FINANCIAL ADMINISTRATION COMMUNITY TRAINING & SOLUTIONS

eShop How-To Sheets

Purchase Requisition Forms

This how-to sheet outlines the steps required to:

- Fill out a purchase requisition form.
- The information to fill out this form comes from a vendor's quote. Prior to filling out your requisition, make sure you received the required number of quotes.

eShop's purchase requisition form should be used for:

- Non-catalogue items, services (including consulting), and standing orders.
- Requisitioning goods or services above the $10,000 threshold, or for low dollar value purchases where the vendor does not accept a purchasing card.

Additional information is available:

- The Procurement Policy (available on the University Secretariat's website)
- The 'How to Buy' page on Procurement Services' page

THESE INSTRUCTIONS ASSUME YOU ARE WORKING FROM A DESKTOP COMPUTER/ LAPTOP

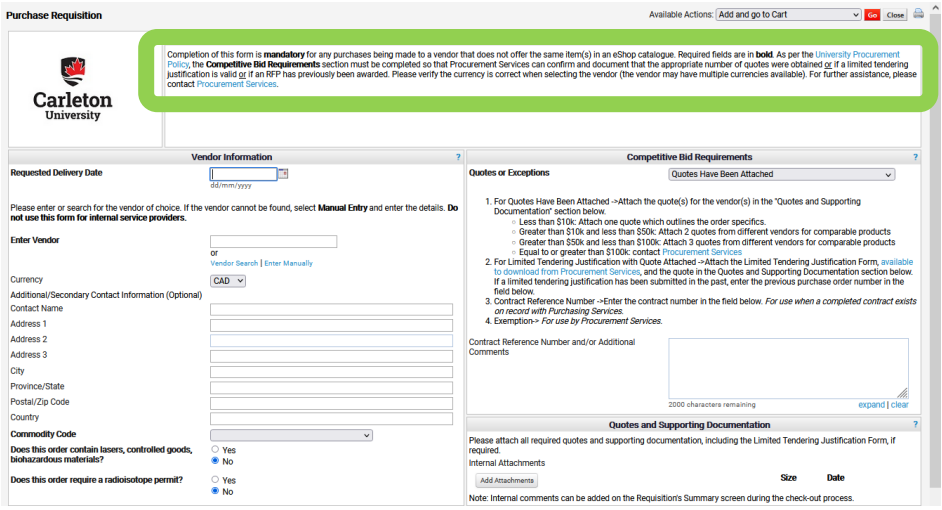
1. Once logged into eShop, scroll down to the 'Forms' box on the landing page.

   Click on the blue 'Purchase Requisition' text.

2. The first box on the form tells you what the form is for and any important information about filling it out.

Tip: If at any point you want to close the form, without saving it or adding it to a cart, click on the grey 'Close' button in the upper right-hand corner of the screen.

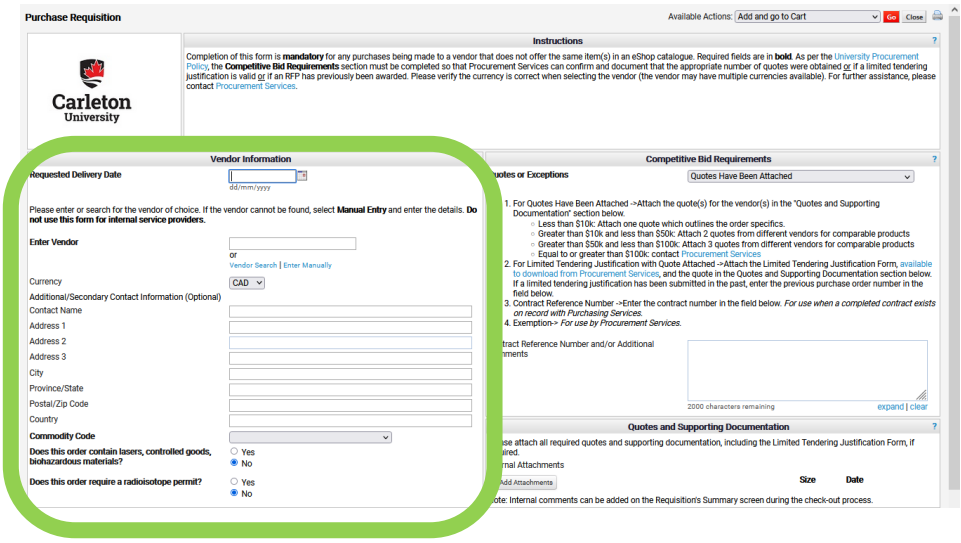
Tip: Only those fields with a bolded title must be filled in (e.g. 'Enter Vendor'.



