**Purchase to Pay Process**

StFX’s financial software upgrade delivers process improvements and supports a workflow approval which will reduce paperwork and duplication of effort for financial transactions.

To support this functionality, Procurement Services has developed a fillable purchase requisition form in Excel format. This form will be submitted by email to Procurement Services with any additional information you have available related to the purchase request.

*Please note that a requisition identifies a “need”. A purchase order is the legal document which fulfills that need. As such, this requisition form is NOT to be sent to any vendor for any reason.*

Purchase requests do not require approval when they are submitted – once the requisition has been completed by Procurement, workflow will manage the approval process for purchase requisitions as follows:



**Instructions for completing the online Purchase Requisition form**

The purchase requisition is the internal document created which starts the procurement process. A requisition is necessary for all purchased products/services **except** purchases through the Procurement Card program and exceptions as outlined in the Procurement Policy.

The form is an Excel document and will be completed and emailed to Procurement Services along with any additional information/attachments/quotes you can provide to assist in sourcing the product or service requirement.

The numbers below correspond to the fields shown in the example (page 3):

1. **Request Date**: Enter the date MM/DD/YYYY requisition is created.
2. **Department or Project Account Code**: The account number to be charged.
3. **Date Required**: Enter the date (MM/DD/YYYY) that the goods or services are to be delivered to the end user. Please remember to allow for standard processing time within the Purchasing Department and for order filling and shipping time from the vendor. If there is a critical date items are required, please note this clearly on the form in the item description field.
4. **Department Name**: Enter Department Name (i.e. Biology)
5. **Requested by Name**: Enter the name of the person to receive the goods/services in the purchase request.
6. **Deliver to**: Enter the name of the person who should receive the goods/services.
7. **Delivery to Building & Room #**: Enter the building and room where delivery is required (i.e. MacKinnon 521)
8. **Email for Requestor**: Enter the email address of the requestor.
9. **Phone Number**: Enter the phone number of the requestor.
10. **Suggested Suppliers**: You can suggest up to three suppliers that may be able to fulfill the order – this is optional.
11. **Catalogue Number**: If known, please provide the product number for the goods/services requested.
12. **Quantity**: Indicate quantity required of each good/service
13. **Unit of Measure** – how is the item or service measured in a package? Is the price set for “each”, “box” “carton” “hour”, etc.
14. **Description**: Provide as many details about the product or service being requested. If possible, include a manufacturer name and model number. If you are attaching a quote, product brochure, catalog page, or anything else that describes the item is available, please note “see attached” in this field, scan a copy of the reference information to attach to the email requisition submission. If competitive prices were obtained, include all information. Do not combine commodities that are to be purchased from different vendors on one requisition.
15. **Unit Price** – price per item (if known – leave blank if unknown)
16. **Shipping (Est):** Approximate amount of shipping costs (if known – leave blank if unknown)
17. **Additional Instructions/Specifications/Reference No.**: If you wish to provide additional information, please enter here.

The **Extension** and **Total** fields will calculate automatically if pricing is provided. Additional charges for shipping, etc. may be added to your order if known.

There is space for 10 items – if more than 10 items are required, please complete a second form and attach to your email submission. Separate purchase requisitions should be prepared for each different vendor. Similar items from the same source can and should be grouped together on the same requisition.

Once the form is completed, please email it along with any attachments to [procurement@stfx.ca](mailto:procurement@stfx.ca). We will verify that the form is complete and that the information regarding the requested purchase is current and accurate, make adjustments and fill in any blanks as necessary. Note that if we identify any significant increase in total cost due to things like outdated vendor quotes, omitted shipping charges, mathematical errors in calculating the extension costs or totals, we will submit a request through Workflow approval for authorization to proceed from the requestor before additional approvals are requested.

**Example**:

