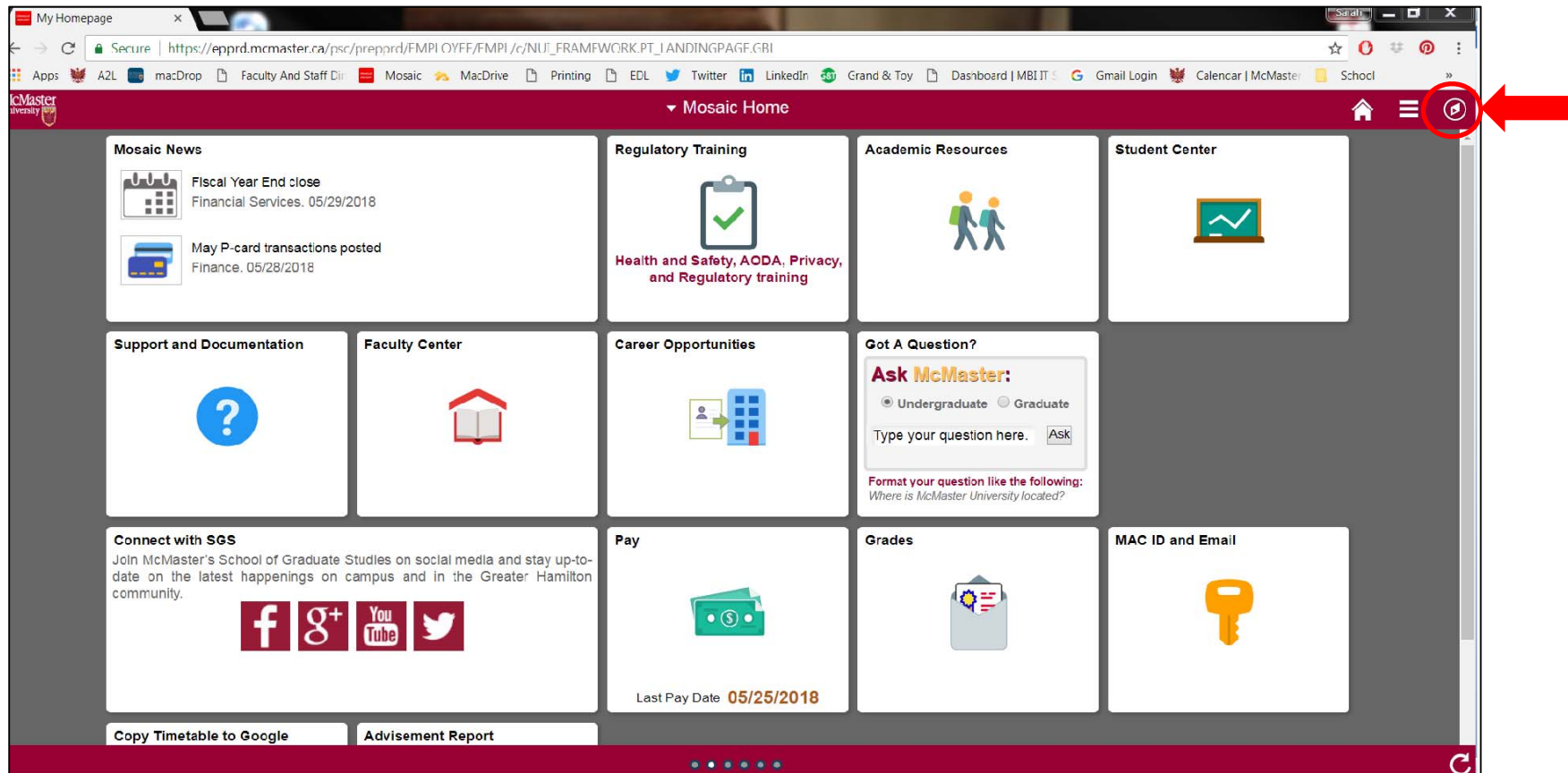


# How to Enter a Purchase Requisition

1. Login to MOSAIC
2. Select the NavBar Icon at the top of the screen



### 3. Select 'Navigator', then 'Finance'

The screenshot shows the McMaster University Mosaic Home page. The page layout includes a top navigation bar with the McMaster University logo and a 'Mosaic Home' title. Below this, there are several content blocks: 'Mosaic News' with two items, 'Regulatory Training' with a clipboard icon, 'Academic Resources' with a group of people icon, 'Support and Documentation' with a question mark icon, 'Faculty Center' with a book icon, 'Career Opportunities' with a person and building icon, 'Got A Question? Ask McMaster' with a search bar, 'Connect with SGS' with social media icons, 'Pay' with a money icon, and 'Grades' with a document icon. On the right side, there is a 'NavBar: Navigator' sidebar. This sidebar contains a 'Recent Places' section with a clock icon, a 'Navigator' section with a document icon, an 'Edit Favorites' section with a pencil icon, a 'Favorites' section with a star icon, and a 'MAC ID and Password' section with a key icon. A red arrow points from the 'Navigator' icon in the sidebar to the 'Finance' link in the list of options. Another red arrow points from the 'Finance' link to the 'Finance' link in the list of options.

My Homepage x

Secure | [https://epprd.mcmaster.ca/psc/preprd/FMPL/OYFF/FMPL/c/NUJL\\_FRAMEWORK\\_PT\\_1\\_ANDINGPAGE.GRI](https://epprd.mcmaster.ca/psc/preprd/FMPL/OYFF/FMPL/c/NUJL_FRAMEWORK_PT_1_ANDINGPAGE.GRI)

Apps A2L macDrop Faculty And Staff Dir Mosaic MacDrive Printing EDL Twitter LinkedIn Grand & Loy Dashboard | MBI | Gmail Login Calendar | McMaster School

McMaster University

▼ Mosaic Home

**Mosaic News**

Fiscal Year End close  
Financial Services. 05/29/2018

May P-card transactions posted  
Finance. 05/28/2018

**Regulatory Training**

Health and Safety, AODA, Privacy, and Regulatory training

**Academic Resources**

**Support and Documentation**

**Faculty Center**

**Career Opportunities**

**Got A Question? Ask McMaster:**

Undergraduate Graduate

Type your question here. Ask

Format your question like the following:  
Where is McMaster University located?

**Connect with SGS**

Join McMaster's School of Graduate Studies on social media and stay up-to-date on the latest happenings on campus and in the Greater Hamilton community.

f g+ YouTube Twitter

**Pay**

Last Pay Date 05/25/2018

**Grades**

**NavBar: Navigator**

Recent Places

Navigator

Edit Favorites

Favorites

MAC ID and Password

Campus Solutions >

Finance >

Human Resources >

Email Management >

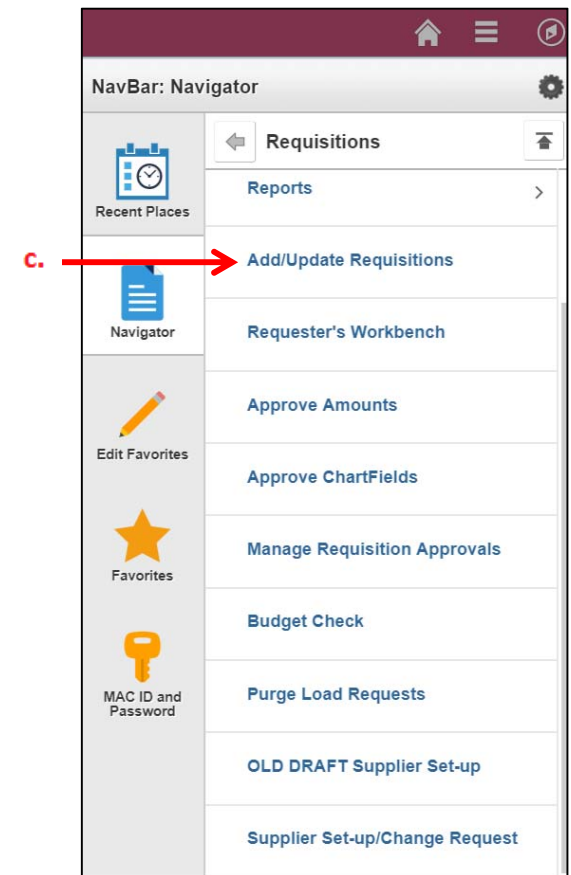
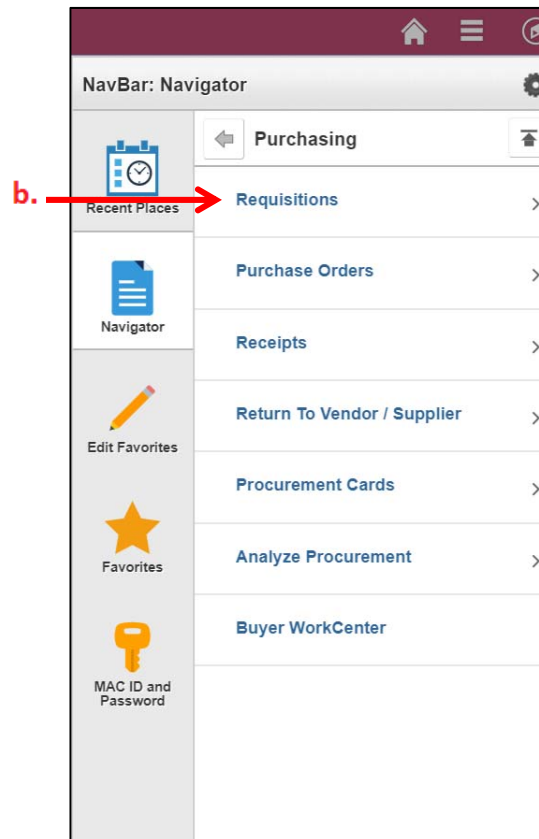
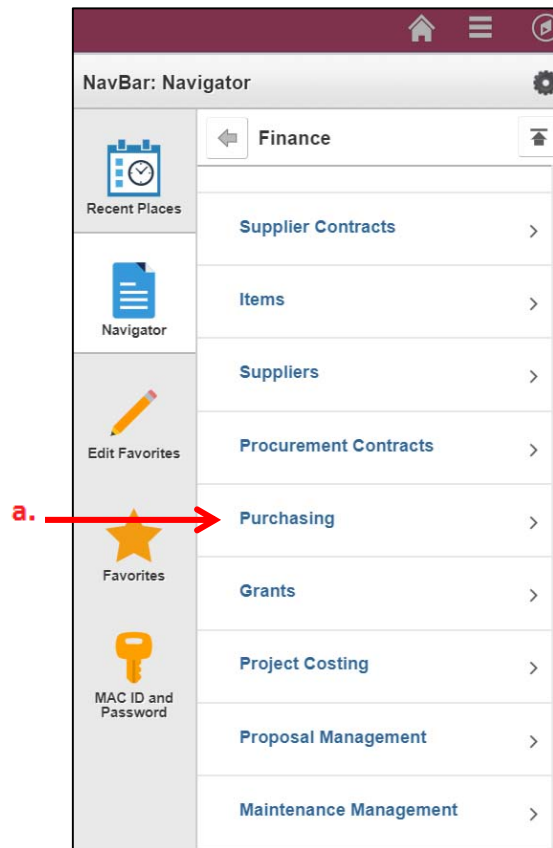
MAC ID Management >

My Preferences

Copy Timetable to Google

Advisement Report

4. Start a Requisition, by selecting:
- a. Purchasing
  - b. Requisition
  - c. Add/Update Requisition



5. Click on the **Add a New Value** tab and select **Add**.

*You would select **Find an Existing Value** if you wanted to look up a requisition you entered previously.*

The screenshot shows the McMaster University Mosaic web application. The 'Requisitions' section has two tabs: 'Find an Existing Value' and 'Add a New Value'. The 'Add a New Value' tab is active. Below the tabs, there are input fields for 'Business Unit' (set to MAC01) and 'Requisition ID' (set to NEXT). A red arrow points to the 'Add' button, which is labeled 'Step 5.' There is also an 'Add (Alt+1)' button below it.

6. Modify the information in the Header. Modify by clicking on magnifying glass next to each field. **Requisition Date** defaults to today's date. **Accounting Date** defaults to today's period.
- Origin**- Defaults to ONL. Will need to be changed to RSCH for Research accounts or CAP for Capital accounts (Facilities) where required.
  - Currency**- defaults to Canadian. Need to change for other currencies.

The screenshot shows the 'Requisition' form. The 'Header' section is expanded. It contains fields for 'Business Unit' (MAC01), 'Requisition ID' (NEXT), 'Requisition Name' (with a 'Copy From' button), 'Status' (Open), 'Budget Status' (Not Chk'd), and a checkbox for 'Hold From Further Processing'. Below these are fields for '\*Requester', '\*Requisition Date' (06/06/2018), 'Origin' (ONL), '\*Currency Code' (CAD), and 'Accounting Date' (06/06/2018). Red arrows point to the 'Origin' and '\*Currency Code' fields, labeled 'Step 6 a.' and 'Step 6 b.' respectively. There are also links for 'Requester Info', 'Operating', 'Dollar', 'Requisition Defaults', 'Requisition Activities', and 'Add Comments'. At the bottom right, there is an 'Amount Summary' section with a table showing 'Merchandise Amount', 'Tax', and 'Total Amount' all set to 0.00 CAD, with a 'Recalc Gross' button.

Amount Summary		
Merchandise Amount	0.00	CAD
Tax	0.00	CAD
Total Amount	0.00	CAD

7. Now enter the Line item description on the Details line. *All Line Information*

- Item**- leave this field empty. *(Dead Field- does not show on PO)*
- Description**- type a description of the item you are purchasing. If the supplier has provided an item number begin the description with the supplier's item number.
- Quantity**- this is the number you are purchasing. **For Blanket Purchase orders enter the total quantity for the period the blanket PO covers. For example- qty 1,000 (10 releases x 100 units = 1,000 qty)**
- UOM** - unit of measure. Most requisitions will have EA (each) as UOM. Click on magnifying glass to view other options.
- Category** - click on magnifying glass to view options available. **This is category of goods or services you are buying, not your department.**  
*Example- lab supplies such as beakers should be 4110000 Laboratory & Scientific Equipment, not Research Services.*
- Price**- remember to enter the price without taxes. PeopleSoft calculates the taxes for you.

**Maintain Requisitions**

**Requisition**

Business Unit MAC01      Status Open ☒

Requisition ID NEXT      Budget Status Not Chk'd

Requisition Name  Copy From ☐ Hold From Further Processing

**Header** ?

\*Requester  Requester Info

\*Requisition Date 06/06/2018

Origin ONL Operating

\*Currency Code CAD Dollar

Accounting Date 06/06/2018

Requisition Defaults      Add Comments

Requisition Activities

**Amount Summary** ?

Merchandise Amount 0.00 CAD

Tax 0.00 CAD Recalc Gross

Total Amount 0.00 CAD

**Add Items From** ?

Purchasing Kit      Catalog

Item Search      Requester Items

**Line** ?

Details      Ship To/Due Date      Status      Supplier Information      Item Information      Attributes      Contract      Sourcing Controls

Line	Item	Description	Quantity	*UOM	Category	Price	Merchandise Amount	Status
1			0.0000			0	0.00	Open

View Printable Version      View Approvals      \*Go to ...More...

