Purchasing Scenarios

All purchases are done in SupplyNet
Approval chain generated automatically based on PR amount

< 25 K
• LDP
• Create PR
• PI approval
• PO will be issued and invoice paid
• Note: PI responsible for keeping all purchasing documentation

> 25 K
• Upload Quote in CFI Format
• Create PR
• PI Approval
• RSO approval
• Eligibility
• Any variances: justification
• SMS approval
• PO issued

> 75 K
• Upload Quote in CFI Format
• Eligibility
• Competitive Bid Process
• PI Approval
• RSO Approval
• SMS Approval

In Kind Contributions*
• RSA’s required purchasing documentation regardless of dollar value:
• Quote in CFI format
• Invoice
Scenario 1: Purchase Under $25K
RSO approval not required

- Attaches CFI quote
- Identifies CFI line item
- Creates a PR
- Insert @RSO Institutional Projects into comment field

**In Kind Contributions***
- RSA’s required purchasing documentation regardless of dollar value:
- Quote in CFI format
- Invoice
Scenario 2: Purchase Over $25K, Under $75K

- Attaches CFI quote
- Identifies CFI line item
- Creates a PR

Approval chain generated automatically based on PR amount
Scenario 3: Purchase Above 75K

Competitive Bid:
- SMS/PI develop and evaluate Request For Proposal (RFP)
- SMS provides proposal responses to RSO
- PI edits, updates and approves PR

- RSO reviews and approves PR
- SMS proceeds with the award and contract execution
- SMS issues PO

- PI and/or Support administrator
  - Attaches CFI quote
  - Identifies CFI line item
  - Creates PR for bid RSO
  - Reviews PR
  - Approves PR for bid

https://policiesonline.ualberta.ca/PoliciesProcedures/Procedures/Competitive-Bid-Procedure.pdf