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Chapter 1: Accessing eShop

This section will cover:
✓ Accessing eShop
✓ Your Username and Password
✓ Access Management
✓ Roles
✓ Logging Out

Accessing eShop

The gateway to the eShop system can be found at eshop.carleton.ca. It can be accessed at any time, from anywhere, without the use of the Virtual Private Network (VPN).

Your Username and Password

To log in, you must supply your MyCarletonOne credentials.

• Enter your USER NAME and PASSWORD.
• Click the red SIGN IN button.
If you cannot log in:

- The credentials you provided may be invalid, either because you entered the wrong user name/password combination, or you have not signed up for MyCarletonOne. Visit https://myone.carleton.ca if you experience this issue.
- Anyone who has posting or signing authority on a funding source should have access. Email financial_systems@carleton.ca if you have questions.

View ‘01. Signing into eShop for the First Time’ (carleton.ca/facts/eshop)
Access Management

You can request or update your funding source access through the Financial Access and Authority Management tool (FAAM) in Carleton Central. Visit carleton.ca/facts/faam for more information.

Roles

SHOPPER
- An individual who has access to shop the site, fill out forms, and assign their cart to a Requestor
- Currently granted manually by emailing eshop@carleton.ca

REQUESTOR (a.k.a. Requisitioner)
- An individual who has access to shop the site, fill out forms, and check out using funding sources for which they have posting or signing authority
- Automatically granted with financial access

FINANCIAL APPROVAL / SIGNING AUTHORITY
- An individual who has access to shop the site, fill out forms, and check out using funding sources for which they are a signing authority
- Notified of approval items on funding sources for which they are a signing authority
- Automatically granted with financial access
Chapter 1: Accessing eShop

Logging Out

To exit eShop:

- Click on **YOUR NAME** within the black dashboard in the upper right hand corner of your screen.

- From the drop down menu, choose **LOGOUT**.
Chapter 2: My Profile

This section will cover:

✓ Your Profile Components
✓ How to Update Key Profile Components

Your Profile Components

Each user has a unique profile. Your profile directs the eShop system on how to handle the documents you submit. You should check your profile the first time you log into eShop and anytime there are changes to your funding or reporting relationships.

To access your profile:

• Click on YOUR NAME in the black dashboard in the upper right hand corner of the screen.
• In the new window that opens up, choose the VIEW MY PROFILE option.

• From the My Profile page, the following profile component options are displayed.
How to Update Key Profile Components

These are the key components of your profile that you should review and customize.

User Profile and Preferences

User’s Name, Phone Number, Email, etc.

Your name, phone number, email, etcetera have been pre-populated with information from your records at Carleton. Review the information to ensure that it is correct.

If there are any issues, please email us at eshop@carleton.ca.

Default User Settings

Funding Defaults

Set a funding default ONLY if you have one funding source that you use most of the time. If you have many funding sources, it is best NOT TO set a default.

To set the funding default that you use most often:

- Choose DEFAULT USER SETTINGS from the menu on the left.
- Choose FUNDING DEFAULTS.
• In the window that opens up, choose the **FUNDING CODES** tab.

If you choose to set a funding default, ONLY set the index funding default.

• To enter default **INDEX**, choose the red **EDIT** button at the end of the index line.

• For index, choose from the list of indexes that you have access.
• Once you choose the index, you have the option to save it as your default by clicking the box beside **DEFAULT**.
• Click on the red **SAVE** button.
While there are other options under Funding Defaults, this is the only one that we recommend that you set a default for.

View ‘02. How to Access Funding Sources’ at carleton.ca/facts/eshop.

Default Addresses

Setting the default address will save you time with every transaction.

The address identifies where vendors should ship your order. To create default addresses:

- Choose **DEFAULT USER SETTINGS** from the menu on the left.
- Choose **DEFAULT ADDRESSES**.
• To make an existing shipping address your default, choose from the options under **SHIPPING ADDRESSES**.
• You have the option to save it as your default by clicking the box beside **DEFAULT**.
• Click on the red **SAVE** button.
Chapter 2: My Profile

To create a new address:

- Click on the red **SELECT ADDRESSES FOR PROFILE** button.
- Choose a building on campus OR off campus from the drop down menu.

**Default Addresses**

- If you choose ‘Off Campus’ you will have to enter the address.

Don’t forget to click on the red save button to save your changes.

View ‘01. Signing into eShop for the First Time’ at [carleton.ca/facts/eshop](http://carleton.ca/facts/eshop)
Chapter 2: My Profile

Notification Preferences

You will receive emails from eShop or notification within eShop itself related to your purchases and actions that need to be taken. Notifications within eShop will be flagged in the black dashboard in the upper right hand corner of the screen.

Notifications will be automatically set by the system, however, notification preferences allow you to adjust when and why you will receive emails and notifications from eShop.

Editing your notification preferences

- Click on **YOUR NAME** in the black dashboard in the upper right hand side of the screen.
- Click on **NOTIFICATION PREFERENCES** in the menu on the left.
- From the blue notification preferences options that appear, determine which category and then the line item you would like to change.

- Select **EDIT SELECTION**.
- To change a notification, select **OVERRIDE** and choose one of the following from the drop down menu: None, Email, Notification, Email, & Notification.
- Click the red **SAVE CHANGES** button.

Notifications associated with overdue goods receipts will be sent daily starting three days after receipt of an invoice.
Chapter 3: Shopping eShop

This section will cover:

✓ What to Expect from your eShop Shopping Experience
✓ Searching for Goods in eShop
✓ Shopping Hosted Catalogues
✓ Shopping Punchout Catalogues
✓ Shopping Level II Punchout Catalogues
✓ Shopping Internal Vendors
✓ You Did Not Find the Catalogue You Were Looking For
✓ Checking Out

What to Expect from your eShop Shopping Experience

Typically, when we make an online purchase it is from one online company. eShop is a little different in that it brings together goods from many companies into one website. Ideally, the shopping experience would be the same for each and every item in eShop. However, each company chooses how to display their goods. In eShop, a catalogue is simply the list of goods that a vendor has to offer.

The following types of catalogues tell you what to expect from your shopping experience:

HOSTED: The term ‘hosted’ tells me that a vendor has placed their catalogue into eShop, so my shopping experience will be like any other online shopping experience.

PUNCHOUT: Some vendors prefer to keep their catalogues on their own websites. When you select a punchout catalogue, you temporarily leave the eShop system to shop on a Carleton-specific section of the vendor’s site.

The functionality of each punchout catalogue will vary. However, none of their goods will appear in an eShop search for goods.
LEVEL II PUNCHOUT: These catalogues offer a cross between a hosted and a punchout catalogue. Goods from these vendors will appear in searches, however, you will have to temporarily leave the eShop system to find pricing.

INTERNAL: Internal catalogues are also like any other online shopping experience. The term ‘internal’ tells me that this is an internal Carleton University vendor like The Print Shop. The functionality of each internal catalogue will vary.

**Searching for Goods in eShop**

**Vendor Stickers**

When you arrive on the eShop landing page, your eye will likely be drawn to the vendor stickers that are being promoted. These stickers are organized into categories and are very useful if you know exactly which vendor that you want to buy from.

These vendors are being promoted on eShop’s homepage because they are vendors of record or preferred vendors.

![Vendor Stickers](image-url)
Chapter 3: Shopping eShop

Shop ‘from the Top’

Use this simple search toolbar to search for items from the eShop homepage:

- Enter a search term into the search field and click the red **GO** button.

The drop down menu also allows you to refine your search.

Example search results:

![Example search results](image)

Advanced Search

The advanced search window provides functionality to filter for specific criteria.

![Advanced search window](image)
Shopping Hosted Catalogues

The results from a search will yield a list of goods. Each option has the type of item, followed by the company name. To the right of the type of item is the price of the item followed by the currency. The currency should always be C-AD or Canadian funds.

Refining you Search

If your search does not yield the results that you are looking for, you may need to refine your search.

As an example, a broad search for pencils will return any good where the manufacture has used the word ‘pencil’ in the description. From the example below, you can see that actual pencils may not come up when you search using the word ‘pencil’. Instead, items related to pencils may come up first.