Save      Notify      Refresh      Add

8. **OPTIONAL:** To add additional lines hit the **+** button at the end of the line. / To remove lines hit the **-** button at the end of the line.

Maintain Requisitions

### Requisition

Business Unit: MAC01      Status: Open ☒

Requisition ID: NEXT      Budget Status: Not Chk'd

Requisition Name:  Copy From ☐ Hold From Further Processing

**Header** ?

\*Requester:  Requester Info

\*Requisition Date: 06/06/2018      Origin: ONL      Operating

\*Currency Code: CAD      Dollar

Accounting Date: 06/06/2018

Requisition Defaults      Add Comments

Requisition Activities

**Amount Summary** ?

Merchandise Amount	0.00	CAD
Tax	0.00	CAD
Total Amount	0.00	CAD

Recalc Gross

**Add Items From** ?

Purchasing Kit      Catalog

Item Search      Requester Items

**Line** ?

Personalize | Find | View All | First 1 of 1 | Last

Details	Ship To/Due Date	Status	Supplier Information	Item Information	Attributes	Contract	Sourcing Controls					
Line	Item	Description	Quantity	*UOM	Category	Price	Merchandise Amount	Status				
1	<input type="text"/>	<input type="text"/>	0.0000	<input type="text"/>	<input type="text"/>	<input type="text"/>	0.00	Open				

View Printable Version      View Approvals      \*Go to ...More...

Save      Notify      Refresh      Add


*Add additional line* (pointing to + button)

*Remove line* (pointing to - button)






9. Click on the **Schedule** icon at the end of the line.

Maintain Requisitions

### Requisition

Business Unit MAC01      Status Open   
Requisition ID NEXT      Budget Status Not Chk'd  
Requisition Name  Copy From ☐ Hold From Further Processing

▼ Header ?

\*Requester    
\*Requisition Date 06/06/2018  Requester Info  
Origin ONL  Operating  
\*Currency Code CAD  Dollar  
Accounting Date 06/06/2018 

Requisition Defaults      Add Comments  
Requisition Activities



Amount Summary ?











Merchandise Amount	0.00 CAD	
Tax	0.00 CAD	Recalc Gross
Total Amount	0.00 CAD	

Add Items From ?

Purchasing Kit      Catalog  
Item Search      Requester Items

Line ?

Personalize | Find | View All |   First 1 of 1 Last

Details	Ship To/Due Date	Status	Supplier Information	Item Information	Attributes	Contract	Sourcing Controls							
Line	Item	Description	Quantity	*UOM	Category	Price	Merchandise Amount	Status						
1				0.0000			0	0.00	Open					

View Printable Version      View Approvals      \*Go to ...More... ▼

Save    Notify    Refresh      Add

10. **Schedule**- enter the 'Ship To'(delivery location) and Due Date here.

- Ship to**- should default to your location & can select other locations by clicking on magnifying glass.
- Due Date**- click on the calendar icon to change due date. The due date is the date you want the goods to be delivered to your location.

### Schedule

**Business Unit** MAC01 **Requisition Date** 06/06/2018

**Requisition ID** NEXT **Status** Open

[Return to Main Page](#)

Line	Item	Quantity	Merchandise Amt
1	na	1.0000 Each	0.00 CAD

#### Schedule

[Details](#) [Maintenance WO](#)

Sched	*Ship To	Quantity	Price	Merchandise Amount	Due Date	Attention To	Status
1	031_REQ	1.0000	0.00000	0.00			Active

[Add Ship To Comments](#)

[Save](#) [Notify](#) [Refresh](#)

[Add](#) [Update/Display](#)



11. Click on the **Distribution** icon at the end of the line.

### Schedule

Business UnitMAC01

Requisition IDNEXT

Requisition Date06/06/2018

StatusOpen

[Return to Main Page](#)

Line

Find | View All

First1 of 1Last

1	Item	na	Quantity	1.0000	Each	Merchandise Amt	0.00 CAD																						
<div><div>Schedule</div><div>Personalize   Find   View All  </div><div>First1 of 1Last</div></div> <div><div>Details</div><div>Maintenance WO</div></div> <table><thead><tr><th>Sched</th><th></th><th>*Ship To</th><th>Quantity</th><th>Price</th><th>Merchandise Amount</th><th>Due Date</th><th>Attention To</th><th></th><th></th><th>Status</th></tr></thead><tbody><tr><td>1</td><td></td><td>031_RE</td><td></td><td>1.0000</td><td>0.00000</td><td>0.00</td><td></td><td></td><td> </td><td>Active</td></tr></tbody></table>								Sched		*Ship To	Quantity	Price	Merchandise Amount	Due Date	Attention To			Status	1		031_RE		1.0000	0.00000	0.00				Active
Sched		*Ship To	Quantity	Price	Merchandise Amount	Due Date	Attention To			Status																			
1		031_RE		1.0000	0.00000	0.00				Active																			

[Add Ship To Comments](#)

Save

Notify

Refresh

Add

Update/Display

12. Enter your Chart field information in the Distribution fields.

- a. Only populate the fields that apply to your Chart string. Click on the magnifying glass next to each field to find the appropriate information and select.
- b. Select **Ok** when done entering information.

