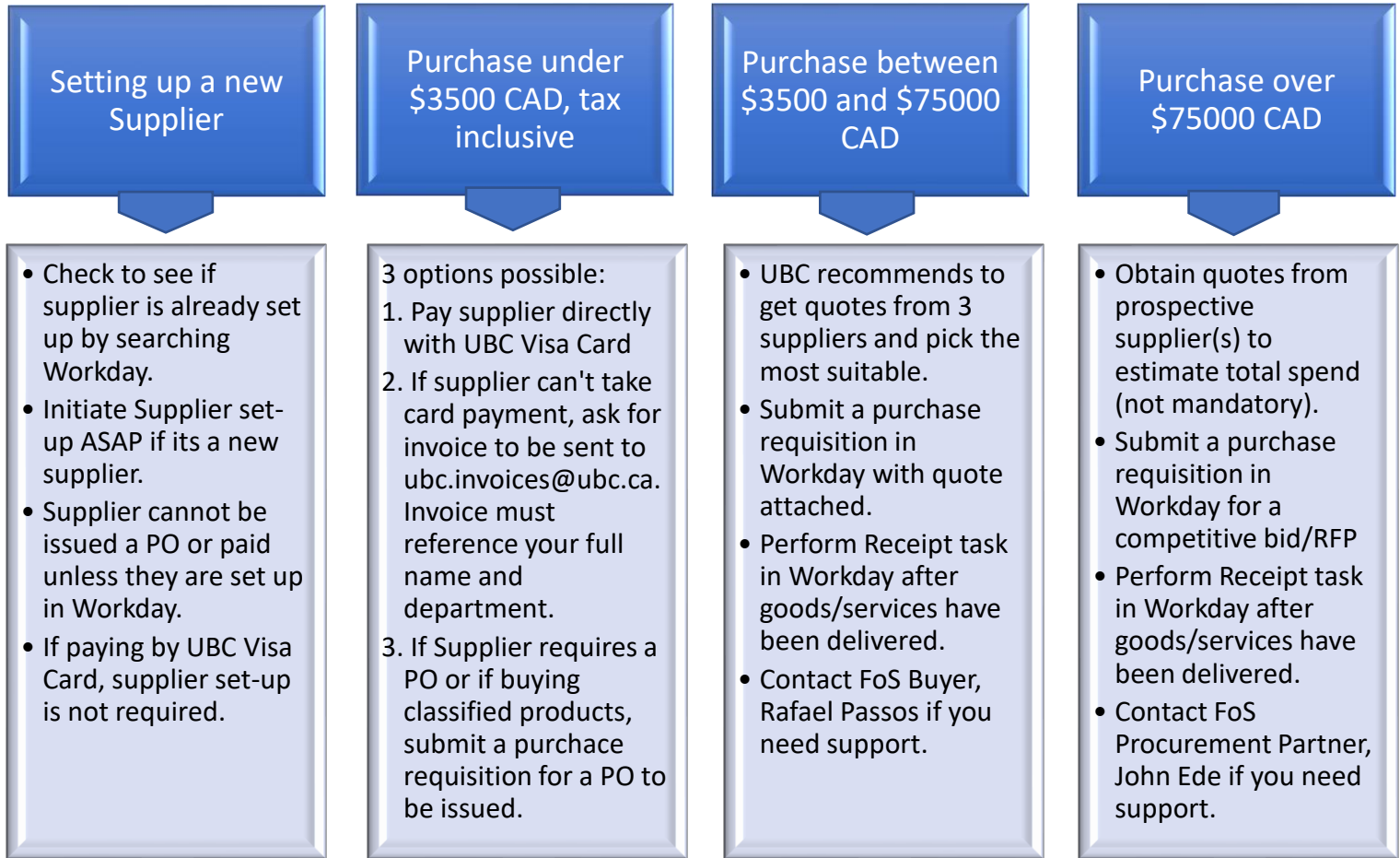




## INTRODUCTION TO PROCUREMENT AT UBC: INFORMATION FOR FACULTY AND STAFF

*For complete and up-to date information on how to buy and pay for goods/services at UBC, please visit the procure-to-pay page on the UBC Financial Operations website or by following this link: <https://finance.ubc.ca/procure-pay>*

