

Student Purchasing with Memorial University

Purchasing Workflow

1. Find pricing for the item or product that you need for your project.
2. Create a quote for the item or product.
 - The quote can be a screenshot or print out of the online shopping cart as long as the itemized cost is included.
 - Ensure that the quote includes shipping costs (if relevant). This may need to be generated as a second page.
3. Complete the Purchase Requisition Form (see last page).
 - Ensure that the Vendor is clearly identified. If someone helped you generate the quote include their contact information.
 - Add each item to the list, including quantities and detailed descriptions. You should be able to find the part you need on the website (or at the vendor) using the information you include.
 - You MUST include the FOAPAL (i.e. your internal account number).
 - You will not have a FOAPAL assigned until your group is awarded a grant or funding from within the Faculty of Engineering. If you do not know your FOAPAL number the EIR can help you find it.
 - The account signing authority MUST sign the form before it will be processed.
 - This might be your team's faculty advisor, or the Engineer in Residence. It will be the Faculty representative highlighted on your LIFE Award application.
4. Combine the signed purchase request form and the quote into a single PDF
5. Forward the signed file (including the quote) to the Engineer in Residence
 - Kyle Doody (kdoody@mun.ca)
6. Your fund administrator (Engineering Finance) will approve and sign off on the purchase when they verify that the purchase is eligible. The paperwork will then be sent to purchasing to be processed. You will receive an email verifying the purchase has been made.
7. When the order arrives you will be notified by email. You can collect the parts from EN1015 (receiving in the SJ Carew Building).

NOTE 1: Your purchase will be rejected if the purchase is ineligible. This means that you cannot buy things using your internal funding unless it was included in the funding proposal.

NOTE 2: A new purchase request form is needed for each purchase at each vendor (no matter how large or small the purchase it). To save time, try to include all the parts you can on a single form.

Overview of Purchasing at MUN

If you're reading this tutorial you are likely a lead of a student group that has received funding for your project. When funds are provided through the University (either as special project grants, or charitable denotations), the funds are subject to the same controls imposed by the University on all purchasing. As a result there is some basic background you need to understand before you can start making use of the funds you have available.

Important Links

Purchase Requisition Form & Quotation Summary Log Form:

<https://www.mun.ca/engineering/for-faculty-and-staff/forms/purchasing/>

Technical Services Work Requisition Form:

<https://www.mun.ca/research/resources/ts/>

Your Funds are Categorized

When you receive funding through Memorial as a grant, often the funding provided is received through some sort of application process. In this application process you provide a budget with an approximation of how much your project will cost.

These categories you assign are important! When you define specific ways you plan to spend your funding, grant administrators at Memorial need to confirm that your funds are being spent the way they were intended. For example, let's say you're planning to attend a competition where you build a robot. On your budget you state that you only need funding to support travel and hotel stays. When you're getting to go to your competition you realize you need to buy an air compressor for your robot's pneumatic system. You wouldn't be able to purchase that air compressor using the funding provided through Memorial because you didn't specify you needed "Materials or Equipment" in addition to travel and hotels.

Long story short, every purchase you plan to make using your Memorial funding needs to be in line with your funding proposal. If it isn't the purchase request will be rejected. This isn't always the end of the world (let's say you happen to have some external sponsors, so you have money in your team bank account). It's just something to keep in mind about using Memorial managed funding.

RULE OF THUMB: Keep the budget lines on the application as high level as possible. "Travel" can capture flights, car rentals, hotels, etc. You should have an idea of what these things will cost on your detailed budget, but in the application you can keep things high level.

There are purchasing controls you need to follow

Just like every purchase made through Memorial, your funding is subject to the same purchasing restrictions. The full details of purchasing at Memorial are included here:

<https://www.mun.ca/policy/browse/policies/view.php?policy=438>

There are a few key things to remember:

- All purchases require a quote to be processed
 - All purchases under \$2500.00 require one quote

- All purchases between \$2500.00 - \$10,000.00 require three quotes
 - Preference must be given to local/provincial suppliers as long as they are within 10% of the best value for the goods.
- All purchases over \$10,000.00 require a formal tender

Something to keep in mind is that “internal services” or “standing offer” to the university only one quote is required under the 10K limit. For example, if you needed to buy a bunch of desktop computers MUN has a standing offer with Dell. As a result, anything can be purchased from Dell under the standing offer without additional quotes.

