

OVC Standard Operating Procedure

BioBar Purchase Requisition



Document version: V0.1

Date: 05/16/2016

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Summary

| | |
|-------------------|---|
| Topic List | The following contents are contained in this procedure: Revision History Reviewer and Approver Block Frequency Scope Scope Exclusions OVC Policy Reference Required Applications and Systems High Level Process Overview High Level Process Map Roles and Responsibilities BioBar Purchase Requisition Process |
|-------------------|---|

Revision History

| Version Number | Change Summary | Prepared or Updated By | Effective Date |
|----------------|---|------------------------|-------------------------------|
| 1.0 | Initial Draft | Marie Ducasse | April 22 th , 2016 |
| 1.1 | Draft Review | Jimmy Weng | May 3 rd , 2016 |
| 1.2 | Re-write based on draft review | Jimmy Weng | May 5 th , 2016 |
| 1.3 | Processing BioBar Requisitions validation | Jimmy Weng | May 10 th , 2016 |

Reviewer and Approver Block

Document Contact:

- Judy Tack, Chief Financial Officer

I confirm that appropriate subject matter experts from the Operations team were part of the review and testing of this document.

Document Approver:

- Carol Ann Higgins, Chief Administrative Officer
- Judy Tack, Chief Financial Officer

Financial Clerks responsible for this process should test the validity of this document on an annual basis to ensure this document remains current. In the event of High Value Purchase Requisition processing operations need to amend this process for whatever reason, an appropriate subject matter expert(s) will be empowered to make suitable changes.

Operations:

I confirm that appropriate subject matter experts from the Financial Clerks team were part of the review of this document.

Document reviewer:

- Judy Tack, Chief Financial Officer

Process Subject Matter Expert/Team Leader:

- Sally Maclachlan, Operations Manager
- Bryan Potter, Operations Manager
- Frances Graziotto, Financial Clerk
- Karla de Uslar, Financial Clerk
- Lily Arpa, Financial Clerk

I certify that in the event of increasing escalations in support of this document, I will raise the concern with the Chief Financial Officer to initiate an SOP review. I will also provide an appropriate resource to vet future changes to this document on a standard ongoing basis.

Controls:

I confirm that appropriate controls are in place for this process and that it will be tested for accuracy on an annual basis through quality reporting.

Should an issue be identified through the quality reporting process, the concern will be escalated to the Chief Financial Officer.

Process Integrity & Change Management:

I confirm that this SOP has consulted all necessary parties to ensure an accurate depiction of the process today. All reasonable efforts have been made to eliminate any procedural gaps.

I certify that in the event that a process gap is identified, I will identify the document owner that will be accountable to close the process gap. In the event of material process changes impacting work-flow, I am responsible to raise the issue in the form of a Change Request and seek agreement from the Chief Financial Officer.

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Frequency

The frequency of the procedures in this SOP document is as follows:

- Daily
- Weekly
- Monthly
- Quarterly
- Annually

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Scope

This SOP scope includes the BioBar Purchase Requisition process, managed by the Financial Clerks. The BioBar is a co-operative endeavour among the University of Guelph Purchasing Department, the Department of Molecular and Cellular Biology and the following company suppliers:

- Biorad
- Fisher Scientific
- Life Technologies
- New England Biolabs
- Qiagen
- VWR

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Scope Exclusions

Please note that Items covered by the Low Value Purchase Requisition and Supply Managed Contracts (SMC) are not covered by this SOP. For more details, refer to dedicated SOP – Processing Low Value Purchase Requisition

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University Policy Reference

There is no specific policy related to the BioBar purchase process, however all details related to the BioBar organization and to vendors prices and available equipments can be found [here](#).

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Required Applications and Systems

| Application or System Name | Used For : |
|----------------------------|--------------------------------------|
| Footprints | Processing BioBar Requisition Forms. |

