

Sul Ross State University
Business Process Analysis – Finance Module

Process Name: BPA for Bid/Quote Processing

Date: 10/6/05

Time: 8:00

Location: ACR 207

Participants: Patty Roach, JoAnn Wolf, Noe Hernandez

Session Lead: Patty Roach

Narrative/Description: Noe Hernandez

Receive and log requisition when this is received. When the requisition is over \$5,000.00 notes are recorded on the log (such as "out for bid). The requisition is then forwarded to senior buyer or person responsible for bidding. That person reviews the requisition and determines the way for requesting quotes (i.e. written bids vs. phone bids). If a written bid is needed, the bid documents are created and sent out to a list of vendors to include HUB vendors. Bids can be received by mail, fax, or e-mail depending on the procurement. When the bids are received, information is entered into a MS Access Database, a tabulation sheet is created and the purchase order is awarded. Most of the end-users are contacted by phone or e-mail when an award is made with the pricing and/or vendor information. Some of the requisitions require other approval (for example: bids over \$100,000.00, needs chancellor approval). Consultant, architects, & engineer purchases have a specific process that needs to be followed (i.e. publication in Texas Register).

Electronic Inputs: Requisition Log, Online Requisitions, ImageNow Scan.

Related Policy(s): University Policy Manual, TSUS Board of Regents Rules,

Web Features: None

Manual/Paper Outputs: Bid Documents, Purchase Orders, Requisition, Tab Sheets, Vendor Bids.

Customer(s): Departments, Vendors, Public, Carriers.

Regulatory Items: Texas State Statutes,

Frequency/Volume: 60

Potential Break Points: No Funds Available, No Signatures, Emergencies, Time Lines, No Requisitions in place, Cancellations, Vendor not set up. Bid requirements not clear, re-bids, no response from vendors, vendor protest, and lack of specifications (unclear).

Automation: Tabulation Sheets, Bid template in Word, some online requisitions.

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Issues: When we go into the entire process some issues such as order cancellation, no funds available in the system, no vendor set up in FRS. Specifications are unclear. No consistent way of contacting end-user during or after the bid process. No process to determine what bids go to what buyer. No process for closing some bids and filing at central location. Lack of communication of when bids are advertised (not knowing what is going on when bids are advertised). Determining clauses to put on bids.