There are a number of ways to refine your search:

- Use more descriptive search words (e.g. ‘mechanical pencil’ vs ‘pencil’)
- Use ‘Filter Results’
- Use the ‘Sort By’ options

To use ‘Filter Results’, choose one or more of the ‘Filter Results’ options from the menu on the left. When getting started, ‘By Category’ is often the most useful. For
example, applying the ‘By Category’, ‘Mechanical Pencils’ filter limits the search to mechanical pencils and their leads.

If your search has fewer than 200 results, you can use the ‘Sort By’ option.
Adding a Good or Service to your Cart

- Add an item/s to your eShop cart by ENTERING THE QUANTITY and clicking on the red ADD TO CART button.

The amount of this item/s will be added to the total beside the cart icon in the black dashboard in the upper right hand corner of your screen.

View ‘03. Shopping eShop: Hosted Catalogues’ at carleton.ca/facts/eshop
Shopping Punchout Catalogues

Goods from punchout catalogues will not appear in search results (e.g. Shop ‘from the Top’, Advanced Search).

The easiest way to shop a punchout catalogue is to:

- From the homepage, click directly on the VENDOR STICKER.

Read the next section, ‘Punchout Level II Catalogues’ to find out how to navigate a punchout catalogue.

View ‘04. Shopping eShop: Punchout Catalogues’ at carleton.ca/facts/eshop
Shopping Punchout Level II Catalogues

Like a hosted catalogue, goods from a Punchout Level II catalogue will appear in search results. Each option has the type of item, followed by the company name.

The difference is, to the right of the type of item are the words ORDER FROM VENDOR. To find out the price, you have to temporarily leave eShop and go to the vendor’s website by:

- Clicking on ORDER FROM VENDOR.

This will take you to a secure Carleton-specific page on that vendor’s website.

*NOTE: You can exit the punchout at any time by choosing the red CANCEL PUNCHOUT button in the upper right hand corner.*
• To add this item to your eShop cart, click on **PRICING**.

• When the pricing information opens up, **ENTER THE QUANTITY**.

• Click on the red **ADD TO CART** button.

• Click on the red **CHECK OUT** button to add the item to your eShop cart.

• Click on the blue **CONTINUE SHOPPING** text or the red **PROCEED TO CHECKOUT** button, depending on what you would like to do.

• You will find that it is very useful to choose a meaningful name for your carts. This will help you track documents.
If you choose to continue shopping, simply repeat the above steps until your cart is full.

NOTE: Just as they do on any other website, the look/feel and steps required to add an item to a cart and checkout will vary by vendor.

View ‘05. Shopping eShop: Punchout Level II Catalogues’ at carleton.ca/facts/eshop.

Shopping Internal Vendors

Like Hosted catalogues, Internal catalogues display all of the information and prices that an internal vendor has to offer. You will search for goods and shop the same way. The only difference is that when you click on the Internal Catalogue stickers on the homepage you will have the additional option to search forms (see chapter 4: Filling Out eShop Forms to find out more).

You Did Not Find the Catalogue you were Looking For

If you have searched eShop and you have not found the catalogue or good or service that you were looking for, you can try one of the following ....

‘Non-Catalogue Quick Order’ Form

If you know the item and part number, you can use a ‘non-catalogue quick order’ to order the item if the following are true:

- Your information is accurate (e.g. part number)
- The catalogue is corporate. For example, you could use this form for a good from Staples Advantage (the corporate version of Staples) but not Staples.ca.
• The vendor exists in eShop (i.e. you do not have the option to enter the vendor manually on this form)

From the homepage, you’ll find the link to the ‘non-catalogue quick order’ under the ‘shop from the top.’

![Non-Catalog Item Form]

• To fill out the form, simply fill in the bolded fields and the ‘Commodity Code’ field.

**Pcard**

You still have the option to use your Pcard if you cannot find a good or service in eShop. For example, you must use a Pcard to place orders for Staples.ca.

Keep in mind that using a Pcard for those items that are available in eShop hinders the university’s ability to track spending and negotiate better contacts with our vendors.

**Checking Out**

Once your cart is full:

• Click on the **CART ICON** in the black dashboard.
• Click on the red **PROCEED TO CHECKOUT** button check out.

**You Do Not Have Any Warnings**

If you have set your default address and funding default (see Chapter 2), you'll likely be in a position to submit your requisition. The banner at the top of the screen will be green and the 'submit requisition' button will be enabled.

