

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 \$25,000 threshold, or for low dollar value purchases where the vendor does not accept a purchasing card.

Additional information is available:

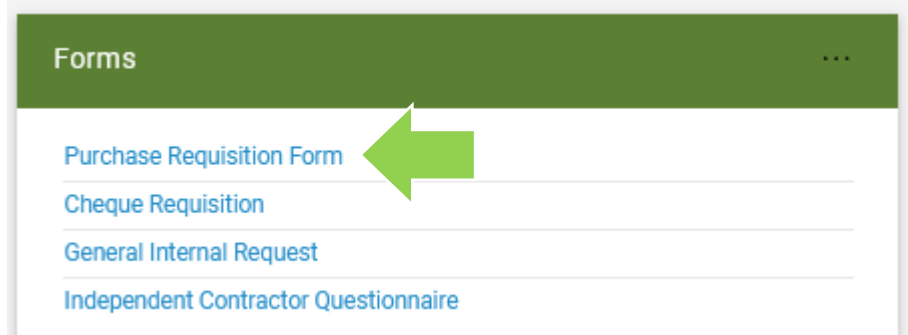
- The Procurement Policy ([available on the University Secretariat's website](#))
- [The 'How to Buy' page on Procurement Services' page](#)

Last updated May 24th, 2024.

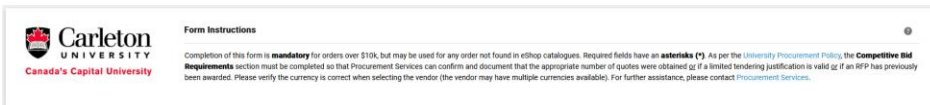
THESE INSTRUCTIONS ASSUME YOU ARE WORKING FROM A DESKTOP COMPUTER/ LAPTOP

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

Click on the blue **'Purchase Requisition Form'** text.



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2. The first section 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 star 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.


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.

Existing Vendor Enter Manually

Enter Vendor * 

Currency 

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 radioisotope permit? * Yes No


Vendor Information

Requested Delivery Date * 

Please enter or search for the vendor of choice. If the vendor cannot be found, select **Manual Entry** a for internal service providers.

Existing Vendor Enter Manually

Enter Vendor * 

Genumark 

3b. In the 'Vendor Information' box

...

If no result are returned ...

Click the 'Enter Manually' tab.

The screenshot shows the 'Vendor Information' form. At the top, there is a 'Requested Delivery Date *' field with the value '03/08/2016' and a calendar icon. Below this is a search instruction: 'Please enter or search for the vendor of choice. If the vendor cannot be found, select **Manual Entry** and enter the details.' There are two tabs: 'Existing Vendor' and 'Enter Manually'. The 'Enter Manually' tab is highlighted with a green box and a green arrow pointing to it. Below the tabs is an 'Enter Vendor *' search box containing the text 'unknown company|' and a search icon. A dropdown menu is open below the search box, showing 'Try searching again' and 'CAD'.

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

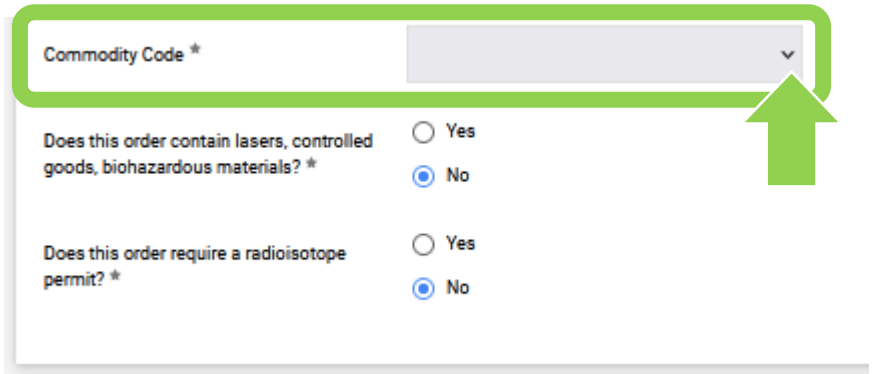
The screenshot shows the 'Vendor Information' form with the 'Enter Manually' tab selected. The 'Vendor Name *' field is highlighted with a green box and a green arrow pointing to it, containing the text 'Unknown Company'. Below this are fields for 'Vendor Website', 'Vendor Phone' (with sub-fields for Country, Area, Phone, Ext), and 'Vendor Fax No.' (with sub-fields for Country, Area, Phone). The 'Vendor Email' field is also present. At the bottom, there is a 'Currency' dropdown menu set to 'CAD'. A section titled 'Distribution Method *' is highlighted with a green box. It contains the text 'This information will be used by Accounts Payable and Purchasing Services to contact the vendor, if needed.' and a checked radio button for 'Choose the preferred method (Required)'. Below this are two radio buttons: 'Fax' (checked) with the value '555-555-5555' in the adjacent field, and 'Email (HTML Body)' (unchecked).

