

Getting Started

There are three main categories of information in this Buying Manual:

1. Topics of interest to all individuals initiating a transaction on behalf of the university
2. Transactions that do not require a purchase order
3. Transactions that require a purchase order

We recommend that everyone read the [General Information](#) section, which covers topics for every person at Cornell who initiates transactions. Included in this section is the topic [Requirements for Vendor Selection and Order Creation](#), which outlines the requirements for placing orders through Cornell's e-procurement tool (e.g., e-SHOP) and for utilizing Preferred Suppliers.

If you are initiating a purchase where authority for review and approval of that good or service has been [delegated to a specialized unit](#) (for example, a real estate transaction) or for [tangible goods that do not require a purchase order](#) or for travel, see [Paying for Goods and Services that Do Not Require a Purchase Order](#). This section includes information on non-purchase order payment methods that may be utilized (e.g., procurement card, direct payment by check or electronic equivalent method, and payment options for business travel).

If you determine that a purchase order is necessary, refer to [The Purchase Order Process](#), which describe the types of purchase orders available, the requirements for bidding, and additional requirements that apply to certain goods, services, and sources of funds. Please also note the section on [Purchases with Special Procedures](#), which include certain sensitive goods and services and orders that are funded by New York State appropriated funds.

The section on [Procurement Programs](#) is also of interest to everyone because it explains the areas in which Procurement Services has proactively developed progressive programs. These include preferred supplier agreements, commitments to supplier diversity, and programs that support the university's goals in environmental sustainability.

Recommended Steps

1. Please ensure that your intended purchase is an allowable business expense for which University funds may be expended under [University Policy 3.14, Business Expenses](#).
2. Determine if the good or service that you want to purchase is covered by a [preferred or contract supplier agreement](#).
3. If Procurement Services has negotiated an agreement with a supplier for the commodity (good or service) that you are purchasing, then you should purchase that commodity from the preferred or contract supplier. Otherwise, refer to the supplier utilization hierarchy in [Section 102](#).
4. Determine the appropriate procurement method. To assist you in making the determination, refer to the Procurement Decision flowchart in [Section 200](#).
 - a. If the supplier is available in e-SHOP, then begin your requisition in e-SHOP as it simplifies the data entry and ensures you receive the discounted pricing.
 - b. If the vendor is not available in e-SHOP, then you must determine whether the purchase is eligible for payment via pcard or disbursement voucher (DV). Please reference prohibited pcard transactions ([Section 302](#)) and direct payment via DV ([Section 203](#)).
 - c. If not eligible for purchase via pcard or DV, then you must use a purchase order (PO).
 - i. If the good or service that you wish to purchase is not covered by a preferred or contract supplier agreement, then utilize the Find a Supplier search feature in [Spend Viz](#) to determine if an existing supplier provides the commodity.
 - ii. If a supplier is not available in KFS, then you may request a new supplier.
5. In situations where a preferred supplier agreement does not exist and the purchase amount exceeds the formal bid limit of \$10,000, a vendor is selected through competitive bidding, unless an appropriate justification and an alternative method of selection are specifically authorized by a Procurement Agent (refer to [Section 400](#)).