

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:

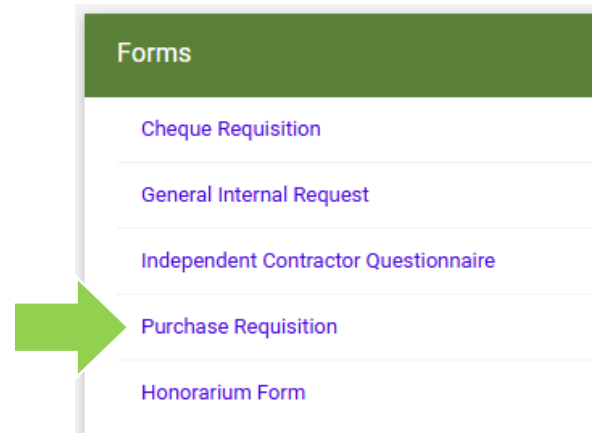
- The Procurement Policy ([available on the University Secretariat's website](#))
- [The 'How to Buy' page on Procurement Services' page](#)

Last updated February 25, 2026.

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

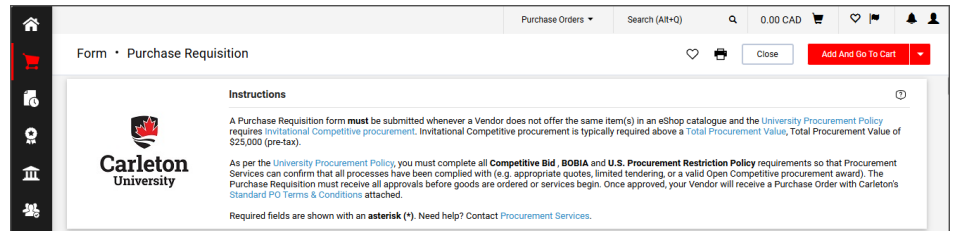
1. Once logged into eShop, scroll down to the **'Forms'** box on the landing page.

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



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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 'Close' button in the upper right-hand corner of the screen.



Purchase Orders ▾ Search (Alt+Q) 0.00 CAD

Form - Purchase Requisition Close Add And Go To Cart

Instructions

 **Carleton University**

A Purchase Requisition form **must** be submitted whenever a Vendor does not offer the same item(s) in an eShop catalogue and the [University Procurement Policy](#) requires [Invitational Competitive procurement](#). Invitational Competitive procurement is typically required above a [Total Procurement Value, Total Procurement Value of \\$25,000 \(pre-tax\)](#).

As per the [University Procurement Policy](#), you must complete all [Competitive Bid, BOBIA](#) and [U.S. Procurement Restriction Policy](#) requirements so that Procurement Services can confirm that all processes have been complied with (e.g. appropriate quotes, limited tendering, or a valid Open Competitive procurement award). The Purchase Requisition must receive all approvals before goods are ordered or services begin. Once approved, your Vendor will receive a Purchase Order with Carleton's [Standard PO Terms & Conditions](#) attached.

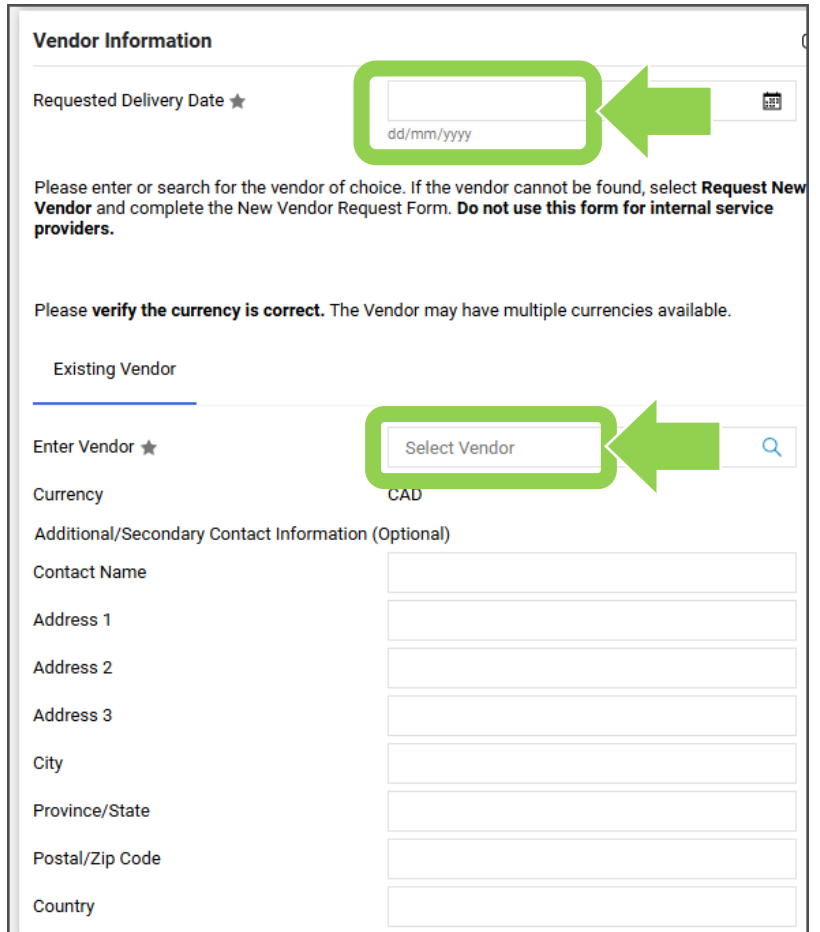
Required fields are shown with an **asterisk (*)**. Need help? Contact [Procurement Services](#).

