

**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:**

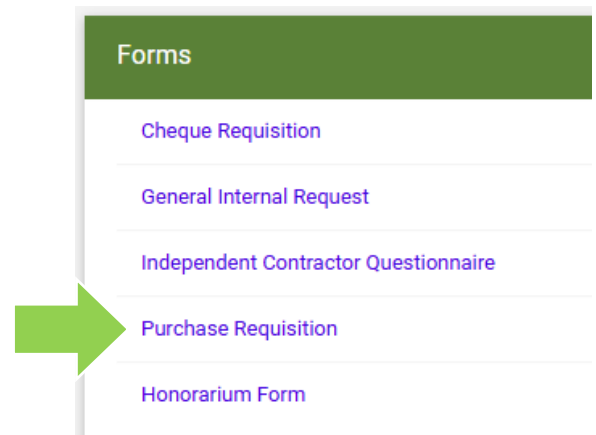
- The Procurement Policy ([available on the University Secretariat's website](#))
- [The 'How to Buy' page on Procurement Services' page](#)

*Last updated June 2, 2025.*


**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 section on the form tells you what the form is for and any important information about filling it out.



**Form Instructions**

Completion of this form is **mandatory** for orders over \$10k, but may be used for any order not found in eShop catalogues. Required fields have an **asterisk (\*)**. 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](#).

**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').

---

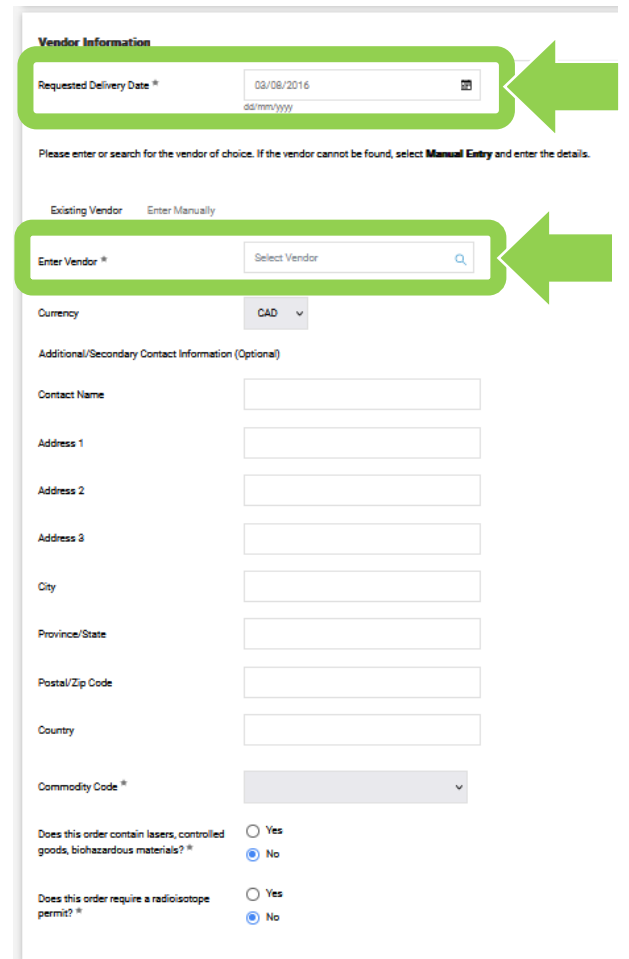
3a. In the 'Vendor Information' box

...


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

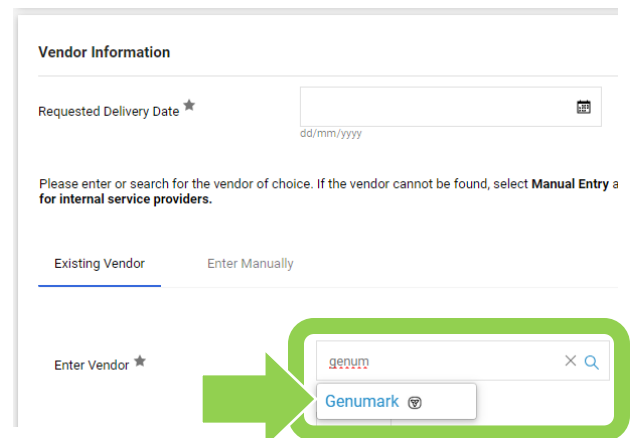
Postal/Zip Code

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.

