

This guide provides comprehensive operational **instructions for how ITS employees should submit** vendor quotes, purchase orders (POs), and purchasing-related **requests through the centralized Quotes tab within the Business Ops Requests application.**

This process replaces legacy email submissions to ensure optimal visibility and processing standards.

Access the Business Ops Requests App

Log in to the [Business Ops Requests application](#), then **select the Quotes tab** from the master navigation panel to begin the intake form.

[Submit New Quote Request](#)

1. Quote Submission Process Overview

All transactions and internal tasks related to purchasing coordination, payment workflows, and vendor engagement must move out of shared email inboxes and into the dedicated tracking system.

- **Request Tracking:** Every submission receives a unique tracking ID, eliminating lost requests or communication gaps.
- **Documentation Collection:** Auditable, upfront attachment handling ensures full compliance with institutional rules.
- **Processing Efficiency:** Standardized routing directly accelerates operational turnaround and routing cycles.
- **Status Visibility:** Real-time transparency gives requesters immediate insight into approval and fulfillment stages.

2. Routing Guidelines & Request Scope

✓ What to Submit via Quotes Tab

- Finalized vendor quotes fully prepared for immediate routing and procurement processing.
- Standard department purchases requiring formal Purchase Order (PO) generation.
- Procurements requiring tracking, specialized payment matching, or financial processing.
- Project-specific purchasing requests or commercial vendor service agreements.
- Transactions with locked-in commercial terms, precise scope definitions, validated final pricing.

✗ What NOT to Submit

- Standard work computer procurement (e.g., corporate laptops, desktops, standard external monitors).
- Individual software allocations, standard seat licensing, or employee-specific software keys.

Note: Computer hardware and individual software assignments must continue utilizing the established, standalone IT hardware/software request procedures.

3. Completing the Request Form Fields

The form enforces specific required data parameters to ensure seamless automated routing. **Please review the breakdown of required fields below:**

* Funding Source

The financial or operational source initiating the quote request. Requesters **select either UHealth or Academy** via the contextual dropdown menu.

* Vendor Name

The **precise legal or corporate name** of the commercial vendor providing the specified item or service.

* Vendor Contact

The **primary external account manager or representative** responsible for managing the transaction.

* Vendor Contact Email

The direct professional **email address of the vendor** point of contact. *This ensures clear communication for processing queries.*

* Vendor Contact Phone

The **phone number for the assigned vendor** contact. *Must be entered with appropriate extension routing details, if applicable.*

* Description of Item Requested

A comprehensive, descriptive business **justification detailing explicitly why the item/service is requested** and exactly what it will be used for. *General/truncated notes can result in routing rejections.*

* Item Due Date

The **definitive deadline date** by which the request must be fully processed, delivered, and fulfilled. *Use the integrated calendar picker to input.*

* Is this budgeted?

Requesters must explicitly indicate Yes or No to confirm if the transaction fits preallocated budgetary bounds.

* Quoted Amount

The **exact gross dollar amount reflected on the vendor's documentation**. *Ensure this perfectly matches your primary pricing attachment.*

* Delivery Location

The explicit corporate address, building code, floor, or room identifier **where physical items must be sent** or service rendered.

* **Delivery Point of Contact**

The **individual designated to physically receive, inspect, and sign** for items or verify the finalized vendor deployment.

* **IT Chief for this Request**

Select the **specific executive IT Chief sponsoring and providing underlying administrative oversight** for this transaction. *If your specific operational sponsor is omitted, **select "Other"** to unlock the "Please specify requester" contextual free-text field.*

* **Attachments (Quotes, Agreements, etc.)**

Requesters must **upload all necessary files**, covering comprehensive vendor line-item quotes, formal master agreements, statements of work, or relevant purchasing records.

4. Critical Processing Rules

- **Data Integrity:** Ensure all fields are fully populated and attachments are fully verified prior to pressing the Submit button. Missing elements or files will delay your request execution.
- **Quote Readiness:** Quotes must be completely finalized and non-speculative at the exact point of system submission.
- **Post-Submission Modifications:** Users are permitted to directly modify or update data entries in the system only while the operational workflow state explicitly displays **"Not Started"**. Once the internal status shifts out of this state, the entry locks down completely. Any subsequent adjustments require submitting a brand-new form entry.

5. Escalation Protocols & Support Matrix

If an operational request requires high-priority processing or immediate escalation due to an imminent project deadline, you must adhere strictly to the following corporate workflow:

1. File the request completely inside the Quotes tab environment first to instantly generate an automated system tracking number.
2. Reach out to your assigned operational contact below via professional email, explicitly quoting your generated submission tracking ID within the subject line to request an expedited review.

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