It is a good idea to give the cart a meaningful name. To do this, click on the blue **EDIT** text. This will make it easier to find the cart later. The name of the cart will also become the name of the requisition.
• Review the details of the requisition and then click on the red **SUBMIT REQUISITION** button.

The following confirmation will appear on the screen.

**Requisition Submitted**

**Next Steps**
You can view or print this at: Requisition 1491762, or via the Document Search page

- View Approval Status
- Search for another item
- View order history
- Check the status of an order
- Return to your home page
- Create new draft cart

**You Have Received a Warning/s – What Next?**

Warnings that your requisition cannot be submitted will be yellow. The most common warnings that will prevent you from submitting your requisition are missing funding or address information. Setting your address default will help. Read Chapter 2 to find out how.
To add the address from this screen you will:

- Click on **REQUIRED FIELD** in the yellow warning.

- In the window that opens up, choose your address from the drop down menu OR click on the blue **CLICK HERE** text to choose a different address on campus OR to enter an off campus address.

To add the funding from this screen you will:

- Click on **EXPENSE FUNDING** from the menu on the left.
This will give you the option to edit the funding line item.

- Click on the grey **EDIT** button.

- Click on the blue **SELECT FROM PROFILE VALUES** text to access the drop down menu.

- Click on the drop down menu to view the indexes that you have access to.
• Click on the index that you would like this purchase charted to.

• An Account code will be automatically populated based on the commodity code provided by the vendor (i.e. when ordering from a catalogue) or the commodity code that you have chosen (e.g. when filling out a Purchase Requisition)

• You can choose an alternate account code by clicking on ‘Select from all values’

If you do not have access to the Index or Account code that you require, email eShop@carleton.ca.

View ‘02. How to Create Index and Activity Code Lists’ to find out how to build a quick list of frequently used activity codes at carleton.ca/facts/eshop.

In this example you would now be able to submit your cart. All of the arrows in the menu on the right are green (note that Taxes, Shipping and Handling does not get checked).
• Review the details of the requisition and then click on the red **SUBMIT REQUISITION** button.
Chapter 4: Filling Out eShop Forms

This section will cover:

✓ Before you Begin …
✓ Filling out Purchase Requisition Forms
✓ Filling out a Cheque Requisition for Payment to a Vendor
✓ Filling out a Cheque Requisition for Payment to an Independent Contractor
✓ Filling out Internal Service Provider Forms
✓ Non Catalogue Quick Order

Before you begin …

When you begin filling out forms and adding them to carts you need to be aware of the following …

PURCHASE REQUISITIONS
You can combine catalogue items and purchase requisitions in one cart. However, all of the items in the cart will go through approvals together. Keep in mind that goods and services with larger dollar values and/or purchasing requirements will likely have more approval steps.

CHEQUE REQUISITIONS
When using eShop cheque requisitions:

• When filling out the cheque requisition form: You CANNOT bundle multiple invoices into one cheque requisition form.
• When you add a cheque requisition to a cart: There can ONLY be cheque requisitions in a cart.
• We recommend that you ONLY put one cheque requisition in a cart at a time. However, more than one cheque requisition can be put into a cart as long as there is only one per vendor. Adding two or more cheque requisitions from a single vendor in the same cart will cause delays in processing your requisition.
INTERNAL SERVICE PROVIDER
You can combine catalogue items and internal service provider forms in one cart. However, all of the items in the cart will go through approvals together. Keep this in mind if you have multiple requests related to the same event. For example, you may not want to have a moving request with a room booking travelling through approvals together.

NON-CATALOGUE QUICK ORDER
A ‘non-catalogue quick order’ form cannot be used for the following:

- Vendors that are not already in eShop

Filling out Purchase Requisition Forms

When to Use the Purchase Requisition Form
Completion of this form is mandatory if:

- You cannot find goods/service in the catalogue AND
- Your purchase is over $10,000

Before you Fill Out the Purchase Requisition Form
Prior to filling out your requisition, make sure you received the requisite number of quotes as required by the Procurement Policy (carleton.ca/secretariat/policies/). You are going to need the exact information from the vendor in order to proceed.