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 (HTML Body)' field AND enter the information.

The screenshot shows the 'Vendor Information' form. The 'Requested Delivery Date' is set to 03/08/2016. Below this, a message states: '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 selected and highlighted with a green box and a green arrow pointing to it. Below the tabs, the 'Enter Vendor' field contains the text 'unknown company' and a search icon. A 'Try searching again' button is visible below the search field.

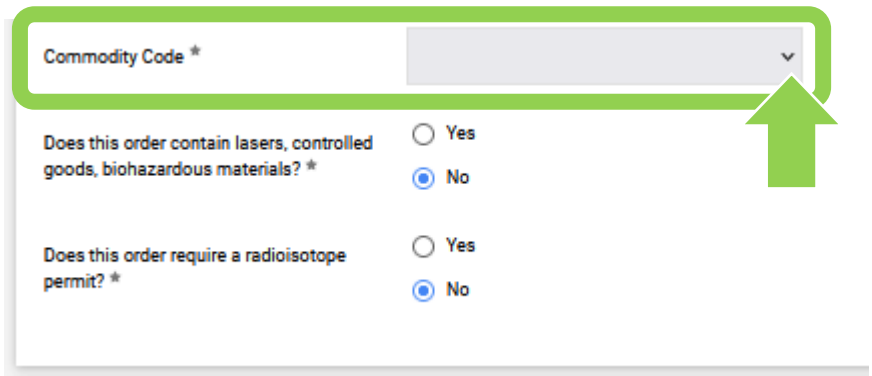
The screenshot shows the 'Vendor Information' form with the 'Enter Manually' tab selected. The 'Vendor Name' field is highlighted with a green box and a green arrow pointing to it, containing the text 'Unknown Company'. Below this are fields for 'Vendor Website', 'Vendor Phone' (with a label '(Country,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

---

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? \*

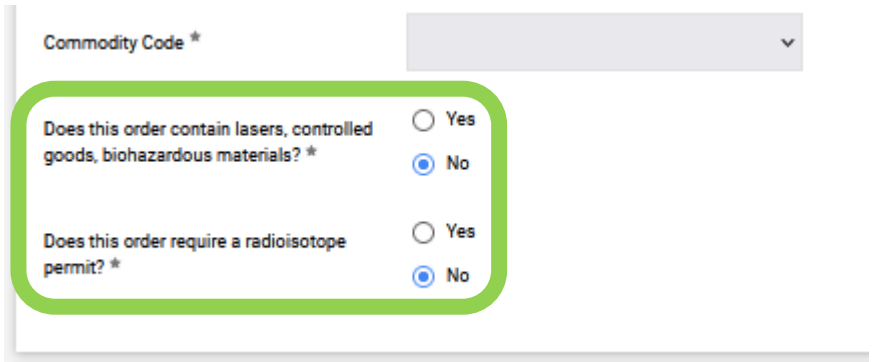
☐ Yes  
☒ No

☐ 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 ▼

1. 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.

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

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**. [Procurement Policy](#), what is the potential risk level of this procurement? ⓘ

What is the potential risk level of this procurement? ▼

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) ⓘ

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... ▼

- 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)



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...

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

- 7a. Fill in the fields in the '**US Procurement Restriction Policy**' box.

**TIP:** Visit Procurement Services' website for additional information on the US Procurement Restriction Policy.

#### U.S. Procurement Restriction Policy



Additional information on the U.S. Procurement Restriction Policy can be found on the [Procurement Services website](#)

Is this a U.S. Business, as defined by the U.S. Procurement Restriction Policy?

☐ Yes

☐ No

☐ Procurement was completed before April 4, 2025

How did you comply with the U.S. Procurement Restriction Policy in making your purchase decision?

If you selected "U.S. Business Justification form attached", please attach a copy of the completed form in the **Quotes and Supporting Documentation** section

- 7b. To determine the answer to question 1, select:
- 'Yes' if your Vendor represented they **are** a U.S. Business using the [Business Representation form](#).
  - 'No' if the Vendor has a globe icon (🌐) in eShop (e.g. step 4a), indicating they have represented their status as a non-US Business.
  - 'No' if your vendor represented they are not a U.S. Business using the [Business Representation form](#).
  - Choose 'Procurement was completed before April 4, 2025' if this is the case.