**Distribution**

Requisition ID NEXT      Item na

Line 1      Status Active

Schedule 1

Ship To 031\_RECV      WEST CAMPUS      Quantity 1.0000 EA

\*Distribute By Quantity      Open Quantity 1.0000

\*Liquidate By Amount      Merchandise Amt 0.00 CAD

SpeedChart  Multi-SpeedCharts

**Distributions** Personalize | Find | View All | First

**Chartfields** Details Asset Information Budget Information

Distrib	Status	Percent	Quantity	Merchandise Amount	GL Unit	Account	Fund	Dept	Program	PC Bus Unit	Project	Activity	Source Type	Affiliate	Fund Affiliate
1	Open	100.0000	1.0000	0.00	MAC01	600300									

a. **OK** Cancel Refresh

b.

13. This will take you one step back to Schedule. Click on **Return to Main Page**.

### Schedule

Business UnitMAC01

Requisition IDNEXT

Requisition Date06/06/2018

StatusOpen

[Return to Main Page](#)

Line	Item	na	Quantity	1.0000	Each	Merchandise Amt	0.00 CAD																
<div><div>Schedule</div><div>Personalize   Find   View All     First 1 of 1 Last</div><div><div>Details</div><div>Maintenance WO </div></div><table><thead><tr><th>Sched</th><th>*Ship To</th><th>Quantity</th><th>Price</th><th>Merchandise Amount</th><th>Due Date</th><th>Attention To</th><th>Status</th></tr></thead><tbody><tr><td>1</td><td> 031_RE </td><td> 1.0000</td><td>0.00000</td><td>0.00</td><td></td><td></td><td>Active  </td></tr></tbody></table></div>								Sched	*Ship To	Quantity	Price	Merchandise Amount	Due Date	Attention To	Status	1	031_RE	1.0000	0.00000	0.00			Active
Sched	*Ship To	Quantity	Price	Merchandise Amount	Due Date	Attention To	Status																
1	031_RE	1.0000	0.00000	0.00			Active																

Add Ship To Comments

Save

Notify

Refresh

Add

Update/Display

14. Click on the **Supplier** tab to select the supplier. If the Supplier is not listed you will need to request a supplier setup by going to **Finance-Purchasing-Requisitions** and Selecting: **Supplier Setup/Change Request**.

Click on magnifying glass to find the supplier.

The screenshot shows the McMaster University Mosaic system interface. The top navigation bar includes links for Home, My Profile, My Work, and Support. The main content area displays a requisition form for Requisition ID 0000001437. The form includes fields for Requisition Name, Requester (FOSTER, JANE ALLYSON), Requisition Date (19/03/2014), Origin (RSH), Currency Code (CAD), and Accounting Date (19/03/2014). A red arrow points to the magnifying glass icon in the 'Supplier' column of the line items table.

Line	Description	Supplier	Supplier Name	Location
1	DIF50 Human IFN-	00C0009388	CEDARLANE	BURLINGTON
2	HSTA00D Human	00C0009388	CEDARLANE	BURLINGTON
3	D605C Human IL-6	00C0009388	CEDARLANE	BURLINGTON
4	ELH-IL1B-1 Human	00C0009388	CEDARLANE	BURLINGTON
5	ELH-IL1B-2 Human	00C0009388	CEDARLANE	BURLINGTON
6	ELH-IL10-1 Human	00C0009388	CEDARLANE	BURLINGTON
7	ELH-IL10-2 Human	00C0009388	CEDARLANE	BURLINGTON

Repeat steps 9 to 14 for each line on your requisition.

Requisitions for services, or large goods that require multiple payments for the same item (meaning the supplier will be issuing more than 1 invoice to be paid) should be setup as **Amount Only** Requisitions. **Skip this step if the supplier is issuing only 1 invoice against the purchase order.**

15. a) Click on the **Attributes** tab.
- b) Select '**Amount Only**' so a check mark appears in that field.

Maintain Requisitions

### Requisition

Business Unit: MAC01  
 Requisition ID: NEXT  
 Requisition Name: test amount only [Copy From](#)

Status: Open   
 Budget Status: Not Chkd

☐ Hold From Further Processing

---

**Header** ?

\*Requester: CHAPMDJ Josh Chapman  
 \*Requisition Date: 2013/12/10 [Requester Info](#)  
 Origin: ONL Operating  
 \*Currency Code: CAD Dollar  
 Accounting Date: 2013/12/10

[Requisition Defaults](#) [Add Comments](#)  
[Requisition Activities](#)

**Amount Summary** ?

Merchandise Amount	5,000.00 CAD	
Tax	650.00 CAD	<a href="#">Recalc Gross</a>
<b>Total Amount</b>	<b>5,650.00 CAD</b>	

[Add Items From](#) ?

