

Purchase Requisition Form

A Purchase Requisition is completed to initiate the purchase of goods or services from external Suppliers. A web version of the Purchase Requisition form (editable PDF format) is available on the Supply Management Services website at www.sms.ualberta.ca in the Forms Cabinet. Purchase Requisitions may also be keyed directly into PeopleSoft using an on-line requisitioning process by authorized users.

First-time set up of the Purchase Requisition

“Editable PDF” forms require Adobe Reader version 8 to function properly.

For additional help refer to the document [Using and Troubleshooting Adobe Reader](#)

Procedures for completing a Purchase Requisition

The following list details the different fields on the Purchase Requisition. An authorized representative in Supply Operations will complete the shaded fields on the Purchase Requisition form. Those items that appear shaded in the list below are optional fields.

PLEASE CLICK ON THE YELLOW “GENERATE REQUISITION NUMBER” BUTTON TO START YOUR REQUISITION.

| Field | Requirements |
|-----------------------|--|
| Requisition Number | The requisition number is automatically generated when you click on the Generate Requisition Number button on the top of the form. |
| Department Reference | Optional. This field can be used for departments that prefer to create their own unique numbers for tracking requisitions. |
| Date | This date will automatically populate with the current date. You may change the date by clicking on the arrow at the right. |
| Vendor Code | Optional. This is a PeopleSoft Vendor ID number which may be included if it is known. |
| Suggested Supplier(s) | Provide the complete Supplier name, mailing address including postal code / zip code if possible. If requesting a quotation please include the name(s) of suggested suppliers (if known). |
| Phone Number | Please include the phone number of the supplier if it is known. |
| Fax Number | Please include the fax number of the supplier if it is known. |
| Deliver To | Please provide the Department Name, Room & Bldg and the name of the Individual ordering the goods or services. This address is used for delivery of goods and also for mailing invoice copies related to the resulting Purchase Order. |
| Bid Required | Optional. Please select this box if you are requesting quotations. NOTE: Goods or Services that exceed the competitive bid thresholds will automatically be issued for bid in accordance with University procedure. |

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| Delivery Date Required | Optional. Indicate the date materials or services are required. |
| Attachment | Optional. If there are associated documents please select this box and indicate the number of pages attached. Attach any additional information or documentation to the Purchase Requisition. Please ensure that the attachments are cross referenced or stapled to the Purchase Requisition. |
| GST Code | Departments are responsible for assigning the correct GST code. Please select a GST code from the drop down field. |
| Quantity | Provide the order quantity required. Please ensure that if you are ordering material it corresponds with the package sizes and pricing. |
| Unit of Measure | You may select from a drop down list or key appropriate information. |
| Catalog Number / Description | Provide complete description(s) with corresponding Supplier catalogue number(s) if applicable to fully identify the requirements. Attached documents may be used. |
| Unit Price | Enter the Unit price if known (GST excluded). Include an estimated price if an actual price is not known. Note: The Extended Price and Total Value on the Purchase Requisition will calculate automatically based on the quantity entered and unit price. |
| Speed Code and Account | Please complete both fields for the charges related to the request. Use the Account chartfield value that most accurately describes the item being acquired. Enter split distribution details if required. |
| Permits and Licenses | Domestic Shipments: Controlled and Restricted substances (i.e. alcohols, narcotics, radioisotopes) require a License/Certificate prior to placing an order from a Canadian supplier. Select either: License/Exemption Attached OR License Not Required USA/International shipments: Certain Biological, Chemical or Agricultural goods require an import permit prior to placing an order from a foreign supplier. Select either: Import Permit Attached OR Import Permit Not Required For further information, contact the Customs Division at 492-3435 |
| Contact Information | Provide the name of a contact person, department name and phone number in the event there are questions or issues related to the form or purchase. |
| Authorization | The printed name and signature of the Account holder or Delegate is required prior to submitting to Supply Management Services. |

Use the buttons on the bottom of form to Print, Clear Form and Generate a New Requisition or Save your Purchase Requisition.

The Authorizing Signatures and Printed Name must be applied to the printed copy of the Purchase Requisition and forwarded to Supply Management Services (SMS), 3rd Floor Materials Management Building. Purchase Requisitions may also be sent by fax to 492-0607. If you are sending your requisition via fax, **do not** send the original in the mail. This may result in a duplication of Purchase Orders.