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.




Vendor Information

Requested Delivery Date ★ 

Please enter or search for the vendor of choice. If the vendor cannot be found, select **Request New Vendor** and complete the New Vendor Request Form. **Do not use this form for internal service providers.**

Please **verify the currency is correct.** The Vendor may have multiple currencies available.

Existing Vendor

Enter Vendor ★ 

Currency CAD

Additional/Secondary Contact Information (Optional)

Contact Name

Address 1

Address 2

Address 3

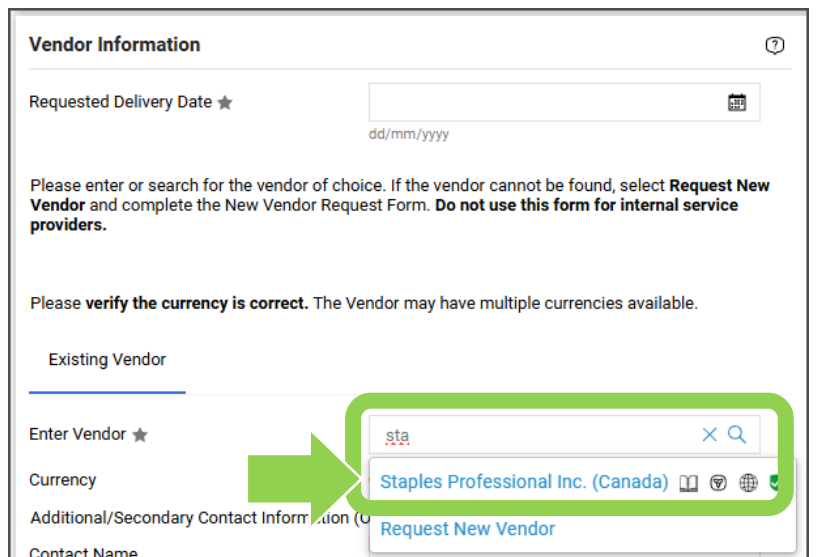
City


Province/State


Postal/Zip Code

Country

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 ★ 

Please enter or search for the vendor of choice. If the vendor cannot be found, select **Request New Vendor** and complete the New Vendor Request Form. **Do not use this form for internal service providers.**

Please **verify the currency is correct.** The Vendor may have multiple currencies available.





Existing Vendor

Enter Vendor ★ 

Currency 

Additional/Secondary Contact Information (Optional)

Contact Name

- Staples Professional Inc. (Canada)    
- Request New Vendor

3b. In the 'Vendor Information' box

...

If no result are returned ...

Click the 'Enter Manually' tab.

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

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

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

Vendor Name *

Vendor Website

Vendor Phone
(Country, Area, Phone, Ext)

Vendor Fax No.
(Country, Area, Phone)

Vendor Email

Currency

Distribution Method *
This information will be used by Accounts Payable and Purchasing Services to contact the vendor, if needed.

Choose the preferred method (Required)

Fax

Email (HTML Body)

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.

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 Please select...

- 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 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.

5. 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

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

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) ⓘ

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? ★

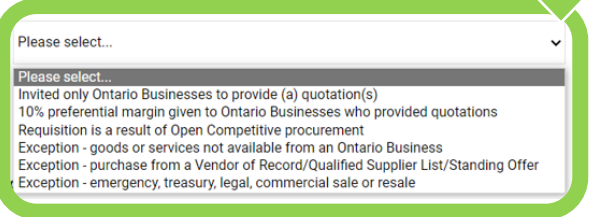


Yes
 No
 Procurement was completed before April 1, 2024

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

Please select...