[Purchasing Kit](#) [Catalog](#)  
[Item Search](#) [Requester Items](#)

---

**Line** ?

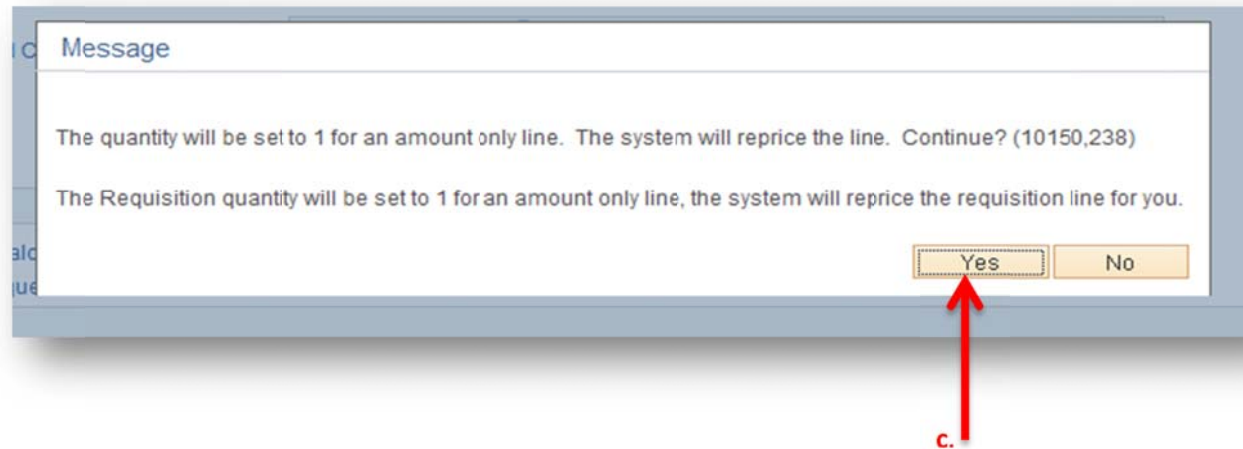
Details | Ship To/Due Date | Status | Supplier Information | Item Information | **Attributes** | Contract | Sourcing Controls

Line	Item	Description	Buyer	Name	Physical Nature	Zero Price Indicator	Amount Only	Inspection Required	Work Order (AiM)	Inspect ID
1		test	GILNERS	Nina Gilners	Goods	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>		

*Amount Only will allow the receiving and payment to be done by **\$ amount**, and not by quantity. The quantity will default to 1.*

**IMPORTANT:** Your PO cannot be both Quantity and Amount Only. If you have multiple lines on the PO, they must be the same in order for receiving and payment to be processed.

When the prompt message appears select 'Yes' to confirm.



Note that **quantity** field is unavailable for entry and the system has now hardcoded the quantity to 1, but the price field is now open. When you go to perform Receipts on this purchase order you will now be able to receive on **price** rather than **quantity**.

The screenshot shows the 'Maintain Requisitions' form. The 'Requisition' header includes fields for Business Unit (MAC01), Requisition ID (NEXT), and Requisition Name (test amount only). The 'Requester' is CHAPMDJ (Josh Chapman). The 'Requisition Date' is 2013/12/10. The 'Origin' is ONL (Operating). The 'Currency Code' is CAD (Dollar). The 'Accounting Date' is 2013/12/10. The 'Status' is Open. The 'Budget Status' is Not Chkd. The 'Amount Summary' shows a Merchandise Amount of 5,000.00 CAD, Tax of 650.00 CAD, and a Total Amount of 5,650.00 CAD. The 'Line' table has one line item with a Quantity of 1.0000, which is circled in red.

Line	Item	Description	Quantity	UOM	Category	Price	Merchandise Amount	Status
1		test	1.0000	EA	10000000	5,000.00	5,000.00	Open

16. **Adding Attachments:** Purchase requisitions always need an attachment added as an Approval Justification to confirm the goods/services have been procured through a process meeting current Purchasing Policies. Please refer to the current Purchasing Policy for requirements.

Click on **Add Comments** and a new Prompt box will appear.

The screenshot shows the 'Maintain Requisitions' page in the Mosaic system. The page header includes the McMaster University logo and the Mosaic title. The breadcrumb trail is: Favorites > Main Menu > Finance > Purchasing > Requisitions > Add/Update Requisitions. The page contains several sections:

- Business Unit:** MAC01
- Requisition ID:** NEXT
- Requisition Name:** [Text Field] Copy From
- Status:** Open (with a green checkmark icon)
- Budget Status:** Not Chkd (with a magnifying glass icon)
- Hold From Further Processing:** [Checkbox]
- Header Section:**
  - \*Requester: FELTONT (with a magnifying glass icon) FELTON, TRACIE
  - \*Requisition Date: 19/03/2014 (with a calendar icon) Requester Info
  - Origin: ONL (with a magnifying glass icon) Operating
  - \*Currency Code: CAD (with a magnifying glass icon) Dollar
  - Accounting Date: 19/03/2014 (with a calendar icon)
- Amount Summary:**
  - Merchandise Amount: 0.00 CAD
  - Tax: 0.00 CAD
  - Total Amount: 0.00 CAD
  - Buttons: Recalc Gross
- Add Items From:** [Text Field]
- Purchasing Kit:** Catalog
- Item Search:** Requester Items
- Line Section:**
  - Line 1: [Text Field] 0.0000 [Text Field] [Text Field] [Text Field] 0.00 Open

A red arrow points to the 'Add Comments' link located below the 'Requester Info' section. At the bottom of the page, there are buttons for 'Save', 'Notify', 'Refresh', 'Add', and 'Update/Display'.