Reimbursement for purchases you made on a personal credit card is possible

You can be reimbursed for purchases made on a personal credit card / debit card. The same rules apply as any purchase per **the notes above**. The purchase must be for the intended purpose of the funding. If the purchase is eligible, then a purchase reimbursement can be requested as long as a receipt can be provided.

To process a reimbursement from the fund (for example, let's say it for travel expenses). Connect with your fund administrator. You'll still need to fill out the purchasing paperwork you would complete for any order, this can then be submitted with the receipt for reimbursement. Keep in mind that reimbursement this way is not a quick process and you could be waiting about four to six weeks before you receive your reimbursement.

RULE OF THUMB: Use the funding you have available in your team external bank account for purchases where possible. Then use the Requisition Process to be reimbursed for those purchases and deposit the value back to your external account. This will help you purchase things quickly without students buying things on personal cards and waiting for reimbursement.

Coordinating Work Orders through Technical Services

Technical Services is a huge asset here at Memorial. While the Student Design Hub encourages student to make as much their projects by hand as they can, it's understandable that certain skillsets are beyond what a student can reasonably do (for example welding).

Technical Services can provide project support for students at an inside cost of \$25.00 / hour. Sometimes they will even donate their time to projects (if they have the time, interest, and capacity to do so).

To get an idea what needs to be done, connect with Technical Services in the Engineering building about your project. Once you have an idea what your project will cost you can complete a “Work Request Form” (see link above), and include the email with the quote from Technical Services. This form needs to be completed with a summary of the project, and must be signed off by your Faculty Representative.

NOTE: Technical Services will complete scopes for cash if you're in a pinch while honoring internal funding rates. However, best practice is to provide the FOAPAL account code so they can bill your grant directly.

It is possible to move external funding into a Memorial Account, but there are some nuances to understand.

Moving money into a Memorial account from your team's bank account is possible, but a bit of a process. You basically need to “donate” the money to your team through Memorial. You can do this by going to the cashier's office, and asking them if you can donate “x amount of money” to “insert my team here”.

You also need to provide them with the internal account number (i.e. the FOAPAL). This money will then be transferred to your internal account.

Some things to note:

- You need to have an account in place before you can do this. Memorial won't just make you an account and hold your funding. Speak with the funding administrator for more details.
- After the funding is added to the account, it is subject to the same rules as the other funds in that account. This means that removing it from this account is a lot more difficult if required (as only eligible purchases can be put through your funding).
- Finally, Memorial will not issue any documentation to people or businesses that have donated to your group directly (i.e. not through Memorial). You need to manage these funds yourself and must make sure they're clear to bring into the University account before you do so. Again, before trying this please speak to your grant administrator.
 - Memorial **will not** issue tax receipts for support you receive from sponsors. If you offer to provide a receipt for the sponsorship / donation then it is your team's responsibility to provide that documentation. It is okay to provide an invoice acknowledging receipt of a sponsorship, but you must be a registered charity (that pays income taxes) to offer tax receipts.

Filling out a Purchase Request Form

You can find a link to the purchase request from above. This is the generic form that researchers and students use to make purchases with their funding. It looks like this:

ENGINEERING REQUISITION FORM							
VENDOR NAME _____		VENDOR ADDRESS _____		ORDER NUMBER _____ TO BE COMPLETED BY PURCHASING OFFICE			
VENDOR TELEPHONE _____		VENDOR CONTACT _____					
VENDOR EMAIL _____		IMPORTANT, PLEASE STIPULATE FOAPAL:					
DATE _____		REQUISITIONED BY _____		EMAIL _____		TEL. NO. _____	
DATE REQ'D. _____							
ITEM	QUANTITY	PART NO.	DESCRIPTION			UNIT PRICE	TOTAL
Grant / Course Number _____		Quotes Attached (Shipping Included) <input type="checkbox"/> \$0 - \$2,500 - 1 Written Quote <input type="checkbox"/> \$2,500 - \$10,000 - 3 Written Quotes <input type="checkbox"/> Over \$10,000 Tender Required <input type="checkbox"/> Tender not Required See Attached				S & H	
Grant / Course Approval _____						GST	
Departmental Approval _____						HST	
Date Approved _____						TOTAL	

