

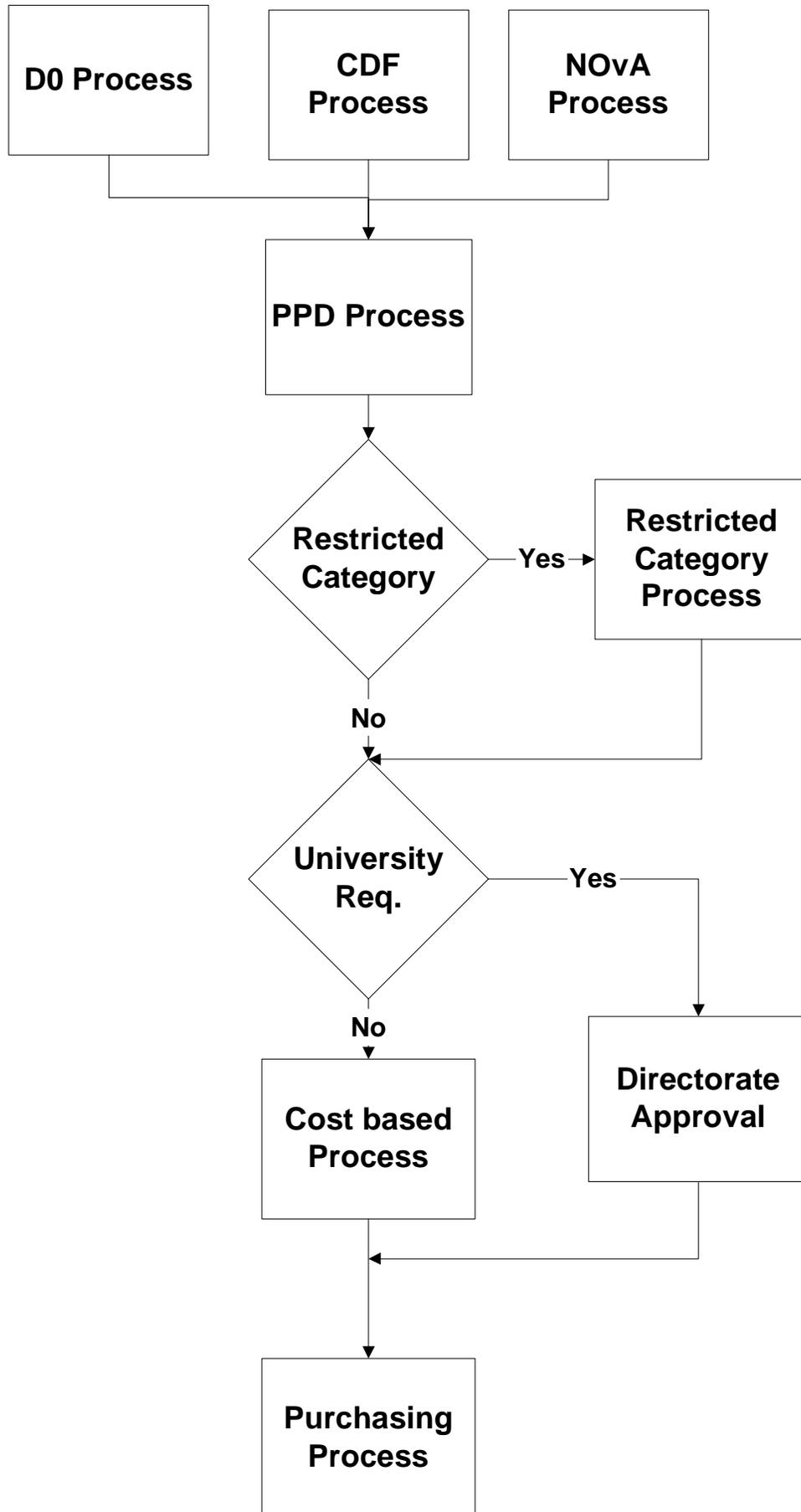
# **Fermilab's Requisition Process Flow**