## 17. Adding comments:

Note the comment box is 1 of 1 and hitting the + button allows for additional comments to be added. If you added a comment box which you want removed hit the **Inactivate** button and the comment box will be removed.

Comments Box

Who will see comments – select a box see definitions page 17

To add an attachment

To add additional comment/s

Select Email to ensure the attachment/s makes it to the supplier when sending an attachment. Make sure you select: Send to Supplier



**Who will see the Comments:**

Whatever you type in the comment box is visible to what group is selected below the box.

**Send to Supplier-** comments get sent to the Supplier with the purchase order.

**Show at Voucher-** comments are visible to Accounts Payable when invoices are processed.

**Show at Receipt-** comments are visible to McMaster Receiving Departments when receiving the goods.

**Approval Justification-** comments are visible internally only. This comment is for internal backup to support purchasing policies. Multiple quotes and Sole Source documents are to be inserted here.

***(All of the above options are found under the comments box)***

18. Adding Attachments: ***(See visual page 16)***

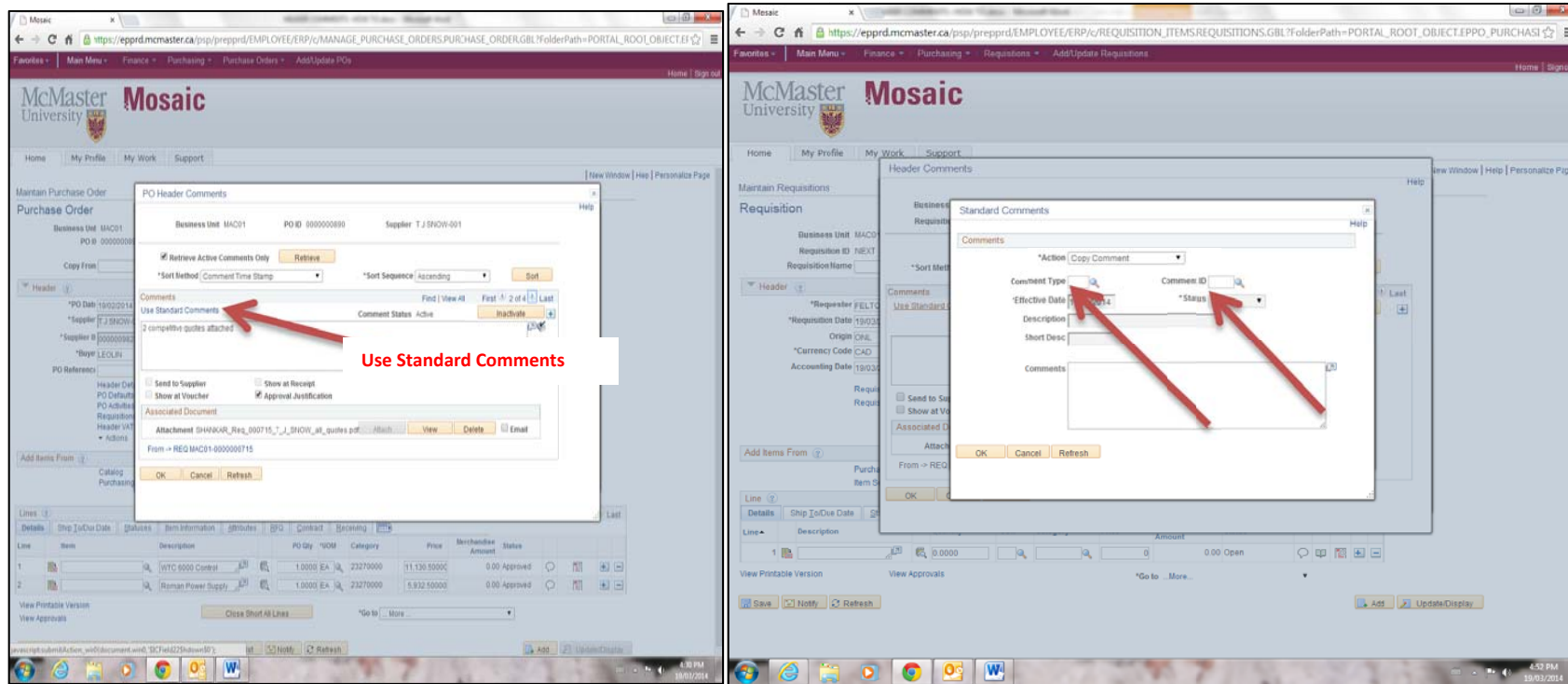
To add attachments hit the **Attach** button. Select **Choose File** to find the file to be attached and select **Upload**. The attachment gets attached to the comment box that is open.

If you want the attachment **Sent to the Supplier** be sure you click off **Email**, otherwise the file won't emailed to the Supplier when the purchase order is dispatched by the system.

***Types of documents that should be attached if applicable:***

- Quote or Sole Source (Remember Sole Source documents require signatures with the exception of the CFO who approves electronically through PeopleSoft.)
- Contract (Remember contracts require physical signatures as per Execution of Instruments.)
- ICQ- Independent Contractor Questionnaire- (For orders over \$10,000 ICQ form approved by ICQ Administrator with assigned ICQ number)

In addition to being able to add custom comments to the requisitions there are Standard Comments which can be inserted into the comments section. Select **Use Standard Comments**. Click on the magnifying glass to select the comment. Select the comment from the dropdown list.



