

Procedure



Self-Service Procurement

This Procedure falls under the Procurement Administrative Policy.

Approved By:

Deputy City Manager
Financial and Corporate Services

Date of Approval:

04/16/2020

Program: Financial Management

The City of Edmonton's resilient financial position enables both current and long-term service delivery and growth.

Next Scheduled Review:

04/16/2023

Purpose:

The purpose of this procedure is to prescribe self service procurement processes available to business area purchasers for procurements worth \$25,000 or less, in lieu of utilizing a competitive procurement process.

Definitions

All definitions contained in the Procurement Administrative Directive apply to this procedure. In addition:

- “**contract manager**” has the same meaning as defined in the Contract Management Directive, A1205.

Processes

1. *Procurements of \$25,000 or less (Restricted Items)*
 - 1.1. The business area purchaser must determine the contract scope for the procurement.
 - 1.2. If the procurement is for Consulting Services (as defined in the Restricted and Controlled Items List), the business area purchaser must complete the Procurement and Contract Risk Assessment to determine if the procurement is high-risk or low-risk.
 - 1.3. All Restricted Items must follow any applicable processes prescribed in the Restricted and Controlled Items list, in addition to following this Procedure. In the event of any inconsistency between this procedure and the Restricted and Controlled Items List, this procedure will prevail.
 - 1.4. The business area purchaser will identify a proposed supplier, request a quotation and obtain any required contract documentation, such as insurance information, from the proposed supplier. City employees are encouraged to use the City's standard terms and

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conditions rather than a supplier's standard terms and conditions, wherever possible and appropriate.

- 1.5. The business area purchaser must complete a contract request in SAP Ariba, and must obtain all necessary approvals for the non-competitive procurement from the appropriate delegated authority for the procurement as per the Delegation of Authority Order.
- 1.6. If the Restricted and Controlled Items List indicates that legal review is required for the procurement, the business area purchaser will arrange with the Legal Services Branch for a legal review of all contract documents.
- 1.7. Once legal review is completed (if applicable), the CPSS Buyer must complete the procurement, the value of which must not exceed the amount approved by the expenditure officer.

2. *Procurements of \$25,000 or less (Non-Restricted Items and Controlled Items)*

For procurements of \$5,000 or less, the business area purchaser should use a City issued corporate credit card where possible.

If using a City issued corporate credit card is not feasible, or if the value of the procurement is between \$5,000 and \$25,000, the business area purchaser should obtain quotations and must process the procurement through a requisition in SAP Ariba.

- 2.1. The business area purchaser must determine the contract scope for the procurement.
- 2.2. All Controlled Items must, in addition to following this procedure, follow any applicable processes prescribed in the Restricted and Controlled Items List. In the event of any inconsistency between this procedure and the Restricted and Controlled Items List, this procedure will prevail.
- 2.3. The business area purchaser will identify a proposed supplier, request a quotation and obtain any required contract documentation, such as insurance information, from the proposed supplier. City employees are encouraged to use the City's standard terms and conditions rather than a supplier's standard terms and conditions, wherever possible and appropriate.
- 2.4. The business area purchaser must determine if the supplier has a vendor master record in SAP.
 - 2.4.1. If the supplier does not have a vendor master record in SAP, the business area purchaser must contact the CPSS Supplier Management Office to send an invitation to the supplier to begin transacting in SAP Ariba.

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- 2.5. The business area purchaser will create a purchase order once the requisition has been approved. Note: This task is automated in SAP Ariba.
- 2.6. The purchase order is sent through SAP Ariba to the supplier. The business area purchaser must provide the supplier with the following information when ordering:
 - contract scope;
 - delivery address;
 - invoicing instructions; and
 - contact information for the business area purchaser.

The Branch Manager, Corporate Procurement and Supply Services, will monitor the use of purchase orders and corporate credit cards and provide quarterly reports to the relevant Deputy City Manager of any procurements that do not comply with this procedure.

Additional Resources

The Branch Manager, Corporate Procurement and Supply Services may, after review by the City Solicitor, approve standards to support or provide further detail to the above processes; however, any amendments to the processes contained in this procedure must be approved by the City Manager.