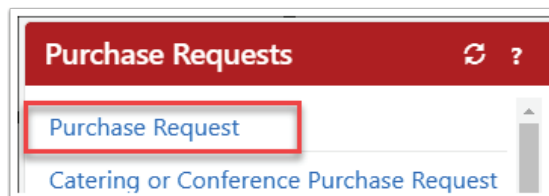


1. Purchase Request

To request an RFP or competitive bid, go to the UShop home shopping page. Click on the **Purchase Request Form**.

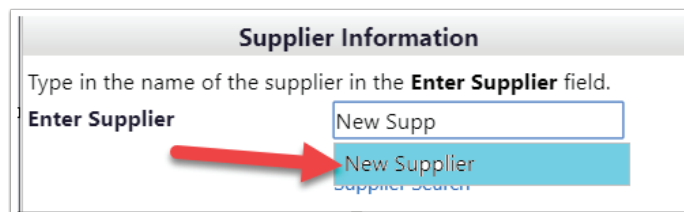


The screenshot shows a red header bar with the text "Purchase Requests" and a refresh icon. Below the header, there is a list of options: "Purchase Request" (highlighted with a red box) and "Catering or Conference Purchase Request".

2. Supplier Information

Since the awarded supplier is not yet determined, in the field to the right of **Enter Supplier** start typing the words *New Supplier*. As you do so, the system will generate a prompt for *New Supplier* below the field.

Click on this prompt to populate the field.



The screenshot shows a form titled "Supplier Information". It contains a text input field with the placeholder text "Type in the name of the supplier in the **Enter Supplier** field." Below the input field, there is a dropdown menu with the text "Enter Supplier" and a list of suggestions: "New Supp", "New Supplier", and "Supplier Search". A red arrow points to the "New Supplier" suggestion.

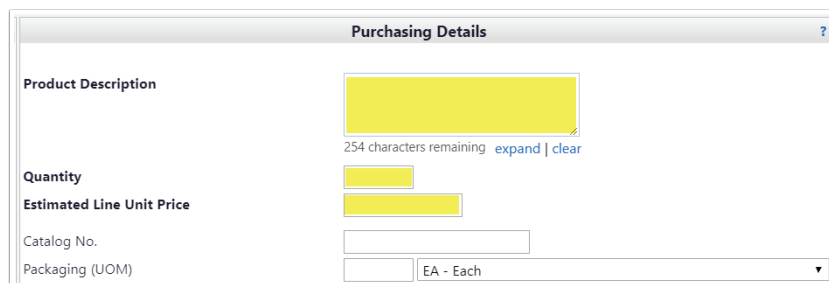
The Purchasing Buyer will add the awarded supplier's name after the bid process is complete.

3. New Supplier Details and Contract Details

Since the supplier is not yet determined and the contract is not yet in place, neither **New Supplier Details** nor the **Contract Details** are required at this time.

4. Purchasing Details

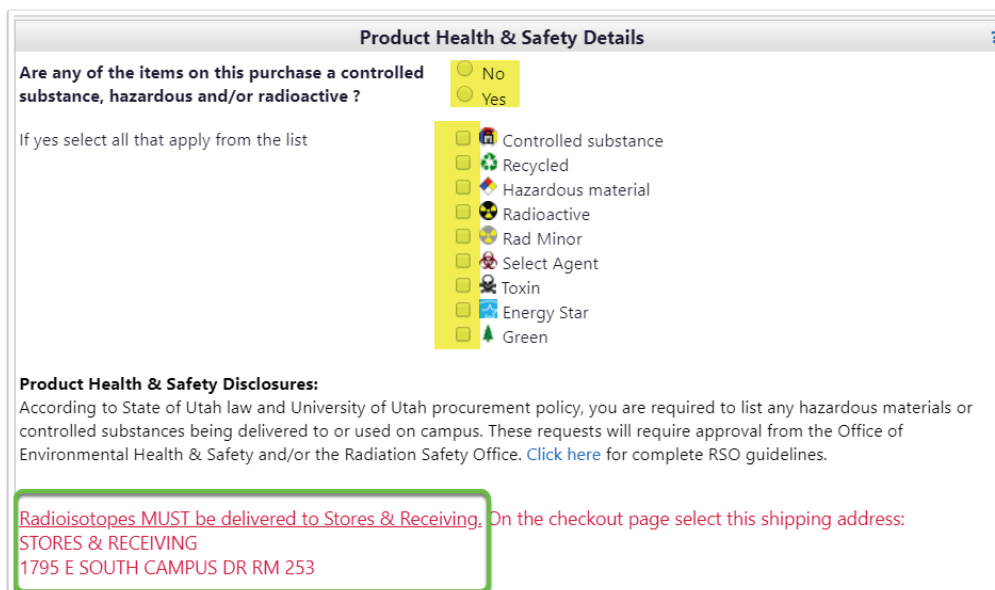
Only the fields with bolded headings are required. Complete the **Product Description**, **Quantity** and **Estimated Line Unit Price**.



