

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.

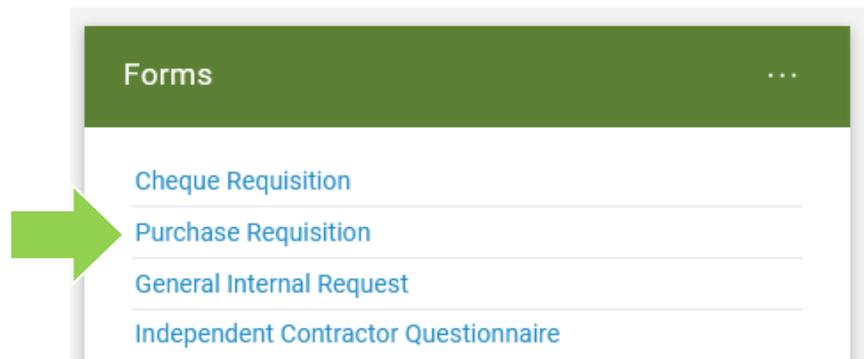
Additional information is available:

- 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'.

Completion of this form is **mandatory** for any purchases being made to a vendor that does not offer the same item(s) in an eShop catalogue. Required fields are in **bold**. As per the University Procurement Policy, the **Competitive Bid Requirements** section must be completed so that Procurement Services can confirm and document that the appropriate number of quotes were obtained **or** if a limited tendering justification is valid **or** if an RFP has previously been awarded. Please verify the currency is correct when selecting the vendor (the vendor may have multiple currencies available). For further assistance, please contact Procurement Services.

Requested Delivery Date [dd/mm/yyyy]

Please enter or search for the vendor of choice. If the vendor cannot be found, select **Manual Entry** and enter the details. **Do not use this form for internal service providers.**

Enter Vendor []

or
Vendor Search | Enter Manually

Currency: CAD

Additional/Secondary Contact Information (Optional)

Contact Name []

Address 1 []

Address 2 []

Address 3 []

City []

Province/State []

Postal/Zip Code []

Country []

Commodity Code []

Does this order contain lasers, controlled goods, biohazardous materials? Yes No

Does this order require a radiotope permit? Yes No

Quotes or Exceptions Quotes Have Been Attached

Competitive Bid Requirements Quotes Have Been Attached

- For Quotes Have Been Attached -> Attach the quote(s) for the vendor(s) in the "Quotes and Supporting Documentation" section below.
 - Less than \$10k: Attach one quote which outlines the order specifics.
 - Greater than \$10k and less than \$50k: Attach 2 quotes from different vendors for comparable products
 - Greater than \$50k and less than \$100k: Attach 3 quotes from different vendors for comparable products
 - Equal to or greater than \$100k: contact Procurement Services
- For Limited Tendering Justification with Quote Attached -> Attach the Limited Tendering Justification Form, available to download from Procurement Services, and the quote in the Quotes and Supporting Documentation section below. If a limited tendering justification has been submitted in the past, enter the previous purchase order number in the field below.
- Contract Reference Number - Enter the contract number in the field below. For use when a completed contract exists on record with Purchasing Services.
- Exemption - For use by Procurement Services.

Contract Reference Number and/or Additional Comments []

2000 characters remaining expand | clear

Quotes and Supporting Documentation

Please attach all required quotes and supporting documentation, including the Limited Tendering Justification Form, if required.

Internal Attachments

Add Attachments

Size	Date

Note: Internal comments can be added on the Requisition's Summary screen during the check-out process.

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.

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Requested Delivery Date 31/10/2021

Please enter or search for the vendor of choice. If the vendor cannot be found, select **Manual Entry** and enter the details. **Do not use this form for internal service providers.**

Enter Vendor genu

or
Vendor Search | Enter Manually

Currency: CAD

Additional/Secondary Contact Information (Optional)

Contact Name []

Address 1 []

Address 2 []

Address 3 []

City []

Province/State []

Postal/Zip Code []

Country []

Commodity Code []

Does this order contain lasers, controlled goods, biohazardous materials? Yes No

Does this order require a radiotope permit? Yes No

Quotes or Exceptions Quotes Have Been Attached

Competitive Bid Requirements Quotes Have Been Attached

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Please attach all required quotes and supporting documentation, including the Limited Tendering Justification Form, if required.

Internal Attachments

Add Attachments

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Note: Internal comments can be added on the Requisition's Summary screen during the check-out process.

