



### ***Guide to the “Procurement Process Undertaken” - Agresso Requisition Field***

This Guide will support staff in identifying the correct option to be chosen for the first field on the Requisition screen i.e. “Procurement Process Undertaken”. There are 14 different options that will display from the drop down menu. The option chosen is required to have the comparable procurement documentation uploaded as part of the requisition.

Important points to be noted:-

1. ALL Requisitions >€5k (excl. VAT) are required to have documentation uploaded. The table below displays the correct list of documents needed for specific values and types of Requisitions.
  - There are templates for RFQ and Quotation Evaluation and Award Letters available on the PCO website.
2. ALL Requisitions >€25k will be routed (after Budget Holder approval) to Procurement & Contracts Office **for review of compliance with the Procurement Policy**
3. Requisitions will be rejected where no evidence of a proper procurement process has been uploaded.

<b><u>Option No.</u></b>	<b><u>Procurement Process Undertaken – New Field descriptions</u></b>	<b><u>Additional explanation by example</u></b>	<b><u>Documentation required for upload to Agresso for all Requisitions &gt;€5k</u></b>
1	NUI Galway Centralised Contract / Framework – Direct Purchase	For example. Placing a PO with Codex for a piece of stationery. No quotes required as this is on a centralised contract.	Screen grab of the pricing page on the Procurement & Contracts Office intranet. See link below:- <a href="http://www.nuigalway.ie/procurement-contracts/stepbystepguide/centralisedcontracts/">http://www.nuigalway.ie/procurement-contracts/stepbystepguide/centralisedcontracts/</a> OR The quote obtained from the contracted supplier.
2	NUIG Centralised Contract / Framework	For example. Placing a PO for Print Services	1) Scanned copy of the required mini competition

	– Mini Competition	(CON120).	quotation form issued to the panel of contracted suppliers AND 2) The completed and signed Evaluation Report of the quotes received.
3	1 quote sought (less than €5,000 excl. VAT) – no available Centralised Contract / Framework	For example. Requiring a repair service “on a once off basis”	1) A copy of the Request for Quotation (RFQ) AND 2) A copy of the supplier response received.
4	3 or more quotes sought (value between €5,000 and €24,999 excl. VAT) – no available Centralised Contract / Framework	For example. Requiring a laboratory diagnostic service “on a once off basis”	1) The Request for Quotation (RFQ) issued to the suppliers, AND 2) List of the named suppliers AND 3) The completed and signed Quotation Evaluation Report.
5 (a)	Sole Source <b>below €25k</b> (Supplies/Services <b>and or</b> Works) – pre-approved by Procurement & Contracts Office.	For example. Requirement for a bespoke design service for a research device. Sole Source reference number should be used in the Requisition Text Field or the Description of Goods field.	1) The “PRE_APPROVED” (signed by Procurement) Sole Source Form. AND 2) The RFQ issued to supplier AND 3) Response received from supplier  Link below for the template Sole Source Form and process details:- <a href="http://www.nuigalway.ie/procurement-contracts/stepbystepguide/solesourceprocess/">http://www.nuigalway.ie/procurement-contracts/stepbystepguide/solesourceprocess/</a>
5 (b)	Sole Source <b>above €25k</b> (Supplies/Services <b>and or</b> Works) – pre-approved by Procurement & Contracts Office.	For example. Requirement for a maintenance contract/warranty to equipment purchased by tender. Sole Source reference number should be used in the Requisition Text Field or the Description of Goods field.	1) The “PRE_APPROVED” (signed by Procurement) Sole Source Form, AND 2) Request for Quotation Form (RFQ) issued to supplier AND 3) Countersigned Award Letter Templates of both 2) + 3) documents above are issued to the Budget Holder along with approved Sole Source. A copy of the countersigned Award Letter is