### Quick guide on how to buy and pay for goods and services



**Dedicated Procurement Resource:** [Rafael Passos](#) (Buyer) and [John Ede](#) (Procurement Partner) are FinOps staff dedicated to the Faculty of Science as part of the new Service Delivery Model. They are co-located in the Dean's office and are available by email, phone or in-person.

For all purchases, please submit a purchase requisition in Workday ([find Job Aid here](#)), but if you have any specific questions about the process, you can contact:

- \* Rafael for purchases between \$3,500 (after tax) and \$75,000 CAD (before tax)
- \* John for purchases Over \$75,000 CAD.

**New Supplier Setup:** A supplier must first be setup in Workday before users can issue purchase orders to, or pay invoices from that supplier.



- \* Please Check if your chosen supplier is already set up in Workday as a first step; refer to the [View/Find Suppliers](#) job aid in the Workday knowledge base to check for existing suppliers.
- \* To set up a new supplier please follow the steps in the [Create Supplier Setup](#) job aid in the Workday knowledge base. UBC FinOps maintains a [list of approved Suppliers](#) and you are encouraged to check here before selecting a new supplier.

**Submitting a Purchase Requisition:** Except for purchases that are made by using the UBC Visa Card, all purchases in UBC begin within Workday with the submission of a purchase requisition. All UBC staff have access to, and may submit a requisition for any good or service they need. For step by step guide on how to submit a purchase requisition please review the [Submit Purchase Requisition - Non-catalogue](#) job aid in the Workday Knowledge Base.

**Workday Catalogues:** Catalogues are an innovative feature within Workday that allows UBC requestors to buy goods from select Suppliers for any amount without going through the normal purchasing process. Catalogues allow UBC requestors to skip the buyer approval stage of the process because catalogues reflect UBC negotiated contract pricing. Please review the [Submit Purchase Requisition - Catalogue](#) job aid in the Workday Knowledge Base to learn more about buying from a catalogue.

**Receiving in Workday:** For purchases with a Purchase Order, it is the requestors' responsibility to perform a Receiving task in Workday once the goods or services on the requisition/PO are delivered or completed. Requestors do NOT need to wait for supplier invoices to be submitted to UBC before they perform the receiving task in Workday. Supplier invoices cannot be paid until receiving is done. For step by step guide to Receiving in Workday, please refer to the [Create Receipt of Goods & Services](#) job aid in the Workday Knowledge Base.

**Paying for goods and services:** Except for purchases that are made with the UBC Visa Card, suppliers should submit an invoice to UBC for payment. Suppliers are directed to send invoices to UBC Accounts Payables directly by emailing the invoice as an attachment to [ubc.invoices@ubc.ca](mailto:ubc.invoices@ubc.ca). The invoice must reference your full name and department for non-PO invoices.

**UBC VISA Card reconciliation and Expense Reimbursements:** UBC Finance handles the payment of UBC Visa card balances. Transactions posted to the card must be reconciled by the cardholder or their delegate using Workday Expense Reports. A transaction is not reconciled until all review and approval steps are complete.

For step-by-step guide on reconciling you UBC VISA card or to submit a reimbursement claim please review the [Reconcile UBC VISA Transactions on an Expense Report](#) job aid in the Workday knowledge base.

**Contracts and Signing Authority:** Purchase Orders (PO), sales agreements, NDA's, agreements with indemnity clauses are examples of legally binding documents. Only authorized UBC Signing Authorities may issue POs or sign off on contractual agreements related to procurement on behalf of UBC. Please contact your Buyer (Rafael) or Procurement Partner (John) before signing any supplier contracts.