By

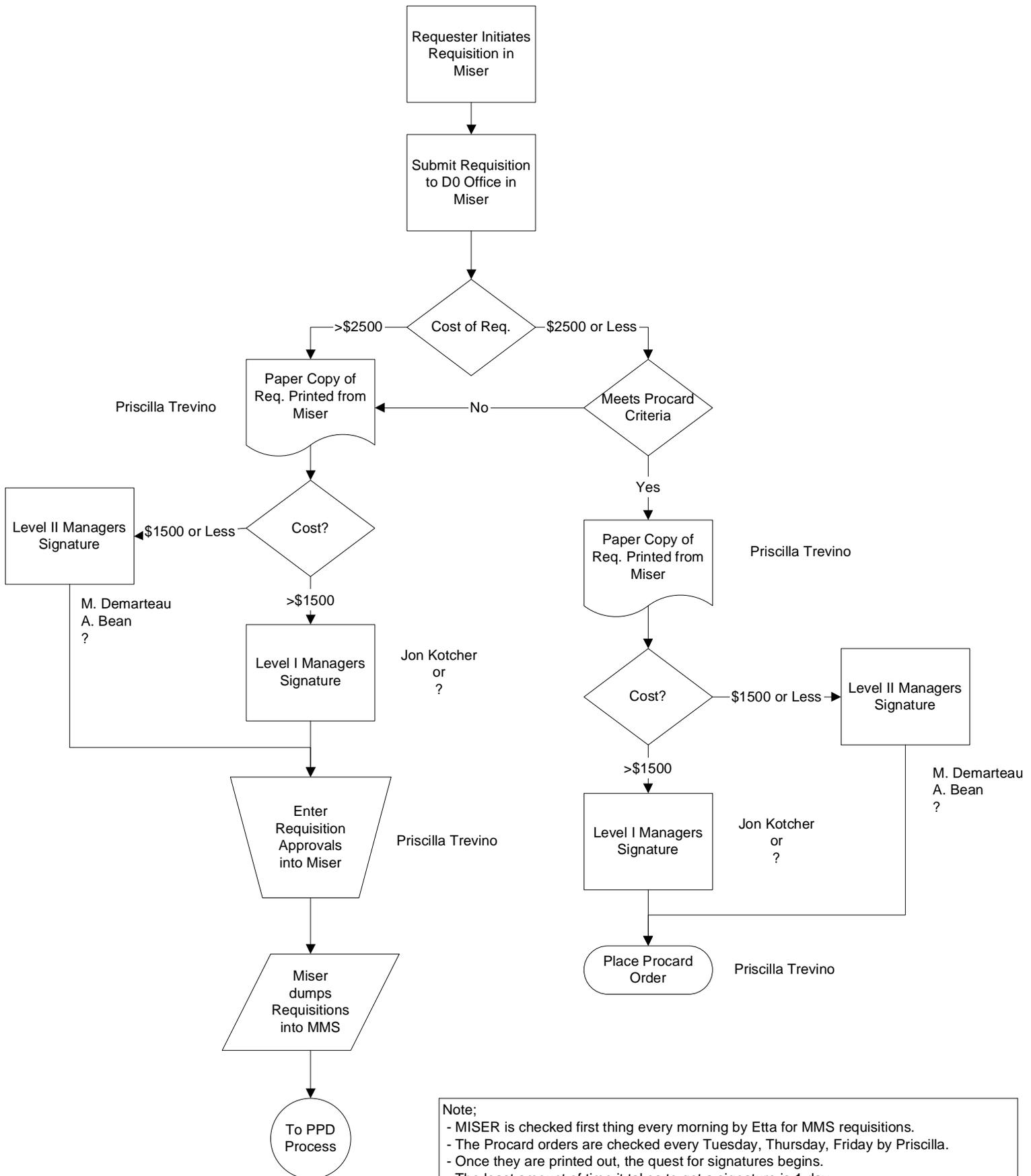
Dean Hoffer

DES-DECam Working Group Meeting  
06-Oct-06

# Overall Process



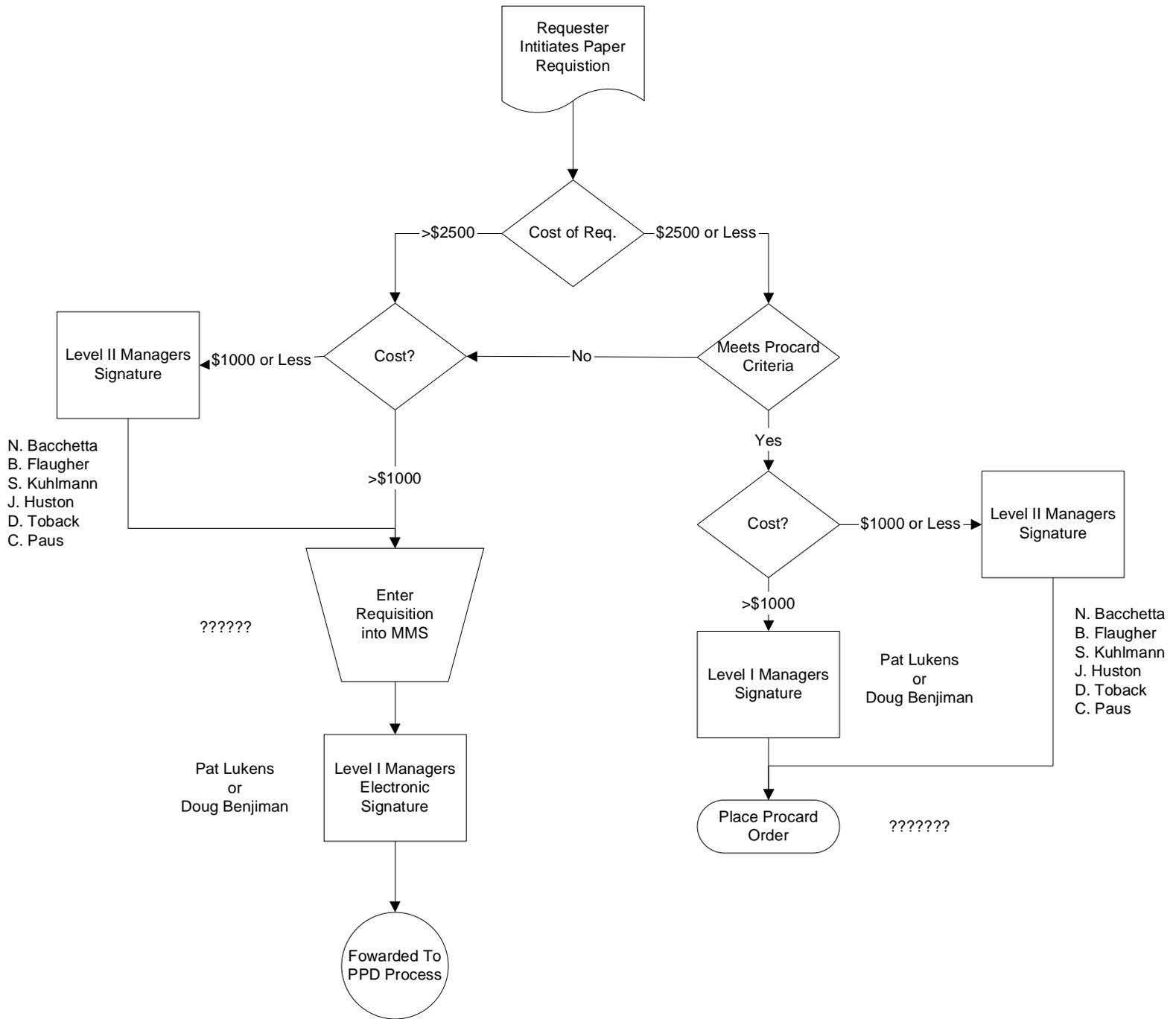
# DO Process



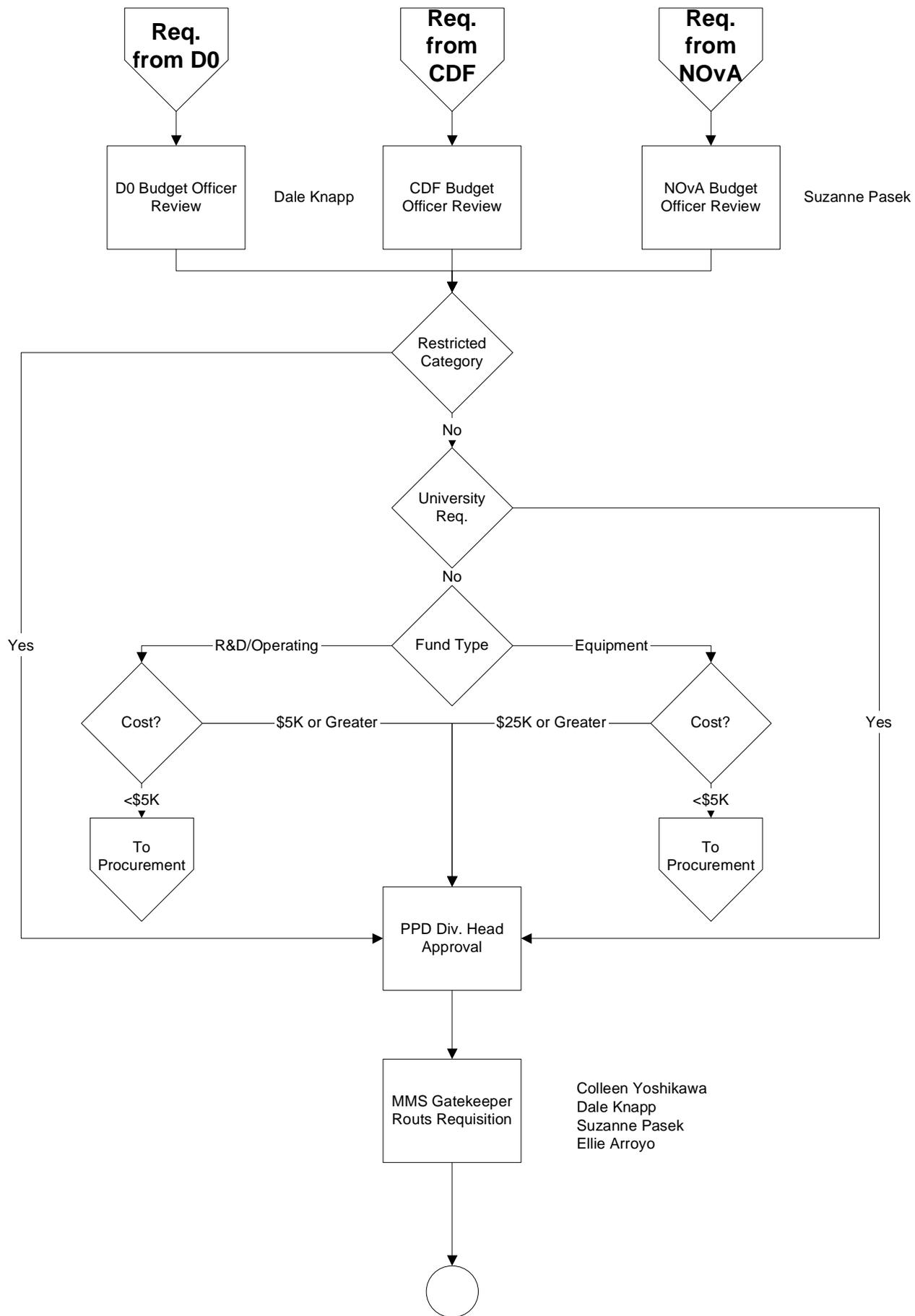
**Note;**

- MISER is checked first thing every morning by Etta for MMS requisitions.
- The Procard orders are checked every Tuesday, Thursday, Friday by Priscilla.
- Once they are printed out, the quest for signatures begins.
- The least amount of time it takes to get a signature is 1 day.
- The greatest amount of time can be 3-4 days.