Choose the vendor's preferred method of communication by clicking on the radio box beside either the 'Fax' or 'Email (HTML Body)' 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.](#)



Commodity Code *

Does this order contain lasers, controlled goods, biohazardous materials? *

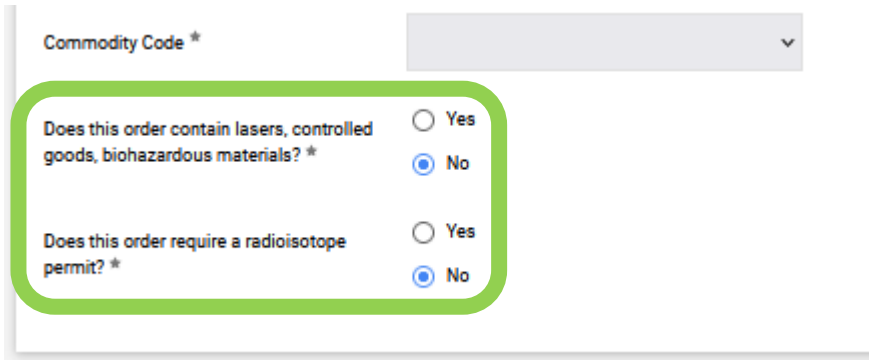
Does this order require a radioisotope permit? *

Yes
 No

Yes
 No

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

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



Commodity Code *

Does this order contain lasers, controlled goods, biohazardous materials? *

Does this order require a radioisotope permit? *

Yes
 No

Yes
 No

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

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

Competitive Bid Requirements

Quotes or Exceptions ★ 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 \$25k: Attach one quote which outlines the order specifics.
 - Greater than \$25k and less than \$75k: Attach 2 quotes from different vendors for comparable products
 - Greater than \$75k and less than \$121,200k: Attach 3 quotes from different vendors for comparable products
 - Equal to or greater than \$121,200k: contact [Procurement Services](#) for a 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.
- 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](#)

5. Select a low, medium or high-risk level from the drop-down the level of potential risk for the procurement.

TIP: For additional information related to evaluating risk, click on the blue **‘planned procurements’** text to visit Procurement Services’ website.

You are required to assess the risk of all planned procurements. What are the risk criteria set out in the Procurement Policy, what is the potential risk level of this procurement?

What is the potential risk level of this procurement? Low

Contract Reference Number and/or Additional Comments

2000 characters remaining [expand](#) [clear](#)

- 6a. Fill in the fields in the **‘Building Ontario Businesses Initiatives Act (BOBIA)’** box.

TIP: Visit Procurement Services’ website for additional information on the Building Ontario Initiative Act (BOBIA).

Building Ontario Businesses Initiative Act (BOBIA)

Under the Building Ontario Businesses Initiative Act (BOBIA), Carleton University is required to give preference to Ontario businesses, in accordance with the regulations (O. Reg. 422/23), when conducting a procurement process for goods and services with a Total Procurement Value under \$121,200.00. Additional information can be found on [Procurement Services website](#)

Is this an Ontario Business, as defined by the Building Ontario Businesses Initiative Act? ★

Yes
 No
 Procurement was completed before April 1, 2024

How did you consider Ontario Businesses in making your purchase decision? ★ Please select...

