Consolidated Purchasing Workflow

SCENARIO A-1
Standard Configuration Ordering
(one-off, low volume)

1. Departmental requestor gives purchase request to Unit/College Purchaser (or Unit Purchaser initiates)
2. Unit purchaser uses MP vendor portal to select standard configuration machines to order (or standard base configuration with approved options). Desktops/Laptops (Program Items) are segregated in MP Portal from non-Program IT purchases (Apple, Servers, peripherals, etc). Program Items have unique Item ID that identifies them as program items.
3. Unit Purchaser creates MP req
4. Unit Financial Officer approves req
5. If <$5000, req goes to vendor for order fulfillment. If req >$5000, route to Purchasing for approval, then to vendor for order fulfillment.
6. REPORT includes Date, PO#, item code(s), Unit/OU, Purchaser ID, Dean’s Designee ID (see Reporting diagram for more details)
**Consolidated Purchasing Workflow**

**SCENARIO A-2**
Standard Configuration Ordering (large volume)

1. Departmental requestor gives purchase request to Unit/College Purchaser (or Unit Purchaser initiates)
2. Unit Purchaser prepares custom quote request based on a standard base configuration from MP (including unique MP part #) and sends to vendor
3. Vendor prepares Quote to Order and sends to Unit Purchaser
4. Unit Purchaser creates MP requisition and keys in Quote to Order #
5. If base standard configuration part # is present in quote, no additional approvals are needed. Continue normal routing through Unit Financial Officer and University Purchasing. If non-standard part # is present, treat as SCENARIO C
6. REPORT includes Date, PO#, item code(s), Unit/OU, Purchaser ID, Dean's Designee ID (see Reporting diagram for more details)
Consolidated Purchasing Workflow

SCENARIO B
Standard base model with non-standard option Ordering
(low volume & high volume)

1. Departmental requestor gives purchase request to
Unit/College Purchaser (or Unit Purchaser initiates)
2. Unit Purchaser prepares custom quote request based on a standard base
configuration from MP (including unique MP part #) and sends to vendor
3. Vendor prepares Quote to Order and sends to Unit Purchaser
4. Unit Purchaser creates MP requisition and keys in Quote to Order #
5. System applies "non-standard" flag, which triggers two additional approvals:
"Dean's Designee" (if different from Unit Purchaser) and
"Univ. Purchasing Committee". Non-Program Items
are not subject to additional approvals
(Question: if Program and non-Program items are mixed on the same
requisition, how is routing handled? Suggest purchaser education
here to not mix items on requisitions/quotes. If mixed items show up,
route entire req through full approval process.)
5a. If order is NOT APPROVED, Unit Approver/Purchaser notifies
Departmental Requestor (End User)
6. If base standard configuration part # is present in quote, auto-approve
at Committee level. Continue normal routing through Unit Financial
Officer and University Purchasing. If no standard part # is present, treat
as SCENARIO C
7. REPORT includes Date, PO#, item code(s), Unit/OU, Purchaser ID,
Unit Approver ID (see Reporting diagram for more details)
Consolidated Purchasing Workflow

SCENARIO C
Non-standard configurations
(low volume & high volume)

1. Departmental requestor gives purchase request to Unit/College Purchaser (or Unit Purchaser initiates)
2. Unit Purchaser prepares custom quote request and sends to vendor
3. Vendor prepares Quote to Order and sends to Unit Purchaser
4. Unit Purchaser creates MP requisition and keys in Quote to Order #
5. System applies "non-standard" flag, which triggers two additional approvals: "Unit Approver" (if different from Unit Purchaser) and "Univ. Purchasing Committee". Absence of a standard config item # stops request for Committee approval. Unit Approver must provide additional documentation to Committee (outside of MP). Non-Program Items are not subject to additional approvals.
(Question: In this process, how to distinguish between a non-program item (server, Apple) and a non-standard item subject to program review? Since non-standard items will not have the unique ID to create a trigger, need another way of identifying items. Perhaps use other types of commodity codes here--if it is not generically a "PC desktop/laptop item", count it as a non-program item and circumvent additional approvals process. Here again, need to educate purchasers not to mix program and non-program items on the same requisition.)
5a. If order is NOT APPROVED, Unit Approver/Purchaser notifies Departmental Requestor (End User)
6. If Committee approves, continue normal routing through financial officer and University Purchasing
7. REPORT includes Date, PO#, item code(s), Unit/OU, Purchaser ID, Dean's Designee ID (see Reporting diagram for more details)