#### U.S. Procurement Restriction Policy



Additional information on the U.S. Procurement Restriction Policy can be found on the [Procurement Services website](#)

Is this a U.S. Business, as defined by the U.S. Procurement Restriction Policy?

☐ Yes

☐ No

☐ Procurement was completed before April 4, 2025

How did you comply with the U.S. Procurement Restriction Policy in making your purchase decision?

If you selected "U.S. Business Justification form attached", please attach a copy of the completed form in the **Quotes and Supporting Documentation** section

- 7c. To determine the answer to question 2, select ...
- 'Vendor is not a U.S. Business' if you answered 'No' to question 1.
  - '[U.S. Business Justification form attached](#)' if your procurement is a [valid exemption](#), and you are attaching a complete U.S. Business Justification form.
  - 'Requisition is a result of Open Competitive procurement or other current Agreement' when you are using a currently valid eShop Contract Reference Number as your Competitive Bid Requirement.



U.S. Procurement Restriction Policy

Additional information on the U.S. Procurement Restriction Policy can be found on the [Procurement Services website](#)

Is this a U.S. Business, as defined by the U.S. Procurement Restriction Policy?

☐ Yes

☐ No

☐ Procurement was completed before April 4, 2025

How did you comply with the U.S. Procurement Restriction Policy in making your purchase decision?

If you selected 'U.S. Business Justification form attached' in the **Quotes and Supporting Documentation** box, you must attach a completed U.S. Business Justification form.

Vendor is not a U.S. Business

U.S. Business Justification form attached

Requisition is a result of Open Competitive procurement or other current Agreement

8. You must attach all relevant supporting documentation (e.g. quotes), including any required Building Ontario Businesses Initiative Act (BOBIA) or required U.S. Procurement Restriction Policy documentation.

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

Attach all required supporting documentation for your **Competitive Bid Requirements** (ex: quotes or Limited Tendering Justification form) **AND** your **Building Ontario Businesses Initiative Act (BOBIA)** responses (ex: Invitation to Quote Cover Sheet) **AND** any required **U.S. Procurement Restriction Policy** documentation (ex: U.S. Business Justification Form).

Internal Attachments

Add





9. 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       |
| <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       |

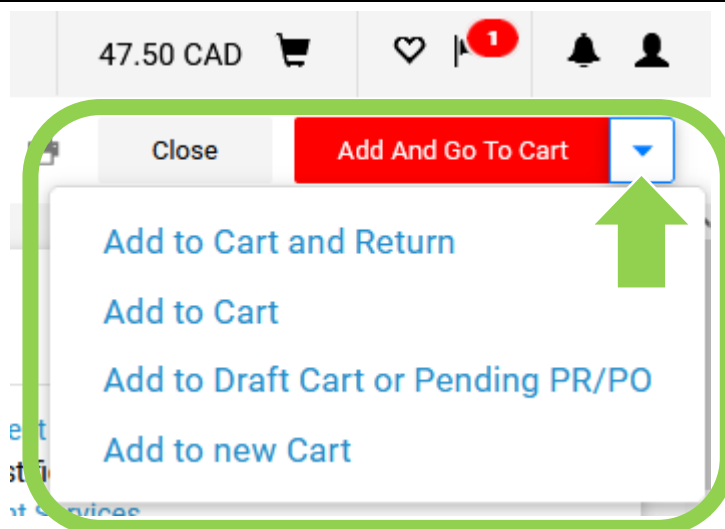
Additional Comments

254 characters remaining

expand | clear

- 
10. 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.



- 
11. **Next, you must check out the cart.** If you need help checking out the cart, refer to the ['Checking out' how-to sheet](#).
- 

**What next?**

- Visit [carleton.ca/facts/eshop](http://carleton.ca/facts/eshop) to find more how-to sheets.
  - Questions about the system? Email [eshop@carleton.ca](mailto:eshop@carleton.ca) or call 613-520-2600 ext.3311.
-