Each field on this form is important, and there are also a few things that need to be included that aren't explicit. Here's a checklist of all of the information you'll need to include on your form:

- 1) Vender Details
 - a. Vendor Name, Address, and Contact Information
- 2) Who is completing the request
 - a. Date, Who, Contact Info
- 3) All items needed from the vendor
 - a. All quantities, part numbers, descriptions and unit costs must be filled out. This is so purchasing knows "EXACTLY" what you need to order. Only you understand the specifics of the items you need, so you need to be very explicit so it's simple for them to find it when it comes time for the purchase to be made.
- 4) Purchase Justification
 - a. Every purchase made needs to include a brief justification as to "why" it's needed. This is a requirement so the funds can be audited if required.

5) Funding Category

- a. This is only relevant if you have multiple “categories” of funding. For example, if you had funding where you had 5K specifically for materials, and 5K specifically for travel (let’s assume in this case an external donor provided money to the team through the University and were explicit about how they want their money to be used). Then you would need to specify which “bucket” of money you’re spending from. This most likely **WILL NOT** be relevant to you.

6) Fund Number

- a. You can get your fund number from your fund administrator. This is basically a unique identifier for your account (so they know where the money is coming from, and they can confirm your team has enough for the purchase, and it’s an appropriate purchase).

7) Approval

- a. Every purchase needs approval, and the approval is different based on how the funding is awarded. In most cases, the funding can be spent by any student whose name was on the funding application. However, you need to check with your fund administrator to be certain (as it may just be your team lead, or your faculty advisor, who can sign off on purchasing).

8) Attachments

- a. Every purchase needs attachments. You should include a quote from a vendor showing all of the line items you are ordering, along with any shipping costs.
- b. This can be a screenshot of your shopping cart on an online webpage, just be sure to get a shipping estimate, and note the currency from the webpage.

When you’re done, the request should look like this:

ENGINEERING REQUISITION FORM

VENDOR NAME Fastenal Canada
VENDOR ADDRESS 41B Sagona Ave.
MOUNT PEARL, NL A1N 4P9
VENDOR TELEPHONE Phone: (709)747-5969
VENDOR CONTACT _____
VENDOR EMAIL NFMOU@stores.fastenal.com

ORDER NUMBER _____
TO BE COMPLETED BY PURCHASING OFFICE

IMPORTANT, PLEASE STIPULATE FOAPAL:
This is where your University Account Number Goes (FOAPAL)

DATE	REQUISITIONED BY	EMAIL	TEL. NO.	DATE REQ'D.
9/12/21	Kyle Doody	kdoody@mun.ca	7098642732	

ITEM	QUANTITY	PART NO.	DESCRIPTION	UNIT PRICE	TOTAL
1	25	MS2550020A200	M6 X 20 Socket Head Cap Screw A-2	0.14	3.62
2	25	MS2550030A200	M6 X 30 Socket Head Cap Screw A-2	0.17	4.20
3	25	MS2550040A200	M6 X 40 Socket Head Cap Screw A-2	0.22	5.40
4	10	MS2550050A200	M6 X 50 Socket Head Cap Screw A-2	0.24	2.44
5	50	1139543	M5-0.8x8 12.9 Socket Head Cap Screw	0.06	3.01
Justification: Hardware required to assemble project.					
Category: Materials					
				Subtotal	18.67

Grant / Course Number	YOUR TEAM NAME HERE	Quotes Attached (Shipping Included)	S & H
Grant / Course Approval	Signature of Signing Authority Here	<input checked="" type="checkbox"/> \$0 - \$2,500 - 1 Written Quote	GST
Departmental Approval	_____	<input type="checkbox"/> \$2,500 - \$10,000 - 3 Written Quotes	HST
Date Approved	_____	<input type="checkbox"/> Over \$10,000 Tender Required	3.18
		<input type="checkbox"/> Tender not Required See Attached	TOTAL
			24.35