How to find the Purchase Requisition Form
The easiest way to find the Purchase Requisition Form is to:

- Click on the PURCHASE REQUISITION FORM STICKER on the homepage, at the bottom of the vendor showcase in the Internal Services Forms category.
Filling out the Purchase Requisition Form

The box at the very top labelled **FORM INSTRUCTIONS** tells you what the form is for and any important information about filling it out. For example, all required fields are bolded.

Beginning on the left side of the form:

- Enter the **REQUESTED DELIVERY DATE** that you’d like to receive the item on.
- **ENTER VENDOR** by entering the vendor name in the field. If the vendor is in the system, the name will auto complete as you type.
- If the vendor does not autocomplete, you can also click on the blue **VENDOR SEARCH** text beneath the enter vendor field.
- If the vendor does not exist in eShop, you can enter it manually by clicking on the **ENTER MANUALLY** option in blue text beneath the enter vendor field and entering the required information.
- If you enter the vendor manually, you must choose the vendor’s **PREFERRED METHOD OF COMMUNICATION** by clicking the box beside either **FAX** or **EMAIL** and entering either the fax and/or email address that the vendor has provided in the quote.

Commodity codes are part of the ‘nuts and bolts’ of eShop. It’s what allows us to route documents and compare like items. On a purchase requisition, you need to tell eShop what you are requesting.
• Use the drop down box to find the **COMMODITY CODE** which is the best fit for your product.

**NOTE:** Professional and technical services are bundled as 8000.

• Answer yes or no to the question **DOES THIS ORDER CONTAIN LASERS, CONTROLLED GOODS, BIOHAZARDOUS MATERIALS?** by clicking on the circle.
• Answer yes or no to the question **DOES THIS ORDER REQUIRE A RADIOISOTOPE PERMIT?** by clicking on the circle.
• Enter the **ITEM DESCRIPTION, UNIT PRICE, and QUANTITY** in the available fields. Repeat as necessary.

Going to the top right of the form:

• Choose the **QUOTES OR EXCEPTION TYPE** from the drop down menu.
• Attach **QUOTES AND SUPPORTING DOCUMENTATION** by clicking the grey **ADD ATTACHMENTS** button.

**Submitting the Purchase Requisition Form**

• In the upper right hand corner of the screen, choose from the **AVAILABLE ACTIONS** by clicking on the drop down arrow.
• Choose **ADD AND GO TO CART**.
• Click on the red **GO** button.

• See page 22 of this guide for instructions on checking out.

**NOTE:** When the purchase order is encumbered in the General Ledger, everything in one purchase requisition form will appear as one line item.

View ‘07. Filling Out eShop Forms: Purchase Requisitions’ at carleton.ca/facts/eshop
Filling out a Cheque Requisition for Payment to a Vendor

When to Use the Cheque Requisition Form

The eShop cheque requisition form should be used to request payment to an individual or vendor when the following criteria have been met:

- A purchase order HAS NOT been processed for the invoice received, and
- The payment is not for personal reimbursement of business expenses (travel and non-travel claims as well as professional expense reimbursement must be done using the Travel and Expense Reimbursement System).

Social Insurance Numbers should NEVER be included on this form. If required, Accounts Payable will contact the Requestor for this information.

How to find the Cheque Requisition Form

The easiest way to find the Cheque Requisition Form is to:

- Click on the CHEQUE REQUISITION FORM STICKER on the homepage, at the bottom of the vendor showcase in the Internal Services Forms category.

Filling out the Cheque Requisition Form

The box at the very top right of the form tells you what the form is for and any important information about filling it out. For example, all required fields are bolded.
The following boxes are NOT required for payments to a vendor:

- Payments to individuals and sole proprietorships for services.
- Services performed outside Canada.

Complete the **VENDOR INFORMATION** section:

- **ENTER VENDOR** by entering the vendor name in the field. If the vendor is in the system, the name will autocomplete as you type.
- If the vendor does not autocomplete, you can also click on the blue **VENDOR SEARCH** text beneath the enter vendor field.
- If the vendor does not exist in eShop, you can enter it manually by clicking on the **ENTER MANUALLY** option in blue text beneath the enter vendor field and entering the required information.
- If you enter the vendor manually, you must choose the vendor’s **PREFERRED METHOD OF COMMUNICATION** by clicking the box beside either **FAX** or **EMAIL** and entering either the fax and/or email address that the vendor has provided in the quote.

