



PURCHASING

GUIDELINES

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General Purchase Guidelines

1. Unless otherwise directed by the Executive Director of Finance, Shared Services & Department Operations or the Vice President of Student Affairs, all purchases must be pre-approved via Owl Central prior to creating any Workday business processes or pcard purchases.
2. All purchases made in the State of Florida must be tax exempt.
3. Unless otherwise directed by the Executive Director of Finance, Shared Services & Department Operations or the Vice President of Student Affairs, when the purchase is for an event, the purchase pre-approval requests must be submitted at least **10 days** prior to an event (**3 days** for Blanket POs and **24 hours** for Pcard purchase requests).
4. With the exception of pcard purchases, only do business with vendors registered with FAU.
5. Unless prior permission is given for staff to be reimbursed, all purchases are made via Pcard, Blanket Purchase orders or via the University's Requisition/Purchase Order process.
6. Purchases made for giveaways and prizes are subject to a \$100 maximum per item.
7. Unless directed by the Executive Director of Finance, Shared Services & Department Operations or the Vice President of Student Affairs, all promotional item purchases must be made with licensed vendors and via Student Affairs Marketing and cannot be made on Pcard.
8. Unless directed by the Executive Director of Finance, Shared Services & Department Operations or the Vice President of Student Affairs, all printed items must be made via Student Affairs Marketing and cannot be made on Pcard.

9. All purchases for Performers and Equipment Rental must be accompanied with an executed contract signed by the vendor and FAU legal representation. It can take up to **30 days** to obtain an executed contract.
10. Except where food waivers have been obtained, all catering purchases must be made with Chartwells, FAUs contracted caterer.
 - Private events such as BPW daily preparing of meals for house members or meals prepared in residence hall kitchens for residents do not require food waivers/permits but must follow food safety protocols.
 - Pre-packaged foods, pre-packaged snacks or food platters from Publix/Walmart do not require food waivers/permits but food safety protocols must be followed.
11. Food waivers and permits must be requested **10 days** prior to an event through the Environmental Health and Safety department.
12. All beverage purchases must be Coca Cola products.
13. Food items requiring food waivers/permits cannot be purchased using a Pcards.
14. Gift cards and vouchers cannot be purchased.
15. Pcard purchases may not exceed single purchase limit. Charges may not be split to avoid single transaction limit.
16. All Pcard purchases must adhere to all State and University purchasing regulations.
17. Pcards are for official University business ONLY. All personal purchases are strictly prohibited.
18. State tax should not be charged on the Pcard for purchases within Florida. Tax exemption is not honored on travel and purchases outside Florida.

General Purchase Guidelines Con't

19. Travel must be pre-approved via spend authorization at least **5 days** prior to trips. An Owl Central approved Pre-Approval and supporting documentation must be attached to the Spend Authorization. Each person traveling must be named in a spend authorization.
20. Each person traveling that is expecting reimbursement must complete his/her own Spend Authorization.
21. When students are traveling, an approved notification to travel, name and Z#s of each student, and signed waivers for each student, must be attached to the spend authorization of a person traveling on the trip.
22. Expense reports (Travel Reimbursements) must be submitted and approved in Workday within 30 calendar days of the end of the travel period (Due to fiscal year closing, due dates may change for travel at the end of the fiscal year).

Completing Food (Non-Blanket) Purchase Request

A food non-blanket purchase is for food purchases that are not associated with an existing blanket purchase order. Contact your department finance manager to inquire about existing blanket purchase orders. Use the following steps to prepare your purchase pre-approval for submission to Department Finance:

1) Verify that your vendor is registered with FAU

Contact Finance staff to verify that the vendor is registered with FAU. If your vendor is not registered you will have to complete the *Create Supplier Request* process ([Click here](#) for a job aid).

2) Obtain Quote from Vendor

3) Obtain a Food Waiver from the Business Services Office

Food Waivers should be requested at least **20 business days** before your event to allow enough time to submit your purchase request to Financial Operations. Business services requires at least **10 business days** to process food waivers. [Click here](#) to obtain a Food Waiver Application.

