UBC MINING ENGINEERING

Purchase Requisition

Interim process

Complete **Sections 1-4** and obtain approval from the appropriate PI / Supervisor before submitting. Attach a supplier quote or product link. Do not place an order or commit funds; the Purchasing Coordinator places orders through approved UBC channels.

1. Requester Information (required)

Requester name: Click or tap here to enter text.

UBC email: Click or tap here to enter text.

Date submitted: Click or tap to enter a date.

2. Items Requested (required)

Use one request per supplier and funding source. Include enough detail to identify the exact item (model / part number, specifications, or product link). Attach quotations where available.

Instructions for Completing the Item Spreadsheet:

- **Double-click the spreadsheet to enter editing mode.**
- Enter the item description, product link, quantity, and estimated unit price.
- The estimated line totals and grand total will calculate automatically.
- Leave unused item rows blank. Do not modify formulas, headings, or table formatting.
- Click outside the spreadsheet to finish editing, then save the Word document before submission.

Item / specification / part number	Product link	Qty.	Est. unit price	Est. line total
			Total:	**$0.00**

3. Funding Information (required)

Supervisor's name: Click or tap here to enter text.

Funding worktag: Click or tap here to enter text.

4. Delivery and Special Requirements (optional)

Preferred delivery location / room: Click or tap here to enter text.

Check all that apply:

☐ Heavy / oversized ☐ Hazardous chemical / controlled material ☐ Compressed gas

☐ Refrigerated / temperature-controlled ☐ Specialized installation / storage

☐ Other: Click or tap here to enter text.

Special handling, safety, installation, or delivery instructions: Click or tap here to enter text.

5. Purchasing Coordinator Use Only

Request ID: System Assigned

Date received: Click or tap to enter a date.

Received by: Jas Si

Status: Choose an item.

Workday PO reference: Click or tap here to enter text.

Supplier order reference: Click or tap here to enter text.

Order date: Click or tap to enter a date.

Delivery data: Click or tap to enter a date.

Received / verified by: Click or tap here to enter text.

Requester notified date: Click or tap to enter a date.

Notes / discrepancies / outstanding quantities: Click or tap here to enter text.

Submission and records

1. **Submission:** Requesters must complete Sections 1–5, obtain written approval from the appropriate PI/budget owner, and submit the form with supporting documentation to the Purchasing Coordinator.

2. **Verification:** The Purchasing Coordinator must verify that all required information and approvals are provided. Incomplete requests must be returned to the requester for correction.

3. **Registration:** The Purchasing Coordinator must register accepted requisitions in the centralized tracking system.

4. **Ordering and Receiving:** The Purchasing Coordinator must maintain accurate order statuses, purchasing references, delivery information, and receiving records. Any discrepancies or outstanding items must be documented.

5. **Recordkeeping:** Requisition forms, approvals, quotations, order confirmations, and receiving documentation must be retained in the designated departmental records location in accordance with UBC recordkeeping requirements.