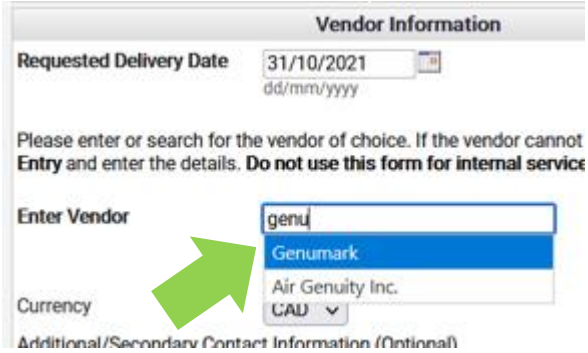
3a. **In the 'Vendor Information' box …**

Choose a 'Requested Delivery Date' with the date you want to receive the item on.

Begin typing the name of the vendor in the 'Enter Vendor' field.



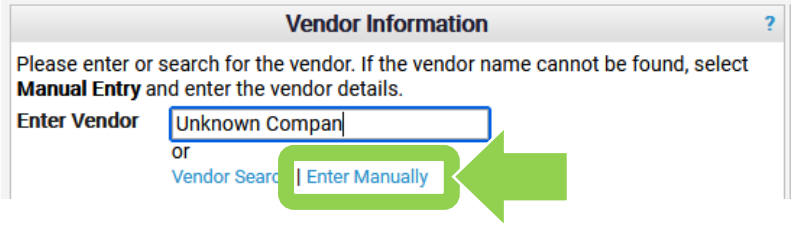
If the name of the vendor comes up, click on it. The information related to that vendor will fill in automatically.



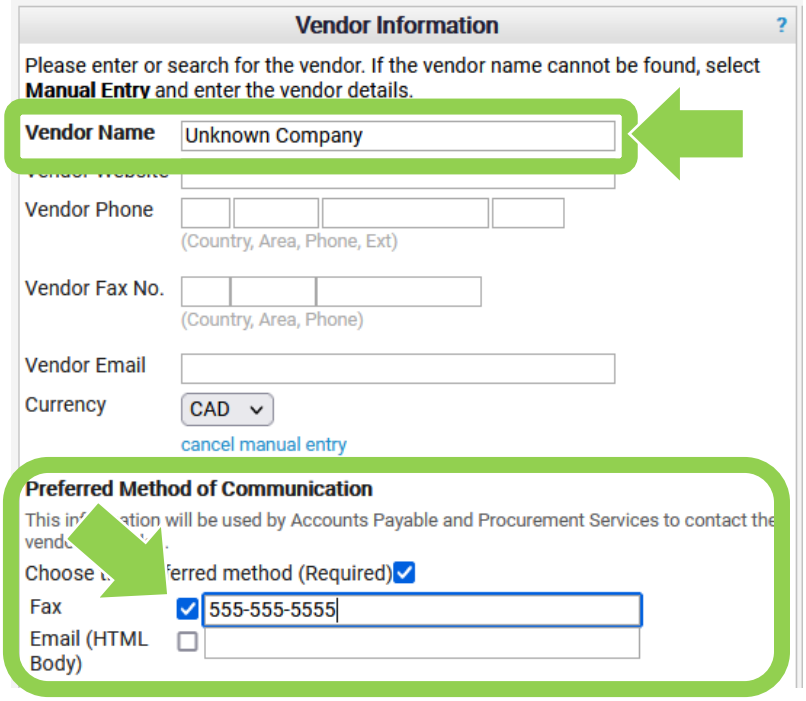
3b. **In the 'Vendor Information' box …**

If no result are returned …

Click the blue 'Enter Manually' text.



Type the vendor's name, as it appears on the quote, in the 'Vendor Name' field.

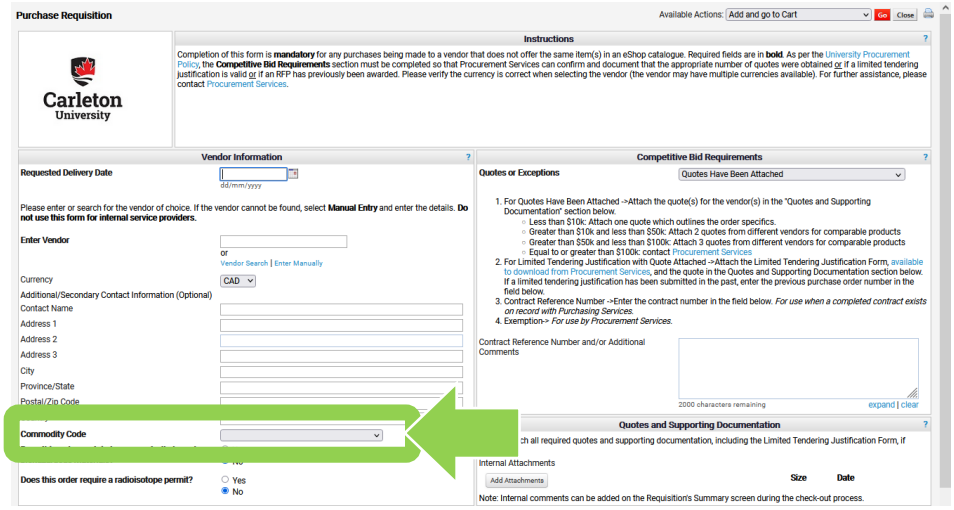


Choose the vendor's preferred method of communication by clicking on the radio box beside either the 'Fax' or 'Email' field AND enter the information.