Complete the **PAYMENT INFORMATION** section:

- Use the drop down arrow to find the **COMMODITY CODE** which is the best fit for your product or service.
Commodity codes are part of the ‘nuts and bolts’ of eShop. It’s what allows us to route documents and compare like items. On a cheque requisition, you need to tell eShop what you are requesting.

To find a complete list of commodity codes and associated account codes:

http://carleton.ca/facts/eshop/eshop-frequently-asked-questions/

Funding

- Where can I find the complete list of commodity codes and associated account codes?

- Enter the PAYMENT AMOUNT BEFORE TAXES in the field.
- Answer the question IS THERE TAX ON THIS INVOICE? by clicking the box for yes. Leaving the box blank for no.
- Choose the INVOICE DATE by clicking on the calendar icon beside the field.

If the invoice is in a foreign currency:

- Complete the REQUESTED PAYMENT METHOD from the drop down menu AND
- Follow the instructions in the PAYMENT INSTRUCTIONS section of the form
- Attach ALL RELEVANT SUPPORTING DOCUMENTATION, INCLUDING A COPY OF THE INVOICE by clicking the grey ADD ATTACHMENTS button.

Submitting the Cheque Requisition Form

- In the upper right hand corner of the screen, choose from the AVAILABLE ACTIONS by clicking on the drop down arrow.
- Choose ADD AND GO TO CART.
- Click on the red GO button.

Available Actions: Add and go to Cart [Go] Close

- See page 22 of this guide for instructions on checking out.
- See page 29 of this guide to find out more about adding forms to carts.

View ‘08a. Filling Out eShop Forms: Cheque Requisitions for Payment to a Vendor’ at carleton.ca/facts/eshop
### Filling out a Cheque Requisition for Payment to an Independent Contractor

An Independent Contractor is a status identifying the nature of the relationship between an individual providing a service and Carleton, as outlined and applied by the Canada Revenue Agency (CRA). CRA has prepared a guide to help entities determine the nature of their working arrangement as either employer/employee or one of an independent contractor providing a service to a third party.

**Why is this important?**

This determination dictates whether the individual will be paid through payroll and have taxes deducted at source or will be responsible for reporting and remitting to CRA directly.

It is important for the University to properly classify Independent Contractors. Unlike employees, Independent Contractors do not have employment taxes withheld and are not eligible for University benefits. If an individual is incorrectly classified as an Independent Contractor and should have been hired as an employee, the University/department could be assessed fines by the CRA and/or be required to pay damages to individuals.

**How does this apply to the Cheque Requisition Form?**

At Carleton, we capture this assessment in the Independent Contractor Questionnaire. This form must be completed prior to any payment made to an individual not already an employee of Carleton University.

The section of the cheque requisition form which addresses this is called PAYMENTS TO INDIVIDUALS AND SOLE PROPRIETORSHIPS FOR SERVICES. Read the instructions in this section.

- If you have already completed the independent contractor questionnaire, enter the number in the INDEPENDENT CONTRACTOR # field. And then complete the cheque requisition as outlined in the previous section.
- If you have NOT completed the Independent Contractor Questionnaire, you must do so before completing the cheque requisition form. The quickest way to find this form is by clicking on the blue FORMS text under the shop from the top search.
• From the options, click on the red **VIEW FORM** button.

• Once the individual has been assessed as an independent contractor, then you may complete the cheque requisition form as outlined in the previous section.

Please contact Accounts_Payable@carleton.ca should you require assistance in completing this form.

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**Filling Out Internal Service Provider Forms**

An eShop internal request form may be used in one of two ways.

**Option 1:** After contacting the service department, their representative will complete the form with the order/charge details and estimated amounts. The representative will then assign a shopping cart to you with the completed form as a line item. Review the form in the line item of the cart and then submit the requisition to indicate that you agree/approve of the details and estimate.

**Option 2:** If you have not contacted the service department, fill out as much of the information to identify the nature of your request. You do not need to specify any amounts. Add the form to your cart, and then submit the requisition. A representative from the service department will receive and review your request, update it with the estimated costs, and return it back to you for your review and approval/resubmission.