- 6b. **TIP:** The answer to the **‘Is this an Ontario Business, as defined by the Building Ontario Businesses Initiative Act?’** question may be found in step 3a. Look for the trillium symbol (☸).

Building Ontario Businesses Initiative Act (BOBIA)

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Is this an Ontario Business, as defined by the Building Ontario Businesses Initiative Act? ★

Yes
 No
 Procurement was completed before April 1, 2024

How did you consider Ontario Businesses in making your purchase decision? ★ Please select...

6c. **TIP:** When answering the second question, you can find more information related to the drop-down menu options on Procurement Services’ website.

Building Ontario Businesses Initiative Act (BOBIA)

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Is this an Ontario Business defined by the Building Ontario Businesses Initiative Act?
 Yes
 No
 Procurement was completed before April 1, 2024

How did you consider Ontario Businesses in making your purchase decision? *

Please select...

- Please select...
- Invited only Ontario Businesses to provide (a) quotation(s)
- 10% preferential margin given to Ontario Businesses who provided quotations
- Requisition is a result of Open Competitive procurement
- Exception - goods or services not available from an Ontario Business
- Exception - purchase from a Vendor of Record/Qualified Supplier List/Standing Offer
- Exception - emergency, treasury, legal, commercial sale or resale

Quotes and Supporting

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

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

Quotes and Supporting Documentation

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

Internal Attachments

Add

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

TIP: Click on the **‘recalculate’** icon total’ (the green icon is pointing to the icon) to calculate the total.

Requisition Details

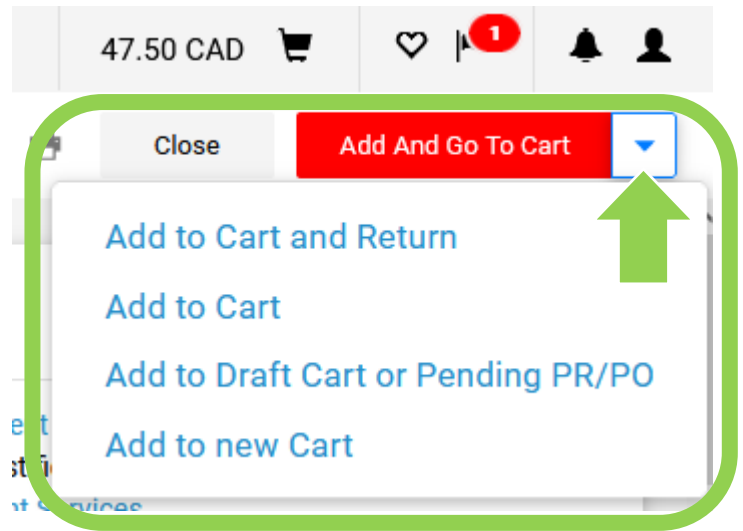
Item Description	Unit Price	Quantity	Ext. Price
<input type="text"/>	<input type="text"/>	<input type="text"/>	0.00
<input type="text"/>	<input type="text"/>	<input type="text"/>	0.00
<input type="text"/>	<input type="text"/>	<input type="text"/>	0.00
<input type="text"/>	<input type="text"/>	<input type="text"/>	0.00
<input type="text"/>	<input type="text"/>	<input type="text"/>	0.00
<input type="text"/>	<input type="text"/>	<input type="text"/>	0.00
<input type="text"/>	<input type="text"/>	<input type="text"/>	0.00
<input type="text"/>	<input type="text"/>	<input type="text"/>	0.00
<input type="text"/>	<input type="text"/>	<input type="text"/>	0.00
Total			0.00

Additional Comments

254 characters remaining expand | clear

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9. Once you have completed the form, click on the red **'Arrow'** button to choose an option from 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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