

The Procurement Services Process

Overview

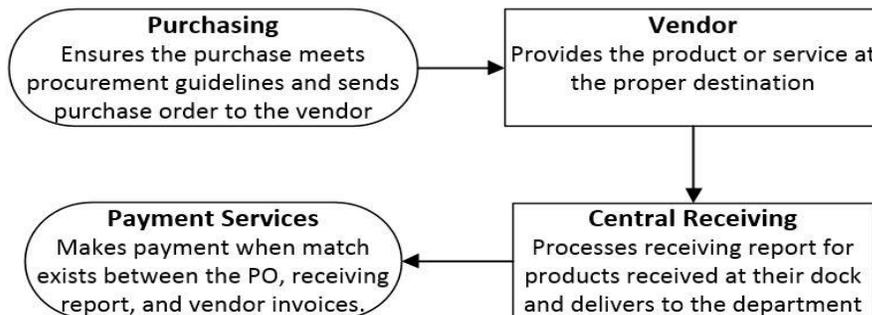
Each department is responsible for following the steps below to begin the Procurement Services process.

Submitting a Requisition

1. Gather pertinent information relating to the product or service needed.
 - For assistance during this process, please contact Procurement Services at 940-369-5500 or toll free at 1-868-855-4357 or visit the [UNT System Business Support Services webpage](#).
2. Complete an ePro requisition in EIS.
Note: It is imperative to use the correct category code when completing the ePro requisition. Using the wrong code can delay processing.
3. Complete the justification section of the ePro requisition for purchases over \$5,000 (reference any existing contract or purchasing co-op used, and include bid and quote information).
4. Attach purchase related documents, and bid documents for orders over \$5,000.
5. Submit for approval, and the requisition will route to the proper area for approval.

Requisition Approval Process

Upon receipt of the approved requisition by Procurement Services, the process will proceed as detailed below for most transactions.



Specifications (Scope of Work)

A specification is a detailed description of the product or service a purchaser seeks to buy, and consequently, is a description of what a bidder must offer to be considered for an award. Specifications are the primary means of communication between the UNT System and a vendor, and are important because they control the

- quality level of the product or service;
- amount of competition;
- suitability of the product or service for the job to be done; and
- the method of evaluation used in making an award and in determining the effectiveness of the purchase.

While departments are responsible for preparation of specifications, Procurement Services will assist in developing specifications, at the request of the department. A successful specification will contain the following characteristics:

- **Simplicity**
Avoid unnecessary detail, but be complete enough to ensure that requirements will satisfy their intended purpose.
- **Clarity**
Use terminology that is understandable to Procurement Services and to vendors. Correct spelling and appropriate sentence structure help eliminate confusion. Spell out technical words that are symbols (e.g. degree (°), Ohm (Ω), etc.).
- **Accuracy**
Use units of measure that are compatible with industry standards. All quantities and packing requirements should be clearly identified.
- **Equitability**
Identify two or three commercially available brands, makes, or models (whenever possible) that will satisfy the intended purpose. Avoid unnecessary "extras" that could reduce or eliminate competition and increase costs.
- **Reasonability**
Avoid unnecessary precision in stating measurements or standards since this can easily cause unnecessary expense. Unreasonable delivery requirements could also reduce or eliminate competition and increase cost.
- **Flexibility**
Avoid totally inflexible specifications that may prevent the acceptance of a bid that could offer greater performance for fewer dollars.

Specifications should provide a clear and accurate description of the technical requirements for the merchandise or service to be purchased. They must be clear and understandable to Procurement Services and the bidders. They must permit maximum competition between products of equal quality.

Descriptions may include a statement regarding the qualitative nature of the purchase and should identify minimum essential characteristics and standards to which the purchase must conform if it is to satisfy its intended use. "Performance" specifications may be written when minimum functional requirements can be identified. "Design" specifications may be written where minimum mandatory design performance and design specifications are appropriate. Avoid detailed product specifications when possible.

When it is impractical or uneconomical to make a clear and accurate description of technical requirements, a "brand name or equal" description may be used to define the level of quality and performance required. In addition, the specification should name the salient features and characteristics that all products must meet to be considered for an award. To give an example of the desired quality of the intended purchase, refer to a brand and model or a manufacturer's number followed by the words "or equal". When "brand name or equal" specifications are used, award may be made on a brand other than that specified provided it is the low bid, meets the specifications, and is functionally equal to the brand specified.

Sole Source/Proprietary Specifications

When department requirements for Procurement Services items or services limit the bidding to one manufacturer, one product, or one service provider, the department must provide a written justification. See [Proprietary Purchases](#) and [Sole Source Purchases](#).