

CWUR 3-10-660 Online Purchase Requisition

All purchase requisitions are created using the university's e-procurement module in the PeopleSoft Financial Management System (FMS). University departments use online purchase requisitions to initiate the purchase of goods and services through the purchasing office.

Online purchase requisitions serve to:

- Initiate acquisition of goods and services by purchase order or contract
- Initiate establishment of blanket orders for goods and services
- Initiate establishment of a university contract for goods or services
- Initiate renewal of blanket orders or contracts
- Request prepayment for allowable items (memberships, subscriptions and copyrighted material)
- Request reimbursement to employees for purchases with personal funds, that do not qualify for petty cash reimbursement ([see petty cash procedure](#)).

Departments are encouraged to use a university issued [Procurement Card \(pro-card\)](#) for allowable purchases up to \$5,000, when appropriate.

(1) Ordering Departments Responsibilities

(A) The ordering department is responsible for ensuring that adequate funds are available to purchase the ordered items.

(B) The ordering department should identify minimum technical and customer specifications, quantities, funding source, and delivery requirements for goods and services.

(C) The ordering department recommends a sole source, then completes a [Sole Source Justification Form](#)

(2) Purchasing Office Responsibilities

The purchasing office authorizes employee access to the e-procurement system, verifies that all proposed purchases are appropriate and in accordance with the policies, rules and laws of CWU, The State of Washington, and The Federal Government. The purchasing office also determines the method of procurement (pro-card, direct buy, or bid) as well as, appropriate vendor selection.

(3) Who Can Initiate a Requisition?

(A) University employees with authorized access to the PeopleSoft FMS must submit a request [form](#) and complete the required training program. Requestors must be trained prior to using the online purchase requisition module. Requestors can [contact the purchasing office for training](#) and may access the requisition user guides [on the purchasing website for reference materials](#).

(B) All approvers including, but not limited to, department/project managers, fund managers (funds 000, 145 & capital) and vice presidents will be set up with access to view and approve requisitions. Training for approvers is available by request by contacting the purchasing office.

(4) Online Requisition Approval Process

When a requestor initiates and submits an online purchase requisition into the work flow approval process, the following approvals are required:

(A) Department/Project manager approval for all speedkeys identified on the requisition

(B) Information Services approval for all information technology related goods and services on the requisition

(C) Fund manager approval when the following funds are used: foundation (000), grants (145), and all capital funds

(D) Vice president approval for all requisitions of \$25,000 or more

(5) Additional Information

Departments are encouraged to visit the [purchasing website](#) or contact the purchasing office at 509-963-1001. The purchasing office can assist with any purchasing related questions/concerns prior to, or, during the procurement process.

[Responsibility: BFA; Authority: BAC; Reviewed/Endorsed by: Cabinet/UPAC; Review/Effective Date: 02/01/2017; Approved by: James L. Gaudino, President]