4) Submit your purchase request to Department Financial Operations

Your purchase request *must* be submitted to the Department Financial Operations via Owl Central at least **10 business days** prior to your event and *must* contain the following:

- 1. Itemized Vendor Quote**
- 2. Approved Food Waive**

5) Financial Operations will notify you of your approved purchase along with next steps to follow to complete your purchase request.

Existing Chartwells Blanket Purchase Order Purchase Request

A Chartwells purchase order allows you to easily make food purchases on campus without creating documents in Workday. If your department has a blanket purchase order with Chartwells, use the following steps to prepare your purchase pre-approval for submission to Department Finance:

1) Obtain Quote from Vendor

For Chartwells, visit their website at www.fau.catertrax.com or call their office at 561-297-2788.

2) Submit your purchase request to Department Financial Operations

Your purchase request *must* be submitted to Department Finance via Owl Central at least **3 business days** prior to your event and *must* contain the following:

- **Itemized Vendor Quote**

3) Financial Operations will notify you of your approved purchase along with steps to follow in order to complete your purchase request.

Performer or Event Equipment Rental Purchase Request

A performer or event equipment rental purchase is used when you bring a performer, speaker, or artist to campus or you rent equipment such as staging or lighting for an event. Use the following steps to prepare your purchase pre-approval for submission to Department Finance:

1) Obtain Contract Endorsed by FAU Purchasing

You should obtain the contract at least **60 business days** prior to your event. For more information on obtaining or submitting contracts to be endorsed by purchasing contact Mathew Hinds, Contract Specialist at mhinds2@fau.edu .

2) Verify that your vendor is registered with FAU

Contact Finance staff to verify that the vendor is registered with FAU. If your vendor is not registered you will have to complete the *Create Supplier Request* process ([Click here](#) for a job aid).

3) Submit your purchase request to Department Financial Operations

Your purchase request **must** be submitted to Department Finance via Owl Central at least **10 business days** prior to your event and **must** contain the following:

- **Completely Endorsed Contract**

4) Financial Operations will notify you of your approved purchase along with steps to following in order to complete your purchase request.

Printed Item or Promotional Item

Printed items are publications, flyers, and posters. Promotional items are giveaways such as cups, pens, and t-shirts. Use the following steps to prepare your purchase pre-approval for submission to Department Finance:

1. Obtain quote from Student Affairs Marketing Services

To obtain a quote from Marketing Services put in a ticket request at the following link:

<https://helpdesk.fau.edu/TDClient/Requests/ServiceCatalog?CategoryID=4427>

2. Submit your purchase request to Department Financial Operations

Your purchase request *must* be submitted to Department Finance via Owl Central at least **10 business days** prior to your event and *must* contain the following:

- 1) Vendor Quote from SA Marketing
- 2) Email from SA marketing resolving your request

3. Financial Operations will notify you of your approved purchase, along with steps to follow in order to complete your purchase.

Purchase Card Purchase Request

Pcard purchases are used to make any purchase except where the pcard guidelines prohibit. Use the following steps to prepare your purchase pre-approval for submission to Department Finance:

PLEASE NOTE: Food (other than from Publix or prepackaged snacks), promotional, publication, or printed items (other than Toshiba on campus) can NOT be ordered via P-card

1) Provide list of items to be purchased

Provide a list of items to be purchased along with estimated cost or provide a copy of an online shopping cart.

2) Submit your purchase request to Department Financial Operations

Your purchase request ***must*** be submitted to the Department Financial Operations via Owl Central at least **10 business days** prior to your event and ***must*** contain the following:

- **Estimated Cost**

3) Financial Operations will notify you of your approved purchase along with next steps to follow in order to complete your purchase request.

Technology Purchase Request

A technology purchase is the purchase of computers, software, etc. Use the guidelines below to make this type of purchase:

1) Obtain a quote from Student Affairs Information Technology

Submit a ticket to Student Affairs Technology at the following link to request a quote for the items you wish to purchase:

<http://www.fau.edu/student/technology/> .

