credit Cards)

- Competitive quotes from **three** suppliers are required for both Purchase Order and credit card purchases.
- If the lowest bidder is not selected, document the reason for that decision.
- Submit a Purchase Requisition through Workday if the supplier does not accept credit cards, if the supplier charges a fee for using a credit card, or if the total exceeds your single credit card transaction limit.

II. 2.4 Additional Requirements

- **Capital Purchases (\$5,000+):** Any single piece of property or equipment valued at \$5,000 or more with a useful life of at least three years is classified as a capital purchase. All capital purchases must route through the Budget Department to ensure proper recording, tracking, and accounting.
- **Leases:** All lease agreements, regardless of dollar amount, must be reviewed by the Budget Department before finalization. Leases must be signed by the Vice President for Finance & Administration to ensure proper account coding and alignment with University policies.
- **IT & Software:** The purchase of information technology systems, hardware, software, and services requires approval from the AVP for Technology or an assigned designee to ensure systems compatibility and address maintenance considerations. See Policy 077.3, Information Technology Services (ITS) Purchasing Policy, Procedures, and Contract Approval in the Help, Finance section of Workday. [Browse – Workday Help @Furman](#)
- **Grants:** Purchases funded by federal or state grants may have a lower bidding threshold. Comply with the specific grant terms and any applicable federal or state requirements.
- **Emergency Orders:** If an immediate purchase is necessary and the use of a credit card is prohibited, contact the Procurement Office for assistance before issuing any verbal purchase order.
- **Sole Source:** If competitive bidding is not feasible or is not in the University's best interest, submit a completed Sole Source Justification form with the Purchase Requisition or credit card reconciliation in Workday. The form is available under My Furman → Employee Forms → Purchasing Folder on the University website.

II.3 Purchase Requisition (PR)

A Purchase Requisition is required when any of the following conditions apply:

- The total purchase exceeds \$3,000 or exceeds the requester's credit card transaction limit.
- The supplier does not accept credit card payments or charge fees for their use.
- The supplier requires a Purchase Order.
- The purchase meets competitive bidding thresholds. See Section II.2.
- The purchase qualifies as a capital acquisition. See Section II.2.4.

Requester responsibilities include the following:

- Ensure the Purchase Requisition is prepared and approved in Workday before goods or services are ordered.
- Provide adequate specifications, including catalog or part numbers, product or service descriptions, and valid General Ledger account numbers.
- Attach all required documentation to the Requisition, including quotations, bid comparisons for purchases exceeding \$5,000, and any sole source justification.

II. 4 Purchase Order (PO)

A Purchase Order is the legal document that establishes the University's commitment to purchase goods or services from a supplier.

Creation

- A Purchase Order is generated in Workday after the Purchase Requisition is approved by the appropriate parties.

Distribution

- Once approved, the requester should print or download the Purchase Order from Workday and email it to the supplier. See the Workday Help section for instructions on printing a Purchase Order.

II. 5 PunchOut (Workday) Requisitions

A PunchOut Requisition is a specialized ordering process within Workday for approved vendors such as Amazon, Staples, Grainger, and Lowe's. To gain access:

- Contact Rick Presnell or Jannie Choice to be added to the PunchOut group in Workday.
- Attend a PunchOut training session, as required by the Procurement Office.

II. 6 Credit Card Purchases

University credit cardholders may make authorized business-related purchases within their card transaction limits, consistent with Policy 370.4, Credit Card Program, and the Credit Card Program Guidelines.

[Browse – Workday Help @Furman](#)

- Temporary Limit Increase: To request a temporary limit increase for purchases over \$5,000, email three quotes or a completed Sole Source Justification form to the Director of Procurement.

II. 7 Supplier Invoice Requests

A Supplier Invoice Request may be used instead of a Requisition/Purchase Order when all of the following apply:

- The purchase amount is under \$3,000 or below your procurement card limit.
- The supplier does not accept credit card payments or charge fees for their use.
- The total purchase is below the \$5,000 competitive bidding threshold.

II. 8 Miscellaneous Payments (Non-Student)

Miscellaneous Payments are used for the following situations:

- One-time purchases under \$3,000.
- Cases in which the supplier does not accept credit cards or charges fees, and other standard methods are not suitable.

III. Formal and Informal Solicitations

III. 1 Informal Solicitations

Informal solicitations are quotes obtained from suppliers, typically on supplier letterhead, and are used as indicated in the purchasing thresholds above. The quotes should not be more than 90 days old.

III. 2 Formal Solicitations

Formal solicitations are Requests for Proposals (RFPs) or similar solicitations issued to suppliers to obtain pricing or service proposals for goods and services. RFPs may be issued by Department Heads or by the Procurement Department.

IV. Contract Approval and Signature Authority

IV. 1 General Information

Only authorized University officials may sign contracts. Employees must follow the established approval process to avoid conflicts of interest and to ensure fiscal responsibility. The University does not consider a contract valid unless it is signed by an authorized official, as defined in these Guidelines. See the Contract Development and Review Process: [Office of the General Counsel | Furman University](#)

IV. 2 Contract Approval Guidelines

IV. 2.1 General Approval

- \$25,000 or less: Reviewed by the Director of Procurement and signed by a President's Cabinet member.
- Over \$25,000: Reviewed by the Director of Procurement, approved by a Cabinet member, and signed by the Vice President for Finance & Administration.