**Where to find the Internal Service Provider Form**

• The easiest way to find these forms is to click on the **ALL FORMS** sticker at the bottom of the vendor showcase on the homepage.
• In the new screen, choose the appropriate **SHARED** folder menu on the left to see a list of their form options. If a form is not listed for the department, please contact them to discuss your requirements.

**How to fill out the Internal Service Provider Form**

• Each form is a little different. Follow the instructions found at the top of each form.

**Submitting the Internal Service Provider Form**

*NOTE: Each internal service provider may have a preferred method for receiving your request. The form you select will indicate the preferred method; however, if you have any questions, please contact the service provider using the contact information provided in the form.*

• In the upper right hand corner of the screen, choose from the **AVAILABLE ACTIONS** by clicking on the drop down arrow.
• Choose **ADD AND GO TO CART**.
• Click on the red **GO** button.

*Available Actions: Add and go to cart [Go Close]*

• See page 22 of this guide for instructions on checking out.

**What happens next?**

The approval path that your shopping cart takes once it becomes a requisition document will depend on your roles (i.e. Shopper, Requisitioner, Approver), the items in the cart (form or catalogue), and the type of funding being used to pay for the request.

If your service provider form requires an estimate, a representative from the service department will review the form and update it with the estimate, and return it back to you for review, approval and resubmission.

Alternatively, a service department may complete a form, add it to a shopping cart, and assign the cart to the person who requested the service so that they can submit it as a requisition. Forms that are marked for estimate will still need to route to the service provider in this scenario; however, the service provider will not need to return it to the shopper for review.

At the end of the requisition workflow, eShop will email the finalized purchase order to the service department.
Once the order has been fulfilled, the service department will complete the financial recovery process. At the end of recovery, the shopper will be sent an email indicating that the billing is complete.

**Non-Catalogue Quick Order**

If you know the item and part number, you can use a ‘non-catalogue quick order’ to order the item if the following are true:

- Your information is accurate (e.g. part number)
- The catalogue is corporate. For example, you could use this form for a good from Staples Advantage (the corporate version of staples) but not Staples.ca.
- The vendor exists in eShop (i.e. you do not have the option to enter the vendor manually on this form)
- Your order is $10,000 or less
- Your order is not for an internal service/to an internal service provider

From the homepage, you’ll find the link to the ‘non-catalogue quick order’ under the ‘shop from the top.’

To fill out the form, simply fill in the bolded fields and the ‘Commodity Code’ field.
Chapter 5: Tracking and Searching Documents

This section will cover:
✓ From Cart to Requisition
✓ Tracking Requisitions as They Move Through Approvals
✓ Quick Searches
✓ About Documents: Types

From Cart to Requisition

Once you submit a cart in eShop it is called a requisition. Once the requisition moves through approvals, it becomes a purchase order which is sent to the vendor.

Tracking Requisitions as They Move Through Approvals

The easiest way to track your requisitions is to view ‘My Pending Requisitions’ or ‘My Recently Completed Requisitions’ from the home page.

To find these tools:

- Click on **THE PERSON SILHOUETTE** found in the dashboard in the upper right hand side of your screen ( ▼ ).
- At the bottom of the list, you will find ‘My Pending Requisitions’, ‘My Pending Purchase Orders’ or you may have another option.
- Click on the option that you are interested in.
My Pending Requisitions and My Pending Purchase Orders will show you all of the requisitions or purchase orders that you have submitted and are currently working their way through approvals.

My Recently Completed Requisitions (not shown) will show you all of the requisitions that have made it through approvals in the last 90 days.

My Recently Completed Purchase Orders (not shown) will show you all of the purchase orders that have been created for requisitions in the last 90 days.

- Click on the REQUISITION NO. (or purchase order) that you would like to track.

In the new window that opens up, there will be a menu on the left hand side of the screen.

- From this menu, choose PR APPROVALS.
You can see where your requisition is in the workflow.

- To find out how long it has been at a particular step in the workflow, click on the blue HISTORY text.
Chapter 5: Tracking and Searching Documents

Quick Searches

There are several ways to find documents, such as requisitions, purchase orders, goods receipts and invoices.

Quick Search

If you know the document number, enter it in the ‘Search (Alt+Q)’ field at the top of the screen and click enter.

Documents Search

If you don’t know the document number, the Orders Search allows you to search through all of your documents in the eShop system.