- This number greatly depends upon the availability of the signature authorized personnel and whether or not there are any attachments required.

# CDF Process



# PPD Process



**REQUIRED SIGNATURE APPROVAL FOR REQUISITION PROCESSING**

*Approved by Pier Oddone 7/xx/05*

**NOTE: All criteria in items I, II, and III must be satisfied;  
for Line Item Construction Projects, see Section IV.**

**I. General Requirements**

Directorate

**NOTE: IN ADDITION TO THE REQUIREMENTS LISTED, ALL REQUISITIONS MUST FIRST BE APPROVED AT THE DIVISION OR SECTION LEVEL AND BE REVIEWED BY THE DIVISION/SECTION FOR NEPA APPLICABILITY.**

	Business Services		Assoc Dir: Administration	Assoc Dir: Ops Support	Assoc Dir: Research	Assoc Dir: Accelerators	Deputy Director	Director's Signature
All Requisitions \$25,000 and over	X							
All Requisitions \$50,000 -> \$100,000	X	(one required)->	X	X	X	X	X	X
All Requisitions \$100,000 -> \$250,000	X						X	
All Requisitions \$250,000 and over	X	(both required)					X	X

**II. Director, Deputy Director, and Associate Director Requirements**

**A. Functional Areas in excess of \$25,000**

Requisitions must have signature approval from all applicable categories  
These should also go to CD Head in parallel