3c. **In the 'Vendor Information' box …**

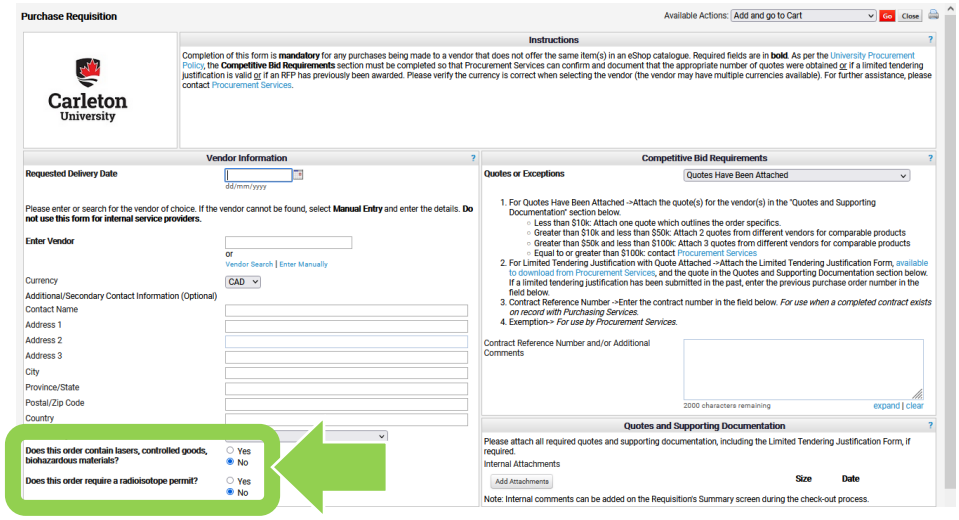
Choose the 'Commodity Code' that is the best fit for your purchase from the drop-down list.

Tip: Commodity codes allow eShop to route documents and compare like items. [If needed, there is a complete list of commodity codes and associated account codes available.]



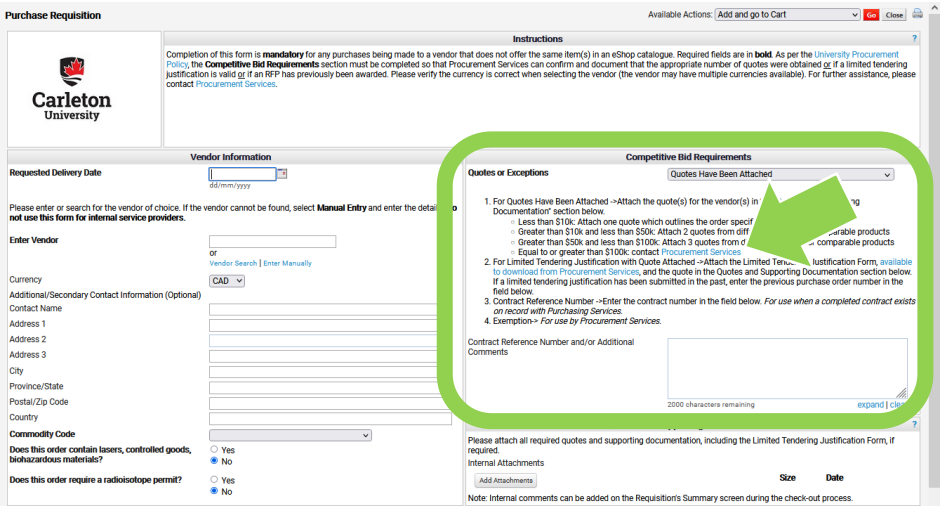
3d. **In the 'Vendor Information' box …**

Click on the radio button beside either 'Yes' or 'No' to answer each of the questions.