To find the Orders Search:

- From the homepage, click on the orders icon on the far left hand side of the screen.

  - Choose SEARCH and ALL ORDERS.

This search window will appear.

There are many search options. The first section is a drop down list that filters by document type (explained in the next section); the second section lets you specify the dates for a search; while the third section is a text field that allows you to search by document number, requisition name or supplier name.
About Documents: Type

REQUISITION
All forms and carts create a requisition document and are assigned an 8-digit requisition number.

PURCHASE ORDER
Once a requisition is approved and becomes a purchase order it will be temporarily assigned an 8-digit PO number which will be updated to a Carleton PO number (Pxxx xxxx) once it has posted to Banner/FAST.

INVOICE
Once an invoice is received, it will also be assigned an 8-digit number starting with an E.

Special Note about Cheque Requisitions
A cheque requisition also creates a requisition, an eShop purchase order and an invoice. You will see these as ONLY an invoice in FAST, starting with E.

Quick Tip
If you search on a cart name, you may see up to 4 documents related to your cart. This depends on what is in the cart and where it is in the workflow.
This section will cover:

- When is Receipting Required?
- Knowing When to Receipt
- How to Receipt
- Other Receipting Options

When is Receipting Required?

This step is required for purchase orders of goods and services valued at $10,000 or more. Essentially, for large purchases the University needs to know if you have actually received it before we pay the invoice.

Knowing When to Receipt

Once you receive the good/s, it is time to receipt.

If Accounts Payable receives an invoice for a good or service, and you have not yet received it, eShop will send you emails and internal notifications daily starting three days after receipt of an invoice to remind you to create your receipt when you receive the goods.

How to Receipt

From the eShop homepage:

- click on the ACCOUNTS PAYABLE ICON on the far left hand side of your screen.
• From the window that opens up, click on the **AP DASHBOARD** option.

![AP Dashboard](image)

• In the AP Dashboard, you will use the **CREATE** section.

![Create Section](image)

To create a receipt for that good or service you:

• (1) Choose the **TYPE**. For goods you’d generally choose ‘quantity receipt’ which is the default. For services you’d generally choose ‘cost receipt’ from drop down menu.

• (2) Skip the **FROM**. The default, PO, is the only option.

• (3) Enter the **PO NUMBER**.

If you need to remind yourself what the PO number is, you can search for it in eShop. Watch the ‘Searching Document’ video to find out how. You will also receive email reminders from eShop to receipt. The PO number will also be in this email.
eShop has pulled all of the information from the PO into the new window that has opened up.

It is a good idea to create meaningful names for your documents.

The most important part of receipting is to ensure that the quantity is correct.

The default will always be ‘received’ and the full amount that you ordered. If you received the full order, just leave it as it is.

If your order was incomplete, then you would enter the amount that you received. When you receive the remaining items you would complete another receipt by following these same steps. When you enter the PO number, eShop will know that you are creating a follow-up receipt.
• To finish, click on the red **COMPLETE** button in the bottom right hand corner of your screen.

Choosing the red SAVE button will not complete the receipt. If you receive a reminder to receipt after you have already done it, you may have clicked on the save button instead of the complete button.

View ‘11. Receipting Your Purchase’ at carleton.ca/facts/eshop

### Other Receipting Options

#### Returning Goods

In the event that item(s) are damaged, defective, incorrect, etcetera upon delivery, you must contact the vendor. If you are able to return the goods, you can choose **RETURNED** from the **LINE STATUS** drop down menu.

You would use this option if you had to return the item. You will be asked to provide a reason why the item was returned. For example, the item may have been damaged.

*Keep in mind that return policies vary by vendors. So check with vendors directly or Procurement Services if we have a contract with a vendor. If you received an RMA number when you contacted the vendor, enter it in the RMA number field.*

#### Cancelled Orders

You can also choose ‘cancelled’ from the **LINE STATUS** if the order was cancelled.
Need Help?

Visit our FAQ section on carleton.ca/eshop/faq

Watch our video tutorials at www.carleton.ca/facts/eshop.

Attend a hands-on training session through the Financial Administration Community Training and Solutions (FACTS) program. Email us at facts@carleton.ca or visit www.carleton.ca/facts for current course offerings.

Email eshop@carleton.ca