Computing, communications, & networks ?	one	X	X	X	X		
Electronics (including controls and data acquisition)	requ.	X	X	X	X		

**B. Functional Areas in excess of \$50,000**

Requisitions must have signature approval from all applicable categories

Major Detector Projects (KTeV, CDF, DØ, CMS, ...)						X	
All requisitions for an experiment or experimental areas †				X			
All requisitions for beamline, LHC, NuMI, AIP					X		
All requisitions for GPP Projects			X				

**C. Required Directorate authorization regardless of amount**

University Requisitions	One Signature Required		X	X
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**D. Required Directorate authorization of Division/Section requisitions in excess of \$50,000**

Business Services Requisitions	X					
Directorate Requisitions (one required)	X				X	X
ES&H Requisitions		X				
Facilities Engineering Support Requisitions		X				
Laboratory Support Services	X					
Computing Division Requisitions			X			
Particle Physics Division Requisitions			X			
Accelerator Division Requisitions				X		

**IN ADDITION TO DIVISION/SECTION APPROVAL, THE CATEGORIES LISTED BELOW REQUIRE THE FOLLOWING SIGNATURE AUTHORIZATIONS**

**III Alphabetic Listing of Specific Categories**

	Business Services	ES&H	Facilities Engineering	Beams Division	Particle Physics Division	Laboratory Services	Technical Division		Assoc Director: Admin	Assoc Dir: Ops Support	Assoc Dir: Research	Assoc Dir: Accelerators	Deputy Director	Director's Signature
Accounts Receivable	X													
Building Mod. to Wilson Hall			X							X			●	●
Buildings (all types)			X							X			●	●
Building Mods./Footprint Area										X			●	●
Business Cards	X													
Clothing						X								
Consultants: Required: One Associate Director's signature and either the Deputy Director or Director's signature	X							(one required)->	X	X	X	X		
Fences								(one required)->		X				
Forklift Trucks	X													
Lasers (send copy of requisition)		X												
Metal Working Machinery							X							
Organization Memberships								(one required)->	X	X	X	X	X	X
Pesticides/Herbicides			X											
Precious Metals	X													
Radioactive Materials		X												
Requisitions for On-Call Help						X		(one required)->					X	X
Requisitions for Temporary (Agency) Help								(one required)->					X	X
Telecommunications	X													
Trailers/Portakamps										X				
Vehicle Rentals	X													
Vehicles	X													
Water Wells		X	X											

● Signature required for Project approval ; not required on individual requisitions

## DIVISION/SECTION APPROVALS

### Business Services Section

Accounts Receivable  
Business Cards  
Consultants  
Forklift Trucks  
Precious Metals  
Vehicles

Chief Accounting Officer: C. Conger  
Head, Business Services: D. Carlson  
Head, Business Services: D. Carlson

### Director's Office

Director

P. Oddone

Deputy Director

K. C. Stanfield

Associate Director for Administration  
Associate Director for Operations Support  
Associate Director for Research  
Associate Director for Accelerators

B. L. Chrisman  
J. Brown  
H. Montgomery  
S. Holmes

### ES&H

Lasers: send copy of requisition to ->  
Radioactive Materials  
Water Wells

W. Griffing, T. Miller  
W. Griffing, D. Cossairt  
W. Griffing

### Facilities Engineering Services

Building Mod. to Wilson Hall  
Pesticides/Herbicides  
Buildings (All Types)  
Water Wells

Head, Facilities Engineering: V. Kuchler  
Roads & Grounds Supervisor: M. Becker  
Head, Facilities Engineering: V. Kuchler  
Head, Facilities Engineering: V. Kuchler

### Laboratory Services

Clothing  
On-Call Help

Head, Laboratory Services: K. Van Vreede  
Head, Laboratory Services: K. Van Vreede

### Technical Division

Metal Working Machinery

Machine Shop Superintendent: C. Matthews

IV Signature Authority for Line Item Construction Projects is in accordance with Project Management Plans.

# **Signature Approval Document**

- **Document currently being revised**
- **Approver names are being updated**
- **All Requisitions  $\geq$  \$50K will need to go through Accounting Department**

# Summary

- **Determine Requisition Flow within DES-DECam**
- **Determine who the approvers are and \$ level they can approve**
- **Document your process and educate your project team on that process**
- **Build the time into the schedule for processing requisitions**