The screenshot shows a form titled "Purchasing Details". It contains several fields: "Product Description" (a large text area), "Quantity" (a text input field), "Estimated Line Unit Price" (a text input field), "Catalog No." (a text input field), and "Packaging (UOM)" (a dropdown menu with "EA - Each" selected). There is also a "254 characters remaining" indicator and "expand | clear" links.

5. Product Health & Safety Details

Indicate whether this order will include items with Health & Safety concerns. If Yes check any applicable items so the order will be routed for needed approvals. Note that all Radioisotopes **MUST** be delivered to Stores & Receiving.



The screenshot shows a form titled "Product Health & Safety Details". It contains a question: "Are any of the items on this purchase a controlled substance, hazardous and/or radioactive?" with "No" and "Yes" radio buttons. Below the question, there is a list of checkboxes for various categories: "Controlled substance", "Recycled", "Hazardous material", "Radioactive", "Rad Minor", "Select Agent", "Toxin", "Energy Star", and "Green". A green box highlights the "Radioisotopes MUST be delivered to Stores & Receiving. On the checkout page select this shipping address: STORES & RECEIVING 1795 E SOUTH CAMPUS DR RM 253" text.

6. Purchasing Department Details

Click the Yes button, indicating that an RFP or Bid is requested.

In the text box, you may provide the Purchasing Department with instructions or information such as bid specifications or the names of suppliers to invite.

Or, you may direct Purchasing to attached documets containing this information.

Purchasing Department Details?

Does this order require a bid, sole source approval, or additional review by the Purchasing Dept?

No

Yes

Bid Request and Sole Source Info: Purchases greater than \$5,000 may require a competitive bid by the Purchasing Department unless the goods or services are being provided by a contracted University supplier, or Sole Source justification is provided. Contact the Purchasing Dept. with any questions.

• Orders requiring a competitive bid or sole source approval *should not* be combined with other orders in a cart.

Provide instructions or notes for Purchasing.

1000 characters remaining

expand | clear

Note: If this is a Sole Source request, you must fill out and attach the **Sole Source Request Form**. If this is a competitive bid request, please attach the bid specifications. These and other relevant attachments should be added as Internal Attachments in the **Attachment Details** section.

7. Attachment Details

Bid/ RFP specifications and supplier contact information should be attached as **Internal Attachments**.

This will allow the Purchasing Buyer to view the documents needed to conduct the bid process

Attachment Details?

Internal Attachments are viewable only within UShop and are not sent to the supplier.

Internal Attachments

Add Attachments

SizeDate

External Attachments All External Attachments will be sent with the PO to the supplier.

External Attachments

Add Attachments

SizeDate

8. Add and go to cart

When you have completed the form, select **Add and go to cart** under the **Available Actions** drop down, and click **Go**.

Available Actions:

Add and go to Cart

Go

Close

9. Complete transaction

Complete the transaction as with any UShop order. **Submit Requisition** or **Assign Cart** to a requisitioner.

This will send the order through workflow to a Purchasing Buyer who will conduct the RFP/Bid process.

Submit Requisition

Assign Cart