			<p>required by PCO.</p> <p>Link below for the template Sole Source Form and process details:-  <a href="http://www.nuigalway.ie/procurement-contracts/stepbystepguide/solesourceprocess/">http://www.nuigalway.ie/procurement-contracts/stepbystepguide/solesourceprocess/</a></p>
6	Tendering Process (Supplies & Services) – or any procedure (for all values greater than €25,000 excl. VAT)	<p>For example. A requirement for any goods/services greater than €25k that are currently not under any contract. Always refer to the Procurement &amp; Contracts Office intranet under the Centralised Contracts Section to ensure a contract is not in place – this site is updated regularly. See link below:-  <a href="http://www.nuigalway.ie/procurement-contracts/stepbystepguide/centralisedcontracts/">http://www.nuigalway.ie/procurement-contracts/stepbystepguide/centralisedcontracts/</a></p>	<ol style="list-style-type: none"> <li>1) The completed signed Tender Initiation Form AND</li> <li>2) The signed Tender Evaluation Report AND</li> <li>3) The signed Tender Award Letter issued to the successful supplier.</li> </ol>
7	Other Processes that include (drawdown from HEAnet / OGP / Other Framework Agreements or Contracts) NOT covered under current NUI Galway available centralised contracts listed on the Procurement & Contracts Office intranet	<p>For example. HEAnet contract for Computer Servers.</p>	<ol style="list-style-type: none"> <li>1) SRFT Mini Competition documents with the original tendering reference number AND</li> <li>2) The signed Award Letter relating to this mini competition – issued to the supplier.</li> </ol>

8	Procurement Process Exempt for example (Public to Public in Ireland only). Other types include Conference / Seminars / Professional Memberships		<ol style="list-style-type: none"> <li>1) The “public to public” justification documentation. AND / OR</li> <li>2) Specifically relating to conferences – a copy of the brochure AND / OR</li> <li>3) Professional Memberships – a copy of the “renewal notice” received from the body involved.</li> </ol>
9	WORKS/B+E – Centralised Contract / Framework – Direct Purchase	<p><u>For use in relation to Buildings &amp; Estates types of purchases.</u> For example. Placing a PO with Flaherty Markets for electrical items. No quotes required as it’s a centralised contract.</p>	<ol style="list-style-type: none"> <li>1) Screen grab/highlighted section of the pricing page from the supplier pricelist. OR</li> <li>2) the quote that has been obtained from the contracted supplier.</li> </ol>
10	WORKS/B+E – Centralised Contract / Framework – Mini Competition	<p><u>For use in relation to Buildings &amp; Estates types of purchases.</u> For example. Placing a PO under the Civil Works Contract (NUIG/BUILD/002/2017)</p>	<ol style="list-style-type: none"> <li>1) The required mini competition quotation form issued to the panel of contracted suppliers AND</li> <li>2) The completed and signed Evaluation Report of the quotes received AND</li> <li>3) The signed Award Letter</li> </ol>
11	WORKS/B+E – 5 direct tenders (less than €50,000 excl. VAT) – no available Centralised Contract / Framework	<p><u>For use in relation to Buildings &amp; Estates types of purchases.</u> For example. Placing a PO for Required repair works “on a once off basis”.</p>	<ol style="list-style-type: none"> <li>1) The tender document issued AND</li> <li>2) The signed Tender Evaluation Report AND</li> <li>3) The signed Award Letter</li> </ol>
12	WORKS/B+E – 3 quotes sought (value between €50,000 and €250,000 exc. VAT) no available Centralised Contract / Framework	<p><u>For use in relation to Buildings &amp; Estates types of purchases.</u> For example. Placing a PO for Works required for a refurbishment project.</p>	<ol style="list-style-type: none"> <li>1) The Tender document issued AND</li> <li>2) The signed Tender Evaluation Report AND</li> <li>3) The signed Award Letter.</li> </ol>
13	WORKS/B+E – Tendering Process – any procedure (for all values greater than €250,000 excl. VAT)	<p><u>For use in relation to Buildings &amp; Estates types of purchases.</u> For example. A requirement for any works greater than €50k that are currently not under any contract.</p>	<ol style="list-style-type: none"> <li>1) The signed Tender Initiation Form, AND</li> <li>2) eTender Contract Notice AND</li> <li>3) the signed Tender Evaluation Report AND</li> <li>4) The signed Tender Award Letter</li> </ol>

<p>14</p>	<p>WORKS/B+E – Other Processes (e.g. drawdown from HEAnet/OGP / Other Frameworks) NOT covered under current NUI Galway available Centralised Contracts</p>	<p><u>For use in relation to Buildings &amp; Estates types of purchases.</u> For example. Placing a PO for Pest Control Services.</p>	<p>1) The SRFT Mini Competition documents with the original tendering reference number included AND 2) The signed Tender Evaluation Report AND 3) The signed Award Letter relating to this purchase.</p>
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