Purchasing Services - Standard Operating Procedure [S.O.P.] – Purchase Order

UNIVERSITY
of GUELPH

CHANGING LIVES
IMPROVING LIFE

PROCESS:	iProcurement Electronic Requisitioning for Purchase Order
Subject:	Questions & Answers

Financial Services   **N.B.**: This website changes frequently. Please refer to http://www.fin.uoguelph.ca FORMS>Purchasing Services – Standard Operating Procedures [S.O.P.] for the most recent version of this document (Form_SOP_PO_iPROQAD2.pdf).

Question #1:   **Please describe the function for each *name* shown in requisition screens?**

Answer #1:   Names and functions are as follows:

System Name	Function(s)
Preparer	The person that logs in (with User ID & password) to iProcurement and **enters the requisition**, attaches the necessary documents, and then **submits** it to Purchasing Services. The Preparer's name appears in all records regarding requisitioning activity even if not shown on the iProcurement screens. All requisitions prepared and submitted by this person will be listed under his/her name only.
Ship To Contact	The person **to whom the goods will be shipped** or provides oversight of the services performed, a.k.a. "Ship To the Attention of." This name **can also be** the person that performs the **receiving** function for the goods/services, if desired.
Requester	The person that has **approval for the budget** under which the goods/services are ordered. This may be defined by internal approval level by dollars, funds prescribed for specific use (research – principle investigator; projects, special events – authorized person, etc.).

Approver	The person who regulates and records the purchases through the **review and approval of specific regulated goods/materials**, specifically:
	
	  Live Animals (all vertebrates) - Animal Care Coordinator
	  Radioactive goods/materials - Radiation Officer
	  Biohazardous substances - Bio-safety Officer

Suggested Buyer	The person in Purchasing Services **who will receive and process the requisition** once submitted. There can be **only one** Suggested Buyer **per requisition.**

Question #2:   **Why are new requisitions named "Non-Catalogue Requests?"**

Answer #2:   First consider what a Catalogue Request is. While we do not use this function in iProcurement, a Catalogue Request allows the preparer to create a requisition from a list of items populated in the system. The University is not maintaining such a list in iProcurement.

As we are entering a **requisition in free form text,** it is considered a **"Non-Catalogue request" for a requisition**.

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Question #3:   **For what reasons would requisitions be returned to me?**

Answer #3:   If not yet created with a purchase order number, the suggested Buyer <u>may</u> return the requisition for the following reasons:

1. At the request of the preparer or his/her supervisor.
2. To change or correct:
   a. Category/Commodity code
   b. Currency
   c. Supplier

The Suggested Buyer **<u>must</u>** return a requisition if the **Item Type** is to be changed/corrected.

If the requisition is correct in its "complete submitted" form, it can be copied by the Preparer at a future time and updated to reflect a new request.

Question #4:   **How do we interpret Category Code (commodity) and what happens if we get it wrong?**
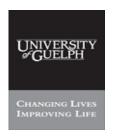
Answer #4:   Category Codes have been ***developed to route requisitions to the appropriate Suggested Buyer*** (Procurement & Contracting Officer or Assistant Manager) and to collect business/industry intelligence. At this time there ***is no method of creating a connection*** between the ***Category Codes*** and the ***Suggested Buyers*** within the system.

The ***Category Codes*** are divided into ***6 primary groups***, making it ***easier to find the code*** you are looking for. These groups are:

Grouping of Categories (commodities)	
1.	Agriculture & Horticulture
2.	Construction, Renovation & Trades (Capital work, off Guelph campus only, not main campus) (supplies, materials & equipment – all regions)
3.	Life Science (animal & human)
4.	Administration, Teaching & Student Life
5.	Information Technology
6.	Travel & Transportation

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For each Category the following Types can be selected:

CATEGORY (Commodity Code & Description) *"Category" Example from list*		TYPE Code & Descripton *Available –"Types" to be used*	
AGR1	agricultural & horticultural vehicles & implements	**ATS**	analytical & testing services
		CPS	consulting & processional services
		EQUIP	equipment & systems
		MAIN	repair, preventative maintenance & support
		SERV	labour, expenses, travel, leases, etc.
		SUPP	supplies, materials, parts, etc.
EXAMPLE: Category & Type combination			
AGR1	- agricultural & horticultural vehicles & implements		
MAIN	- repair, preventative maintenance & support, etc.		

TIP: We have put together a guide – Appendix A in the Standard Operating Procedure to assist you in getting the right Category (Commodity) Codes.

Before using iProcurement, *spend some time* going through this appendix and *highlight the codes* most *frequently used*. If in doubt, call any of our Procurement & Contract Officers or Assistant Managers for clarification. This will make it easier to find and enter the right Category Code when preparing requisitions.

Question #5:   **How are approvals handled in iProcurement?**

Answer #5:   Approvals are managed within your department using whatever forms and practices currently in place. The process must be consistent with the General Policy, GE 5.0 Delegation of Authority for the Commitment of University Funds upon Budget Allocation.

The User Application, Requisitioning and the subsequent instructions in the Standard Operating Procedure verifies that the User entering the requisition has the delegated responsibility or authority to do so.

Question #6:   **What if I process requisitions infrequently? How will I get reacquainted with iProcurement and the process?**

Answer #6:   Purchasing Services is developing an on-line interactive training program which will be located at our Financial Services website, and available 24/7 - 365.

You may also call Purchasing Services – iProcurement Help Desk (ext. 58482) during normal University business hours.