Attached to this form, you should also include a quote:

MEMORIAL UNIVERSITY OF NEWFOUNDL
FACULTY OF ENGINEERING
SAINT JOHN'S, NL A1C 5S7
CAN

Phone: 709-737-2566
Fax: 709-737-3514

ATTN: Caroline Koenig

Account #: CN480079
Quote #: 46809
Job #:

Due Date:
Expiration Date: 12/23/2021
PO #:

<u>Part #</u>	<u>Customer Part #</u>	<u>Description</u>	<u>Quantity</u>	<u>Price/C</u>	<u>Extended Price</u>
MS2550020A200 00		M6 X 20 SHCS A-2	25	\$14.4800	\$3.62
M6-1.0 x 20mm ISO 4762/DIN 912 Hex Drive Grade A2-70 Stainless Steel Socket Cap Screw					
MS2550030A200 00		M6 X 30 SHCS A-2	25	\$16.7800	\$4.20
M6-1.0 x 30mm ISO 4762/DIN 912 Hex Drive Grade A2-70 Stainless Steel Socket Cap Screw					
MS2550040A200 00		M6 X 40 SHCS A-2	25	\$21.5800	\$5.40
M6-1.0 x 40mm ISO 4762/DIN 912 Hex Drive Grade A2-70 Stainless Steel Socket Cap Screw					
MS2550050A200 00		M6 X 50 SHCS A-2	10	\$24.4300	\$2.44
M6-1.0 x 50mm ISO 4762/DIN 912 Hex Drive A2-70 Stainless Steel Socket Cap Screw					
1139543		M5-0.8x8 12.9 SHCS	50	\$6.0200	\$3.01
M5-0.8 x 8mm ISO 4762 Hex Drive Class 12.9 Black Oxide Finish Alloy Steel Socket Cap Screw					
CAD Total:					\$18.67

Thank you,

FASTENAL
41B Sagona Ave.
MOUNT PEARL, NL A1N 4P9
Phone: (709)747-5969
Fax: (709)747-5968
E-mail: NFMOU@stores.fastenal.com



*Shipping & Handling charges are subject to change.

You'll notice that this quote from Fastenal doesn't include shipping costs. This could result in your purchase being rejected. Ensure that your quote "ALWAYS INCLUDES SHIPPING COSTS" unless you plan to pick up the parts.

The Rest of the Process

After you've submitted your purchase request form (with all required information and a signature), your grant administrator will code the purchase to your account. This means that they will show the purchase as pending and then forward the paperwork to our purchasing team. The purchasing team will then order the parts for you and notify you when they arrive. Then the items are all received, the order will be closed and then the vendor will be paid (unless the vendor only takes credit card, in which case they'll be paid in advance). When your items arrive they can be picked up from receiving in the SJ Carew Building. Purchasing is located in the loading bay area on the first floor (EN-1015).

If you have any concerns about the order, you can follow up with purchasing. However, they can only follow up on the orders and see where they are. If your order is time sensitive, then it's important to include the expedited shipping on the original purchase request.

ENGINEERING REQUISITION FORM

VENDOR NAME _____

VENDOR ADDRESS _____

VENDOR TELEPHONE _____

VENDOR CONTACT _____

VENDOR EMAIL _____

ORDER NUMBER _____

TO BE COMPLETED BY PURCHASING OFFICE

IMPORTANT, PLEASE STIPULATE FOAPAL:

DATE		REQUISITIONED BY		EMAIL	TEL. NO.	DATE REQ'D.	
ITEM	QUANTITY	PART NO.	DESCRIPTION			UNIT PRICE	TOTAL

Grant / Course Number _____

Grant / Course Approval _____

Departmental Approval _____

Date Approved _____

Quotes Attached (Shipping Included)

- \$0 - \$2,499 - 1 Written Quote
- \$2,500 - \$24,999 - 3 Written Quotes
- \$25,000 or Over Tender Required
- Tender not Required See Attached

S & H _____

GST _____

HST _____

TOTAL _____
