



PREPARING REQUISITION FORM

QUICK REFERENCE GUIDE

Last revised: May 31st 2016

Related Document: *SOPs*

- Processing Low Value Purchase Requisitions
- Processing BioBar Requisitions
- Processing High Value Purchase Requisition

PREPARING THE PURCHASE REQUISITION



Step A – Download and fill the appropriate Purchase Requisition Form:

1. Download the appropriate form [here](#):

- The LVPO Form for Low value Purchases (< \$5,000 before tax) and BioBar Purchases
- The HVPR form for High value Purchases (>= \$5,000 before tax)

Note: the forms are fillable pdf.

2. Fill the mandatory information:

a) Supplier Information:

TO (supplier - name, address, postal code)

Phone:
Fax:

b) University Information :

SHIP TO:	University of Guelph
CAMPUS:	GUELPH
BLDG/RM #:	
DEPT:	
STREET:	
CITY/PROV:	
ATTN:	
PHONE/EXT:	

c) Requisition Date:

Requisition Date
YYYY - MM - DD

d) Items Information:

Item #	Qty Ordered	Qty Received	Unit	Part No., Code, Description etc.	Price / Unit	Amount
						\$ 0.00

e) Specify is this order is for Tri-Council and if this is an import order:

For Tri - Council? <input type="radio"/> Y <input type="radio"/> N - If yes, the grant leader or an authorized delegate must authorize this order
Import Order? <input type="radio"/> Y <input type="radio"/> N - If yes, a copy of this order must be emailed to customs@uoguelph.ca prior to shipping

f) Add the tax percentage depending on the applicable taxes. The subtotal and total will be auto-calculated :

SUBTOTAL	\$ 10.00
Tax	15.00%
TOTAL	\$ 11.50

g) Select Currency

Currency	CAD
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PREPARING THE PURCHASE REQUISITION



Step B- Obtain department coding and Designate Authority* approval

1. The Designate Authority must fill the following fields of the form:

- Grant Coding

Item #	Quantity	Fund	Unit	Grant	Project	Object	Amount

- “Authorized By” box (this must be a physical signature):

AUTHORIZED BY

Signature
Print Name

* This is the person that is authorized to purchase on the funding source.

Step C – In case of High Value Purchase Order:

1. Gather the required Quotes based on the following (for non-consulting goods):

- When the total order value is in the range of \$5,000 to \$25,000 (excluding \$25,000) a minimum of two written quotes are required.
- When the total order value is in the range of \$25,000 to \$100,000 (excluding \$100,000) three written quotes through an invitational competitive procurement are required
- When the total order value is \$100,000 and above, there must be an open competitive procurement made through an electronic tendering system.
- Where the order value is \$5,000 or above and only one vendor can offer the requested good or service, the requester must fill a Single Source Form

2. Gather the required Approvals based on the following:

- In case of Single Source (for orders of \$5,000 and above) the appropriate signatures must be provided at the end of the form, including approval from Assistant Manager, Purchasing Services

CREATING A PURCHASE REQUISITION TICKET IN FOOTPRINTS



Step A - Open a FootPrints ticket via the Online Request Form [here](#). (Using Google Chrome is recommended)

1. Fill the following mandatory fields:
 - a) Provide your information
 - b) Select the type of request:
 - Low Value Purchase Requisition where the total value of the purchase is below \$5,000 before tax
 - High Value Purchase Requisition where the total value of the purchase is equal to or above \$5,000 before tax
 - BioBar Purchase Requisition where you need to make a purchase from the BioBar.
 - If applicable, follow the on-screen prompts
 - c) A meaningful title and description with any necessary details to help the Financial Clerk to understand potential specificities for this purchase
 - d) Attach the completed Purchase Requisition form, as well as the quotes and additional approvals in case of High Value Purchase Requisition
 - e) Click on “Submit”

A screenshot of the FootPrints online request form. The form is titled 'Contact Details (Primary Contact Person)'. It has several fields: 'Email Address', 'First Name', and 'Last Name' (grouped in a red box labeled 'a'); 'Request' (a dropdown menu labeled 'b'); 'Title' and 'Additional Comments' (grouped in a red box labeled 'c'); 'Attachment 1' (a large grey area with the text 'Drop files or click here to upload' labeled 'd'); and a 'Submit' button (labeled 'e').

Step B – For BioBar only:

1. Receive the BioBar Purchase Requisition form approved by email
2. Print the form twice:
 - a) Give one copy of the form to BioBar
 - b) Sign the “Received by” box of the other copy, scan it and send it back to the Financial Clerk.

A rectangular box labeled 'RECEIVED BY' at the top. It contains two horizontal lines for a signature and a print name.

Important: Be careful to send the signed form by responding to the FootPrints email, to ensure that the form will be attached to the related FootPrints ticket.

CONTACT INFORMATION



For general enquiries on the purchasing process, contact the Operations Manager for assistance:

Sally Maclachlan
smaclach@uoguelph.ca
519-824-4120 x54767

For queries on how to complete the Purchase Requisition Form, contact the Financial Clerks for assistance:

	Contact Details
General Enquiries	ovcsas@uoguelph.ca OVCE Rm: 2631

Note: Refer to :

- Low Value Purchase Order [here](#)
- Purchasing Policy [here](#) for any further details