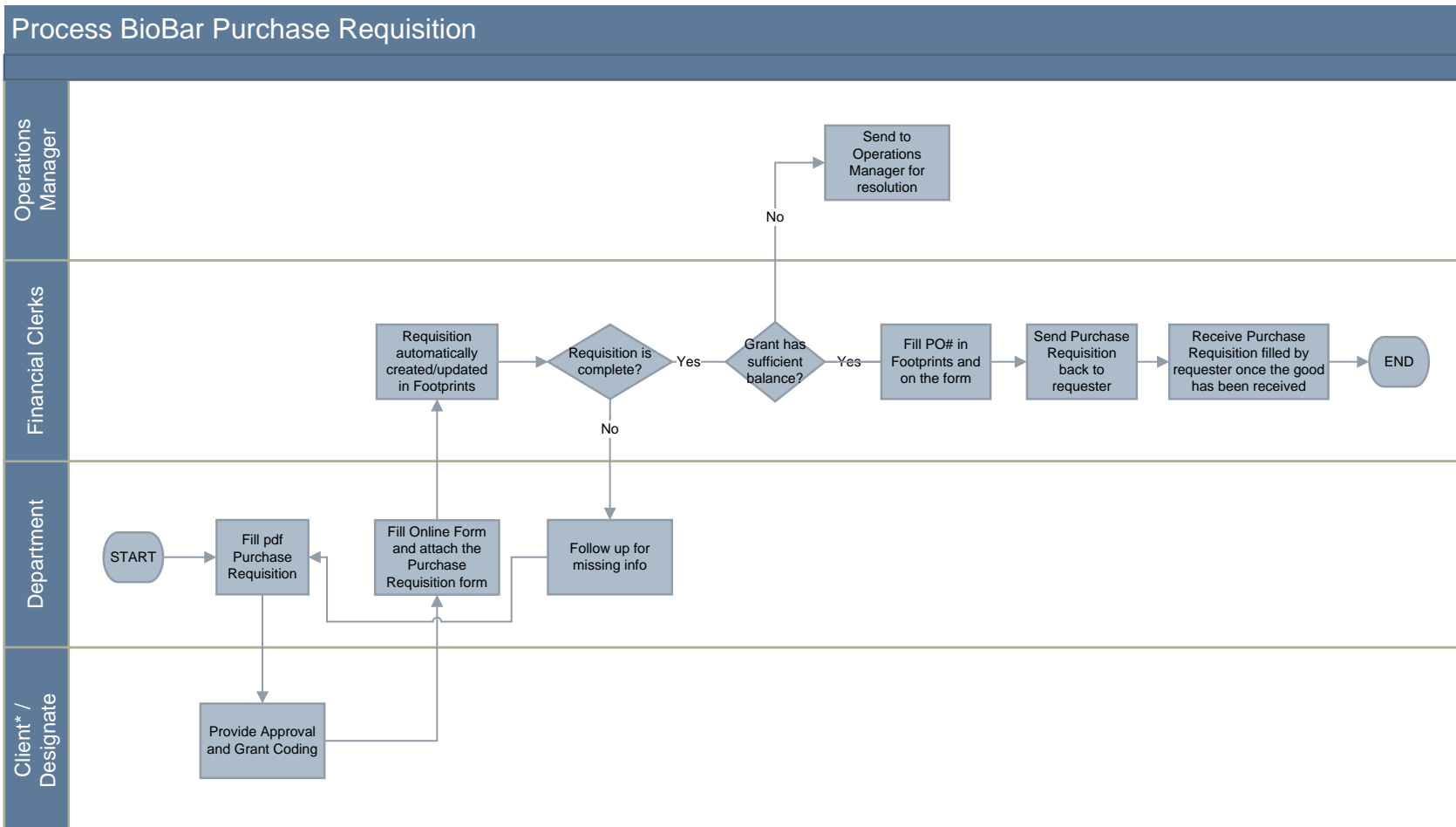
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High Level Process Overview

The following process highlights all the steps to be performed by the Financial Clerks in order to process BioBar purchase requisitions.

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High Level Process Map



* This is the person that is authorized to purchase on the funding source.

Note: This map is for context only; detailed procedures are provided below.

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Roles and Responsibilities


| Procure to Pay | | | |
|-----------------|--------------------|----------------------------|----------------------------|
| Stakeholder | | Prepare Biobar Requisition | Process BioBar Requisition |
| Internal to OVC | Technician/Student | R | I |
| | Faculty | A | I |
| | Financial Clerk | C | R |
| | Operations Manager | | A |

| Stakeholder | Description |
|-----------------|---|
| R - Responsible | Who actually completes task |
| A - Accountable | Ultimately responsible, has yes/no authority |
| C - Consulted | To be consulted prior to final decision or action |
| I - Informed | To be informed after action decision or action is taken |

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BioBar Purchase Requisition process

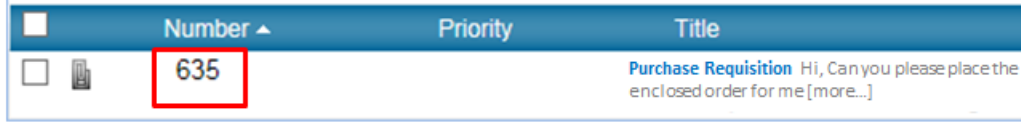
| | |
|----------------|---|
| Purpose | The BioBar Program is a co-operative endeavour among the University of Guelph Purchasing Department, the Department of Molecular and Cellular Biology and various company suppliers to allow technician or students to be able to purchase certain equipment directly onsite at the University. |
|----------------|---|

| Step | Action |
|------|---|
| 1 | <ul style="list-style-type: none"> Log in Footprints to view the BioBar Purchase Requisition:  <ol style="list-style-type: none"> Fill you user name and password unsing your central UofG login credentials Click on the "Login" button |

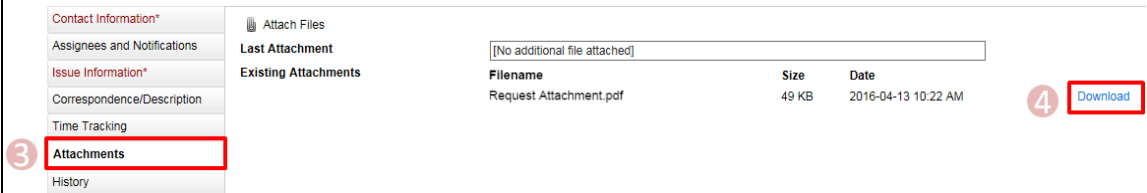
- Select “My Assignments” to see the tickets that has been assigned to you



- Click on the ticket number to open it. The ticket will open in a new web page.



