



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

PROCESS:	iProcurement Electronic Requisitioning for Purchase Order
Subject:	Applying for User I.D.

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_iPROAPPD1.pdf).

INTRODUCTION

Purpose: To define the process for applying for user access to Oracle – iProcurement program. This is the University of Guelph’s on-line electronic requisitioning system for purchases over \$3,000.

Scope of Use: For the requisitioning of goods and services as follows:

1. All goods & services to be purchased using operating, research and specially designated funds.
2. Only those purchases where the value exceeds \$3,000.
3. All live animals (vertebrates) purchased with a value greater than/equal to \$.01.
4. All biologically hazardous materials purchased with a value greater than/equal to \$.01.
5. All alcohol (denatured) purchased with a value greater than/equal to \$.01.
6. All radioactive materials purchased with a value greater than/equal to \$.01.
7. Consulting Services purchased with a value greater than/equal to \$25,000.
8. **Exceptions:**
 - Construction, trade work, renovations, building maintenance, utilities on main Guelph campus.
 - Hospitality and retail, supplies and services, on the main Guelph campus.

This procedure applies to all administrative and academic departments of the University of Guelph.

Responsibility: All University staff whose job includes the preparation of purchase requisitions for the goods and services named above.

GOVERNING UNIVERSITY POLICIES

- General Policy: **GE 5.0 Delegation of Authority for Commitment of University Funds Upon Budget Allocation**
Reference: <http://www.fin.uoguelph.ca/policies/index.cfm>> Financial Services> Policies and Procedures> General Policies
- Financial Policy: **FI 18.0 Purchasing Policy**
Reference: <http://www.fin.uoguelph.ca/policies/index.cfm>> Financial Services> Policies and Procedures> Financial Policies
- Computing & Network: **Acceptable Use & Policy Guidelines**
Reference University of Guelph website:
<http://www.uoguelph.ca/web/aupg/>



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PROCEDURES

PROCESS – COMPLETING THE APPLICATION

Step #1 - Employee Information

User must be responsible for the generation of current paper requisition.

Name:	First & Last name.
Unit #:	Department number where you primarily work.
Department Name:	Department number where you primarily work.
Employee Number:	As registered with Human Resources.
Email Address:	Employee email address (future distribution list).
City:	Employee geographical data entry site.

Step #2 - Access Requirements

This area identifies additional departments in which the User is authorized to prepare requisitions. Work may be performed for one or more departments.

Requisition Processing:	Check box.
Additional Unit Numbers:	If you will be preparing requisitions for more than one department, enter the first four digits each department.
Additional Unit Names:	Enter name of department for each.

Step #3 - Employee and Department Authorizations

This area confirms that the applicant is delegated the responsibility to enter pre-authorized purchase requests into the iProcurement system. In performing this task the department's funds will be committed and uploaded to the Financial Reporting System following the preparation and issuance of a Purchase Order.

Employee Signature:	Applicant to sign, print name and date. In signing this application, the applicant agrees to abide by the Declaration as stated below.
Approval Signature:	Dean/Director/Chair to sign, print name and date.

Step #4 - Tri-Council – Principle Investigator Approvals

This section prompts applicants to ensure that the documentation is in place to validate;
a) delegated expenditure authority to the applicant to prepare and submit requisitions, or;
b) delegated responsibility to prepare and submit pre-authorized requisitions, for accounts specific to Tri-Council funded purchases.



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PROCESS – REVIEW, APPROVAL & TRAINING

Step #5 - Send the completed application to:

Lynne Harbin
Purchasing Services
5th Floor University Centre
Guelph, ON N1G 2W1

Step #6 – For Purchasing Services Use Only

- o Purchasing Services will review the application.
- o Once approved, the applicant will receive an email containing their User ID and temporary password.
- o Instructions will be provided on how to gain access to the iProcurement - Requisition module and to change their temporary password.
- o Training, if not already provided, will be offered.