IV. 2.2 Exceptions

- Leases: Reviewed by the Director of Procurement and signed by the Vice President for Finance & Administration.
- IT contracts: Signed by the AVP of Technology.
- Entertainment contracts: Signed by the event host.
- Real estate: Requires legal review and approval by the Vice President for Finance & Administration.
- Construction contracts: Reviewed by Facilities Services and signed by the Vice President for Finance & Administration.

IV. 2.3 Authority Delegation

- The President may sign any contract.
- If the Vice President for Finance & Administration is unavailable, authority is delegated to the Associate Vice President for Finance or the Controller.
- Additional details on the contract review process can be found in the University's Contract Process materials on the General Counsel's website.

V. Suppliers

V.1 Supplier Relationships

Suppliers are selected based on their ability to provide quality products or services at competitive prices while meeting the University's requirements. All selected suppliers must submit a W-9 form to the Accounts Payable Office for approval. See Section V.2, New Supplier Setup.

Unsolicited Sales Contacts

Refer unsolicited sales contacts to the Procurement Office. Some suppliers may require a completed credit application before accepting University Purchase Orders. Such applications should be forwarded to Accounts Payable.

V.2 New Supplier Setup

See "Supplier Request" in the [Browse – Workday Help @Furman](#) section for instructions on adding new suppliers.

VI. How to Pay

VI.1 Paying for Purchase Orders

After goods or services are received and accepted, a receipt must be created in Workday before the invoice can be processed for payment. This process follows the issuance of a Purchase Requisition and Purchase Order. Refer to the Workday, Help, Finance instructions for creating a receipt for goods and services.

[Browse – Workday Help @Furman](#)

VI.2 Paying with Credit Cards

All credit card transactions must be verified and approved in accordance with the Credit Card Program Guidelines. See Workday, Help, Finance for instructions on how to Verify Procurement Card Transactions.

[Browse – Workday Help @Furman](#)

VI.3 Paying with Supplier Invoice Requests

Supplier Invoice Requests replace the former paper invoice/check request process for transactions under \$3,000. For amounts over \$3,000, a Requisition/Purchase Order must be created. Contact the Procurement Department for assistance, as needed.

VI.4 Paying via Miscellaneous Payments (Non-Student)

Miscellaneous Payments replace ad hoc payment requests for individuals or organizations not affiliated with Furman and are typically used for transactions under \$3,000. Attach the required completed W-9 form and all relevant backup documentation.

VII. Change Orders

If a Purchase Order needs to be altered, for example, due to a quantity change, cancellation, or unforeseen cost adjustment, email the requested change to jannie.choice@furman.edu before issuing any verbal changes to the supplier.

VIII. Additional Guidelines

The following additional policies and guidelines are relevant to the procurement process. For direct links or detailed instructions, refer to the Procurement Services section of the University website or intranet.

- 1. Rebates and Rewards.** All rebates or rewards earned from University purchases belong to the University and must be used for other University expenses.
- 2. Debarment Certification.** Purchases of \$25,000 or more involving federal funds must be cleared for Federal Debarment before an order is issued. A Debarment Certification letter must be submitted by the supplier and attached to the Purchase Requisition. The form is available on Furman's website under MyFurman → Employee Forms → Purchasing Folder.
- 3. Purchase of Safety and Protective Equipment.** Coordinate these purchases with your Department Head and the Risk Management Office. Equipment must comply with all applicable federal and state laws and regulations, including Occupational Safety and Health Administration (OSHA) requirements.
- 4. Modification of Furman-Owned Buildings.** Any service that alters University buildings, whether on or off campus, requires review and approval by Facilities Services to ensure compliance with building codes, insurance requirements, and maintenance standards.
- 5. Green Purchasing.** Departments are encouraged to purchase recycled or otherwise environmentally preferable products whenever possible. Follow the Green Purchasing Guidelines on the MyFurman website under Employee Forms → Purchasing Folder.
- 6. Insurance Requirements.** Contractors must meet the minimum liability insurance requirements established by Risk Management. Exceptions require prior approval from the Risk Management Office.
- 7. Terms and Conditions.** Suppliers are expected to accept the University's standard terms and conditions. Any deviation requires review by the University's General Counsel and/or the Director of Procurement. The standard terms and conditions can be provided upon request.
- 8. Preferred Suppliers and Contracts.** The University maintains agreements with preferred suppliers for frequently purchased items and participates in consortium contracts such as E&I, OMNIA, and Sourcewell. Departments should use preferred or consortium suppliers when appropriate to secure the best pricing. The list of these suppliers can be found in the Help, Finance section of Workday.
- 9. Approvals.** Purchase Requisitions are routed through Workday and processed into Purchase Orders. Credit card transactions must comply with the Credit Card Program Guidelines and receive the required departmental approval. Approvers may delegate authority in Workday when absent.
- 10. Invoice and Payment.** The requester is responsible for helping ensure the supplier is paid on time according to agreed terms, once goods or services are received and accepted. For non-credit card transactions, the supplier must submit an invoice that references the Purchase Order number, includes item descriptions and amounts, and reflects the requester's approval.
- 11. Deposits (Advance Payments).** If a supplier requires a deposit, the deposit invoice should be submitted to Accounts Payable with the requester's approval before payment is issued.

IX. End of Document

These Guidelines are intended to provide a clear, consistent guide to the University's procurement processes. Please consult the Procurement Office or the applicable policy, procedure, or form for additional information.