

Quick Reference Guide: Procurement Workflow



Purpose:

Workflow is designed to ensure that Requisitions/Purchase Orders are charging proper amounts and items to the proper projects, while also ensuring compliance with Procurement policies.

Module	Initiator	If Applicable		Amount Range		
		Buyer	Restricted commodity	Under \$10k	\$10k - \$100K	Over \$100k
GL Project	Initiator	For non-catalogue above \$2.5k & catalogue above \$100k	For restricted commodities	CCM	Add CCM Supervisor to VP/Dean Level + Budget Group	Add CCM Supervisor to Senior Officer Level + COO
Non-Sponsored Project	Initiator	For non-catalogue above \$2.5k & catalogue above \$100k	For restricted commodities	TM	Add TM Supervisor to VP/Dean Level + Budget Group	Add TM Supervisor to Senior Officer Level + COO
Sponsored Project	Initiator	For non-catalogue above \$2.5k & catalogue above \$100k	For restricted commodities	TM + RASU (for specific high-risk purchases)		Add Associate Controller + COO
				Under \$50k	\$50k - \$100k	Over \$100k
Capital Project Catalog	Initiator	Over \$100k	For restricted commodities	PM + PM Supervisor	Add Controller	Add COO
Capital Project Non-Catalog	Initiator	Above \$2.5k	For restricted commodities	PM + PM Supervisor	Add Controller	Add COO

CCM- Cost Center Manager

TM- Task Manager

PM- Project Manager