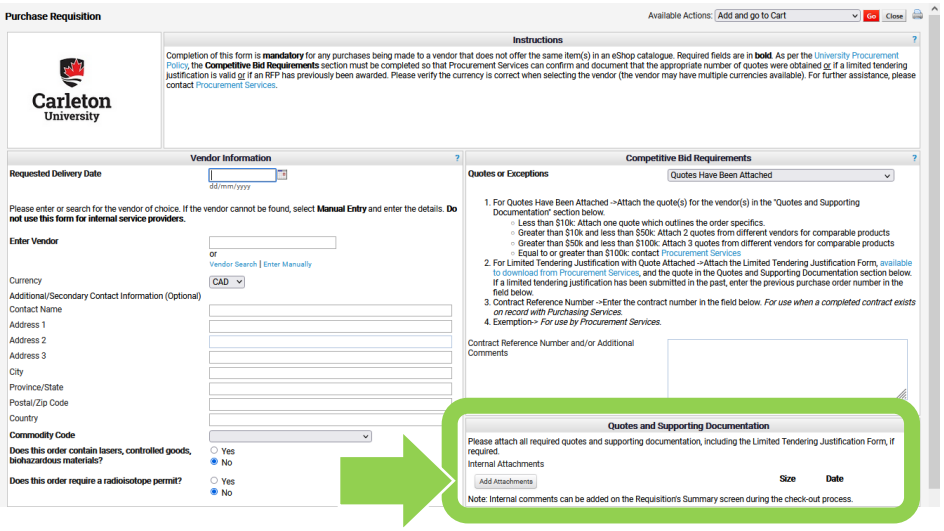
4. Follow the instructions in the ‘Competitive Bid Requirements’ box to fill in the required information.

   If you have questions, click on the blue ‘Procurement Services’ text.



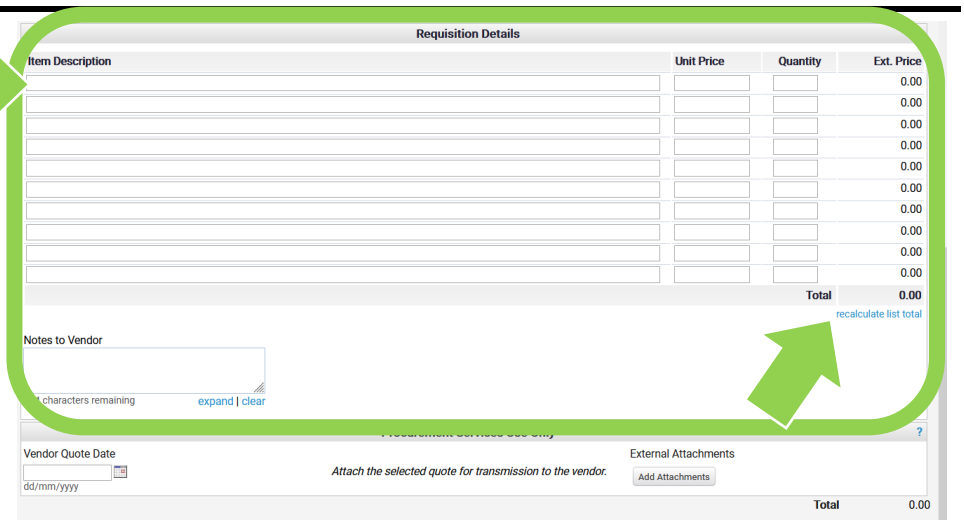
5. You must attach all relevant supporting documentation (e.g. quotes).

   In the ‘Quotes and Supporting Documentation’ box, click on the grey ‘Add Attachments’ button and follow the prompts to add required documentation.



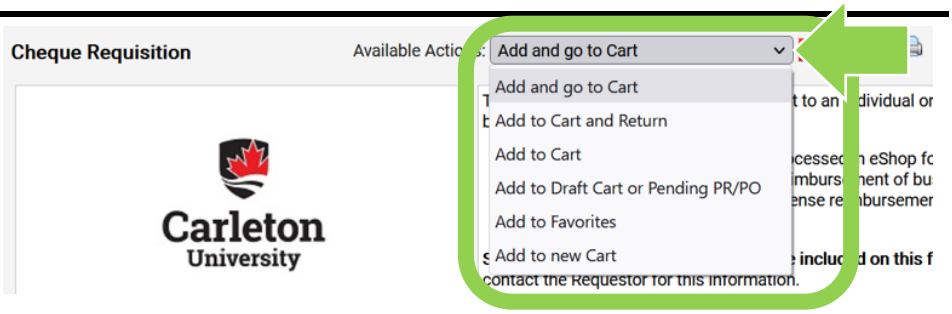
6. Referencing the vendor’s quote, enter each item in an ‘Item Description’ field with the corresponding ‘Unit Price’ and ‘Quantity’.

   Tip: Click on the blue ‘recalculate list total’ text to calculate the total.



7. Once you have completed the form, click on the 'Available Actions' drop-down menu to add the form to a cart (e.g. 'Add to Cart').

Tip: Purchase Requisition forms should not be added to a cart with anything else.



What next?

- Visit carleton.ca/facts/eshop to find more how-to sheets.
- Questions about the system? Email eshop@carleton.ca or call 613-520-2600 ext.3311.