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 Support



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? ★

Please select...

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 the first question, 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.

A screenshot of the 'U.S. Procurement Restriction Policy' form. The form title is 'U.S. Procurement Restriction Policy'. Below the title, there is a link: 'Additional information on the U.S. Procurement Restriction Policy can be found on the Procurement Services website'. The main question is 'Is this a U.S. Business, as defined by the U.S. Procurement Restriction Policy? ★'. There are three radio button options: 'Yes', 'No', and 'Procurement was completed before April 4, 2025'. Below this is another question: 'How did you comply with the U.S. Procurement Restriction Policy in making your purchase decision? ★'. There is a dropdown menu with 'Please select...' and a downward arrow. At the bottom, there is a note: '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 the second question, 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.

A screenshot of the 'U.S. Procurement Restriction Policy' form, similar to the one above. The dropdown menu for the second question is open, showing three options: 'Please select...', 'Vendor is not a U.S. Business', and 'U.S. Business Justification form attached'. A green arrow points down to the dropdown menu, and a green rounded rectangle highlights the dropdown menu area. The text 'Requisition is a result of Open Competitive procurement or other current Agreement' is visible at the bottom of the form.

8. Provide an answer for each of the fields and radio boxes in the 'Risk Assessment' section.

Risk Assessment

If you answered "yes" to any of the Risk Assessment questions, you may be contacted by Procurement Services to discuss your purchase.

Please provide a brief description of your purchase

1000 characters remaining [expand](#) | [clear](#)

Has your Vendor included their own Terms and Conditions (eg: Customer Agreement, Service Agreement)?

Yes
 No

Would failure of the goods/services cause reputational or financial damage, injury, or loss of life?

Yes
 No

Will the Vendor send staff to campus to do any work (eg: installation, maintenance, calibration)?

Yes
 No

NOTE: This question does not apply to Vendors simply attending meetings on campus.

Will your Vendor or other 3rd-parties need access to the University's technological infrastructure?

Yes
 No

If you answered yes to the question above, please describe.

1000 characters remaining [expand](#) | [clear](#)

Will your Vendor or other 3rd-parties require integration with University systems (eg: Banner)?

Yes
 No

If you answered yes to the question above, please describe.

1000 characters remaining [expand](#) | [clear](#)

Does your purchase include a Warranty?

Yes
 No

If you answered yes to the question above, what is the length of the warranty in years?

1000 characters remaining [expand](#) | [clear](#)

9. Provide an answer for each of the questions in the 'Goods' section.

Goods

Goods can carry a variety of risks which must be properly assessed by key campus stakeholders. Completing the below questions will support facilitation of the review process before your requisition can be approved. **Before submitting**, read and understand our health & safety [Protocols and Considerations](#) page.

Does your purchase requisition include any physical goods?

Yes
 No

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

Yes
 No

Does this order require a radioisotope permit? *

Yes
 No

10. Provide an answer for each of the fields and radio boxes in the **'Software'** section.

Software ?

Software of any kind (e.g. licensing agreements, access to a web-based platform, programs installed on your computer to run or receive reports from equipment) may require additional risk mitigation and inclusion of key campus stakeholders. Completing the below questions will support facilitation of the review process before your requisition can be approved. Before submitting, contact the [Information Technology Services \(ITS\) Service Desk](#) to determine if a comparable software or cloud application is already available to the campus community.

Does your purchase requisition include any software or access to an online app/web portal? Yes No

Will you share/transmit University data (including research/student data) via 3rd-parties/cloud Yes No

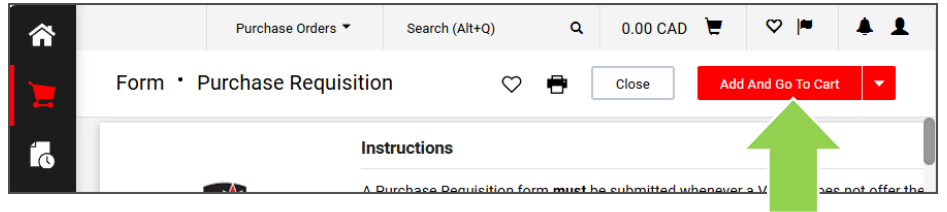
If yes, have you initiated a [Data Protection Risk Assessment](#) and please describe the status of it's process.

1000 characters remaining [expand](#) | [clear](#)

Will your purchase facilitate acceptance of credit/debit payments by or on behalf of the University? Yes No

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12. Once you have completed the form, click on the **'Add And Go To Cart'** button.

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



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