Purchasing Guidelines
Contracts and
Signatory Authority

Tally Thrasher, Executive Director of Purchasing
WHEN IS A CONTRACT REQUIRED?

• Services performed over $10,000
• Services under $10,000 which involve an agreement or are high-risk
• International services over $5,000
• Supplier presents a contract to department
SIGNATORY AUTHORITY

Who can sign a contract?

Purchasing authority is vested in the Board of Trustees and delegated through the President and CFO to:

- University Treasurer
- AVP of Procurement Services
- Purchasing Contract Managers

These individuals may legally sign contracts on behalf of the university.
REQUESTING A CONTRACT

A contract is required for goods as well as services. If there is a contract associated with your purchase, this Contract Request Form must be completed.

Please complete this form to get your contract set up as quickly as possible.

- Any attachments, of any kind regarding this contract, should be attached in the "Attachments" section. Attachments can include supplier contracts, Statements of Work, price quotes, etc.
- There are 3 types of contracts to be selected from on the Questions General Contract Information screen. The definitions of contract types:
  1. Agreement for Services - Use for contracts for any type of service. Also, if a contract is needed for goods with a Services component (i.e., installation), select both agreement for Services and agreement for Goods in the questions.
  3. Performers / Speakers / Performing Artists - Use for performers, speakers, and performing Artists.

- After completing this Contract Request Form, submit a Requisition for the services with a note added showing the name of this Contract Request. Agreements will not be prepared until a Requisition has routed to Purchasing with all approvals.
SUPPLIER-PROVIDED CONTRACTS

What do you do with them?

- Complete a Contract Request Form
- Attach the contract to the Request Form
- Reference the Contract Request Form name and Form number in the Comments section of the Requisition
WHAT IF THERE IS NO REQUISITION?

For instance: P-Card payments or agreements without payment which require a contract

• Complete a Contract Request Form
• Attach supplier-provided documentation as available
• Log a Comment stating no Requisition is required
SO BASICALLY...

• Departmental staff **may not** sign agreements on behalf of the university

• If you need a contract, submit a Contract Request Form

• If your supplier provides a contract that needs signed, submit a Contract Request Form

The Contract Management tool in BUY.IU allows Purchasing to search for and manage contracts more efficiently
Questions on contracts or signatory authority?
PO RE-ENTRY

What needs to be re-entered in BUY.IU?

• POs that extend past June 30, 2019

• If possible, re-enter the current version of the KFS PO in BUY.IU as a new Recurring Order - documentation available

• Close the KFS PO to release KFS encumbrances

• Reference KFS PO number in “Previous PO#” field in BUY.IU

• If PO remains open in KFS past June 30, payments can still be made via KFS
LOCATING BLANKET ORDERS

How do I know what blanket orders I have?

Three ways:

• IUIE: Recurring Orders
• IUIE: Recurring Orders by Username
• KFS: Open Encumbrance GL lookup
• FMS Documentation Library reference page
IS A RECURRING ORDER NECESSARY?

Do you really need a Recurring Order? This is a great time to re-evaluate!

Recurring Orders should be used for:

• Lease/rental payments
• Utility payments
• High volume, small dollar, recurring purchases to a contracted supplier

Otherwise, enter a one-time PO with a specific quantity.
SUPPLIER CONVERSION

• Converted suppliers with email address on file have been notified
• 200+ suppliers have updated their information
• Additional suppliers being reviewed/invited daily
• Visit the For Suppliers page on Purchasing’s site for a copy of the conversion email
• May also view supplier onboarding video
MY SUPPLIER DIDN’T GET AN EMAIL!

• Email the Supplier Workgroup: supplier@iu.edu

• In your email include:
  • Supplier email address
  • KFS Vendor name and number (if possible)

• Purchasing will send invitation to supplier
  • Invitation must come from Purchasing
SUPPLIER INFO FLYER

Indiana University is part of Jaggaer, a leading procure-to-pay system. Before doing business with IU, you must join our supplier network.

Becoming an IU supplier is as easy as one, two, three...

1. Join the Jaggaer network
   You will receive an email from Indiana University inviting you to join the Jaggaer network. Be sure to add supplier@iu.edu to your address book so the message isn’t filtered as spam. Click Register Now in your invitation email to get started.

2. Complete the registration process
   Complete your supplier profile. Your invitation email contains a link to a short video which details the registration process. Be ready to provide your business information, upload signed tax forms, and enter payment information. Once all you have entered and reviewed your information, submit it to IU via the portal.

3. Congratulations! You’re an IU supplier
   The IU Supplier Workgroup will review your information and contact you with any questions. When your profile is approved, you will receive an email notification from support@scQuest.com. You're now ready to do business with IU.
   Hang on to your supplier portal login information. You will log in using this information if you need to make changes to your profile.

Questions? Need help?
Contact us!
Email: supplier@iu.edu
Phone: (812) 855-3720

• Departments may print or email flyer to supplier

• Available on the For Suppliers page
OFFICE HOURS

• May attend in person and/or online
• Visit https://go.iu.edu/buyiu for registration link
• Topics include:
  • Placing a non-catalog order
  • Placing a recurring order (aka a blanket Purchase Order)
  • Open — attendee questions
**REMINDER: IMPORTANT DATES**

<table>
<thead>
<tr>
<th>Date</th>
<th>Event</th>
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<tbody>
<tr>
<td>TBD</td>
<td>FY20 BUY.IU REQ entry begins</td>
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<tr>
<td>May 31</td>
<td>KFS REQ entry FY19 cutoff</td>
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<td></td>
<td><strong>Note:</strong> Purchasing assisted orders</td>
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<tr>
<td>June 14</td>
<td>KFS Shop Catalog FY19 cutoff</td>
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<tr>
<td>June 30</td>
<td>KFS vendor entry cutoff</td>
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<tr>
<td>July 1</td>
<td>FY20 PO release</td>
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<td></td>
<td>KFS DV and REQ entry suspended</td>
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<td>BUY.IU Check Requests available</td>
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</table>
STAY IN THE LOOP

BUY.IU website:  https://go.iu.edu/buyiu

• Subscribe to the BUY.IU news list!
• Review written and video documentation

Email:  askbuyiu@iu.edu