3. Click on the “Attachments” tab
4. Download and print the Purchase Requisition form



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- Ensure mandatory fields are filled:

- Supplier information
- University information
- Item #
- Quantity ordered
- Part N0, Code, Description
- Price / Unit
- Amount
- Subtotal
- Tax
- Total
- Currency
- For Tri-Council?
- Import Order?
- Grant Coding
- Grant Lead Approval

Note: If information is incomplete or incorrect, please notify the requester via Footprints to send you a revised copy.

- Once you have started to work on a FootPrints ticket, manually update the status from “Assigned” to “In-Progress”:



Note: If information is incomplete or incorrect, please notify the requester via Footprints and update the ticket's status from "Assigned" to "Client Pending." If the changes required are significant (i.e. adding items), request a revised copy. If the changes required are minor (i.e. small adjustment to quantity), request the revised information and revise the requisition on the requester's behalf. The revised information must be documented in the correspondence of the FootPrints ticket.

Updated by Jimmy Weng now

Title*
Purchase Requisition

Priority*
Normal(5days)

Status*
Client Pending

Contact Information*

Assignees and Notifications

Issue Information*

Correspondence/Description

Time Tracking

Attachments

History

View Complete Correspondence/Description

Append New Correspondence/Description

Search Knowledge Base

To process this request, the additional info needs to be provided:
Please reply to this email, attaching the revised form.

- Click on the "SAVE" icon to save the ticket



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- Assign the unique PO# as "BB-20XX-####" where XX represents the current year and #### represents the FootPrints ticket number. Add this assigned numbers to the end of the Request Ticket Title
- Fill the unique # on the top right corner of the BioBar purchase requisition.
- Print and obtain signature of the Operations Manager in the "Authorized by" box
- Send the form back to the requester through FootPrints:

1. Click on the "Correspondence/Description" tab
2. Write a short description of the task to perform and any necessary comment.

Purchase Requisition

Priority*
Normal(5days)

Status*
Assigned

Contact Information*

Assignees and Notifications

Issue Information*

Correspondence/Description

Time Tracking

Attachments

History

View Complete Correspondence/Description

Append New Correspondence/Description

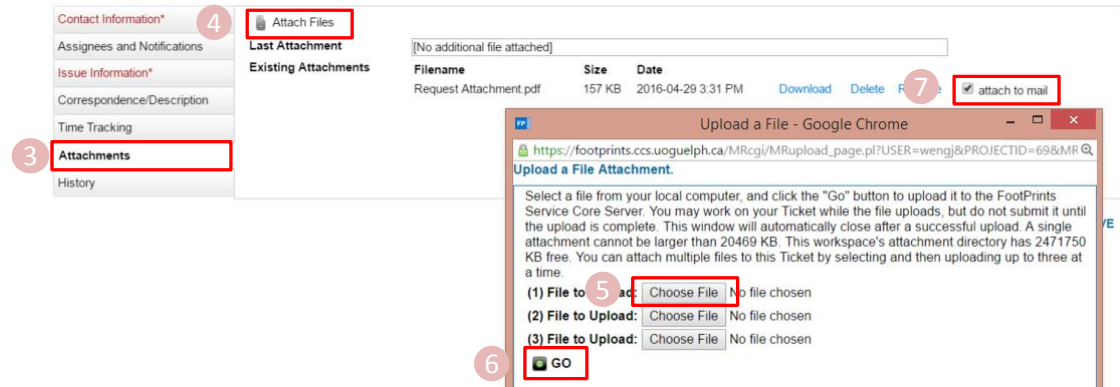
Search Knowledge Base

Hi,
Please see enclosed for approval a purchase requisition received from ... to buy I reviewed this form and added Grant coding.

Note: Specify to the requester to print the Purchase Requisition form twice, as the BioBar will

retain a copy and the requester will have to send a signed version back to you.

3. Upload the updated version of the Biobar Purchase Requisition form by clicking on “Attachments”
4. Then click on “Attach Files”
5. And click on the “Browse” button to select the file on your desktop.
6. Click on the “GO” button
7. Check the “attach to mail”



- Click on the “SAVE” icon to save and send the ticket



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- After obtaining the equipment at the BioBar, the requester will fill and sign the “Received By” box on the Purchase Requisition and send it back to you :

RECEIVED BY

| |
|------------|
| Signature |
| Print Name |

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- Once you have received the form signed by the requester file it into the Finished File and close the ticket in Footprints by selecting the “Closed” status within the ticket:

Edit Ticket 635 in OVC SAS

Title*
Purchase Requisition to buy equipment to Biobar

Priority*
Normal(5days)

Status*
Closed

- Click on the “SAVE” icon



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