2) Submit your purchase request to Department Financial Operations

Your purchase request *must* be submitted to Department Finance via Owl Central at least **10 business days** prior to your event and *must* contain the following:

1. Vendor Quote from SA Marketing
2. Email from SA technology resolving your request

3) Financial Operations will notify you of your approved purchase, along with steps to follow in order to complete your purchase

On Campus Department Purchase Request

An on campus department purchase request is used to pay or reimburse an on campus department other than Toshiba. Toshiba can only be paid with a pcard; use the steps below to make an On Campus Department purchase request:

1) Obtain Quote from Department

2) Submit your purchase request to Department Financial Operations

Your purchase request *must* be submitted to the Department Financial Operations via Owl Central at least **10 business days** prior to your event and *must* contain the following:

- **Department Quote**

3) Financial Operations will notify you of your approved purchase, along with steps to follow in order to complete your purchase.

FAU Trademark Business Card, Stationary or Name Badge Purchase Request

Use the following steps below to purchase official FAU Trademarked business cards, stationary or name badges:

1) Obtain Pricing

[Click here](#) to obtain pricing for business cards and stationary and to download form for proof.

[Click here](#) to download a name badge form.

2) Submit your purchase request to Department Financial Operations via Owl Central

Your purchase request *must* contain the following:

- **Business card or stationary proof or name badge form**

3) Financial Operations will notify you of your approved purchase, along with steps to follow in order in to complete your purchase.

Office Depot or Staples Purchase Request

Use the process below to purchase office supplies when you do not have a pcard available:

1) Obtain Quote from Vendor

- 1) Type *Connect to Supplier Website* in Workday.
- 2) Click on *Connect to Supplier Website* and choose desired vendor.
- 3) Complete and print out the shopping cart from the supplier's website.

2) Submit your purchase request to Department Financial Operations via Owl Central
Your purchase request ***must*** contain the following:

- **Shopping Cart**

3) Financial Operations will notify you of your approved purchase, along with steps to follow in order in order to complete your purchase.

Staff Reimbursement Purchase Request

This type of purchase must be pre-approved. This type of purchase is used to reimburse staff for purchases when pcard and purchase orders are not accepted by a vendor or for emergencies. Follow the steps below:

- 1) **Provide a list of items you wish to purchase along with estimated cost**

- 2) **Submit your purchase request to Department Financial Operations**
Your purchase request *must* be submitted to the Department Financial Operations via Owl Central at least **10 business days** prior to your event and *must* contain the following:
 - **Estimated Cost**

- 3) Financial Operations will notify you of your approved purchase, along with steps to follow in order to complete your purchase.

Staff Travel Purchase Request

Use the following steps to submit pre-approval for Staff Travel expenses:

- 1) **Gather your estimated trip cost to include but not limited to: Airfare, hotel, ground transportation, etc.**

- 2) **Submit your purchase request to Department Financial Operations**
Your purchase request *must* be submitted to the Department Financial Operations via Owl Central and *must* contain the following:
 - **Estimated Cost**

- 3) Financial Operations will notify you of your approved purchase, along with steps to follow in order to complete your purchase.

General Purchase Request

General purchases are those purchases that do not fall in any of the above categories; use the following guidelines to make this type of purchase:

1) Verify that your vendor is registered with FAU

Contact the controller's office at 7-3117 to verify that the vendor is registered with FAU. If your vendor is not registered you will have to complete the *Create Supplier Request* process ([Click here](#) for a job aid).

2) Obtain Quote from Vendor

3) Submit your purchase request to Department Financial Operations

Your purchase request *must* be submitted to the Department Financial Operations via Owl Central at least **10 business days** prior to your event and *must* contain the following:

- **Itemized Vendor Quote**

4) Financial Operations will notify you of your approved purchase along with steps to following in order to complete your purchase request.