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

Vendor Information

Requested Delivery Date 31/10/2021

Please enter or search for the vendor of choice. If the vendor cannot be found, select **Manual Entry** and enter the details. **Do not use this form for internal service providers.**

Enter Vendor genu

Genumark

Air Genuity Inc.

Currency: CAD

Additional/Secondary Contact Information (Optional)

3b. In the 'Vendor Information' box

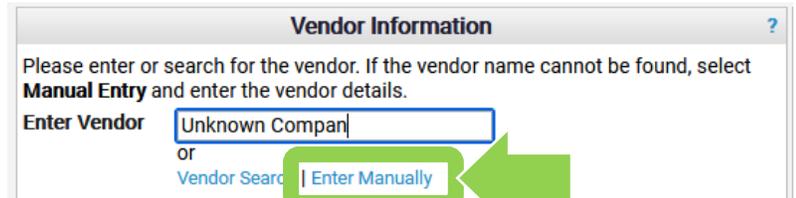
...

If no result are returned ...

Click the blue 'Enter Manually'
text.

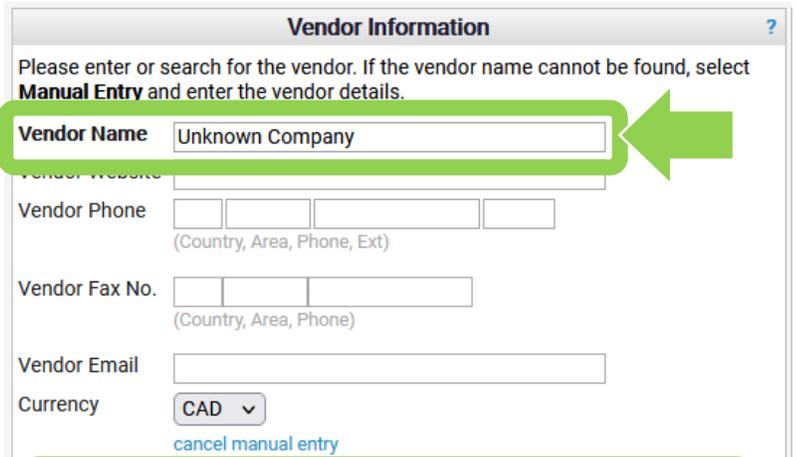
Type the vendor's name, as it
appears on the quote, in the
'Vendor Name' field.

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.



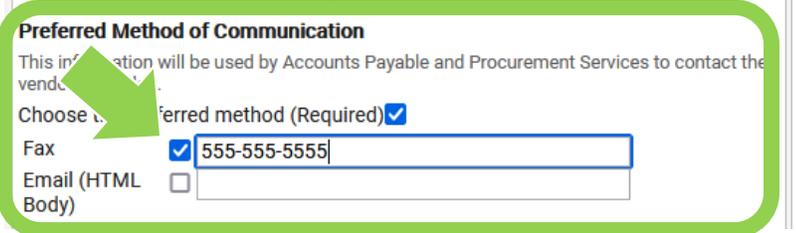
The screenshot shows the 'Vendor Information' form with the following elements:

- Header: **Vendor Information** with a help icon (?)
- Instruction: Please enter or search for the vendor. If the vendor name cannot be found, select **Manual Entry** and enter the vendor details.
- Input field: **Enter Vendor** with the text 'Unknown Compan'.
- Text: 'or'.
- Text: **Vendor Search** | **Enter Manually** (highlighted with a green box and arrow).



The screenshot shows the 'Vendor Information' form with the following elements:

- Header: **Vendor Information** with a help icon (?)
- Instruction: Please enter or search for the vendor. If the vendor name cannot be found, select **Manual Entry** and enter the vendor details.
- Input field: **Vendor Name** with the text 'Unknown Company' (highlighted with a green box and arrow).
- Text: **Vendor Website** (with an empty input field).
- Text: **Vendor Phone** (with four input fields for Country, Area, Phone, Ext) and '(Country, Area, Phone, Ext)'. Below it is '(Country, Area, Phone)'. Below that is '(Country, Area, Phone)'.
- Text: **Vendor Fax No.** (with three input fields).
- Text: **Vendor Email** (with an empty input field).
- Text: **Currency** with a dropdown menu showing 'CAD'.
- Text: [cancel manual entry](#)



The screenshot shows the 'Preferred Method of Communication' section with the following elements:

- Section Header: **Preferred Method of Communication**
- Text: This information will be used by Accounts Payable and Procurement Services to contact the vendor.
- Text: Choose a preferred method (Required)
- Text: **Fax** 555-555-5555 (with an input field containing the number)
- Text: **Email (HTML Body)** (with an empty input field)

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.](#)

Purchase Requisition

Completion of this form is **mandatory** for any purchases being made to a vendor that does not offer the same item(s) in an eShop catalogue. Required fields are in **bold**. As per the University Procurement Policy, the **Competitive Bid Requirements** section must be completed so that Procurement Services can confirm and document that the appropriate number of quotes were obtained. If a limited tendering justification is valid (i.e. if an RFP has previously been awarded). Please verify the currency is correct when selecting the vendor (the vendor may have multiple currencies available). For further assistance, please contact Procurement Services.

Vendor Information

Requested Delivery Date: dd/mm/yyyy

Please enter or search for the vendor of choice. If the vendor cannot be found, select **Manual Entry** and enter the details. **Do not use this form for internal service providers.**

Enter Vendor: [Text Field]

or

Vendor Search | Enter Manually

Currency: CAD

Additional/Secondary Contact Information (Optional)

Contact Name: [Text Field]

Address 1: [Text Field]

Address 2: [Text Field]

Address 3: [Text Field]

City: [Text Field]

Province/State: [Text Field]

Postal/Zip Code: [Text Field]

Commodity Code: [Dropdown Menu]

Does this order require a radioisotope permit? Yes No

Competitive Bid Requirements

Quotes Have Been Attached

1. For Quotes Have Been Attached - Attach the quote(s) for the vendor(s) in the 'Quotes and Supporting Documentation' section below.

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2. For Limited Tendering Justification with Quote Attached - Attach the Limited Tendering Justification Form, available to download from Procurement Services, and the quote in the Quotes and Supporting Documentation section below. If a limited tendering justification has been submitted in the past, enter the previous purchase order number in the field below.

3. Contract Reference Number - Enter the contract number in the field below. For use when a completed contract exists on record with Purchasing Services.

4. Exemption - For use by Procurement Services.

Contract Reference Number and/or Additional Comments: [Text Field]

2000 characters remaining expand | clear

Quotes and Supporting Documentation

Please attach all required quotes and supporting documentation, including the Limited Tendering Justification Form, if required.

Internal Attachments: [Table with columns: Add Attachments, Size, Date]

Note: Internal comments can be added on the Requisition Summary screen during the check-out process.

3d. In the 'Vendor Information' box

...

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

Purchase Requisition

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Vendor Information

Requested Delivery Date: dd/mm/yyyy

Please enter or search for the vendor of choice. If the vendor cannot be found, select **Manual Entry** and enter the details. **Do not use this form for internal service providers.**

Enter Vendor: [Text Field]

or

Vendor Search | Enter Manually

Currency: CAD

Additional/Secondary Contact Information (Optional)

Contact Name: [Text Field]

Address 1: [Text Field]

Address 2: [Text Field]

Address 3: [Text Field]

City: [Text Field]

Province/State: [Text Field]

Postal/Zip Code: [Text Field]

Country: [Text Field]

Does this order contain lasers, controlled goods, biohazardous materials? Yes No

Does this order require a radioisotope permit? Yes No

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Quotes and Supporting Documentation

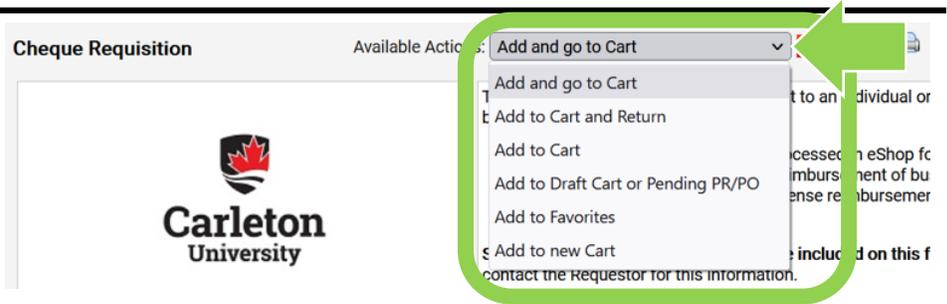
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7. Once you have completed the form, click on the 'Available Actions' drop-down menu to add the form to a cart (e.g. 'Add to Cart').

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.
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