- Click on the magnifying glass next to Comment Type and then choose your Comment Type
- Once the comment type is chosen then click the Comment ID you would like to use
- Select **Ok** and it will be pasted in your main comment box.
- For US Orders only**- Select **Shipping Comments** and **Customs** as the **Comment ID**. This will paste the McMaster custom's broker information into the comment box. Be sure to select **Send to Supplier** and click off **Email** so it is sent to the supplier with the purchase order.
- Incoterms**- When entering requisitions for goods it is important to list the Incoterms in the Header and select **Send to Supplier**.

Incoterms are term used by the industry to clearly communicate the tasks, costs, and risks associated with the transportation and delivery of goods.

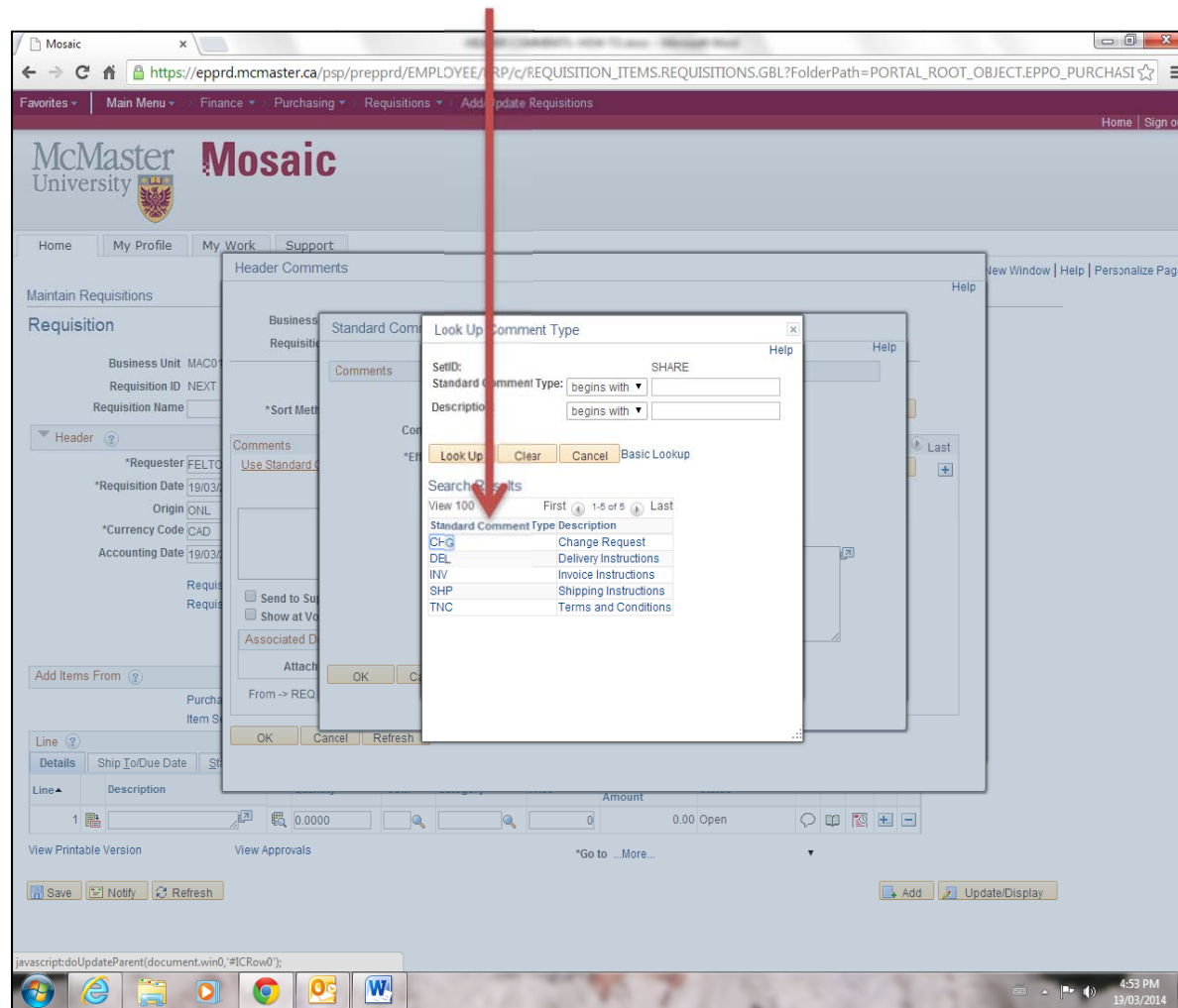
**Some examples of Incoterms are: (Incoterms are not found within the Standard comments, these need to be entered manually)**

*DAP- delivered at place*

*DDP- delivered duty paid*

*FOB- free on board*

List of Comment Types to choose from – once the Comment Type is selected you will now select the comment ID which, will populate in the comments box.



#### **Routing a Sole/Single Source Form to the AVP of Admin & CFO:**

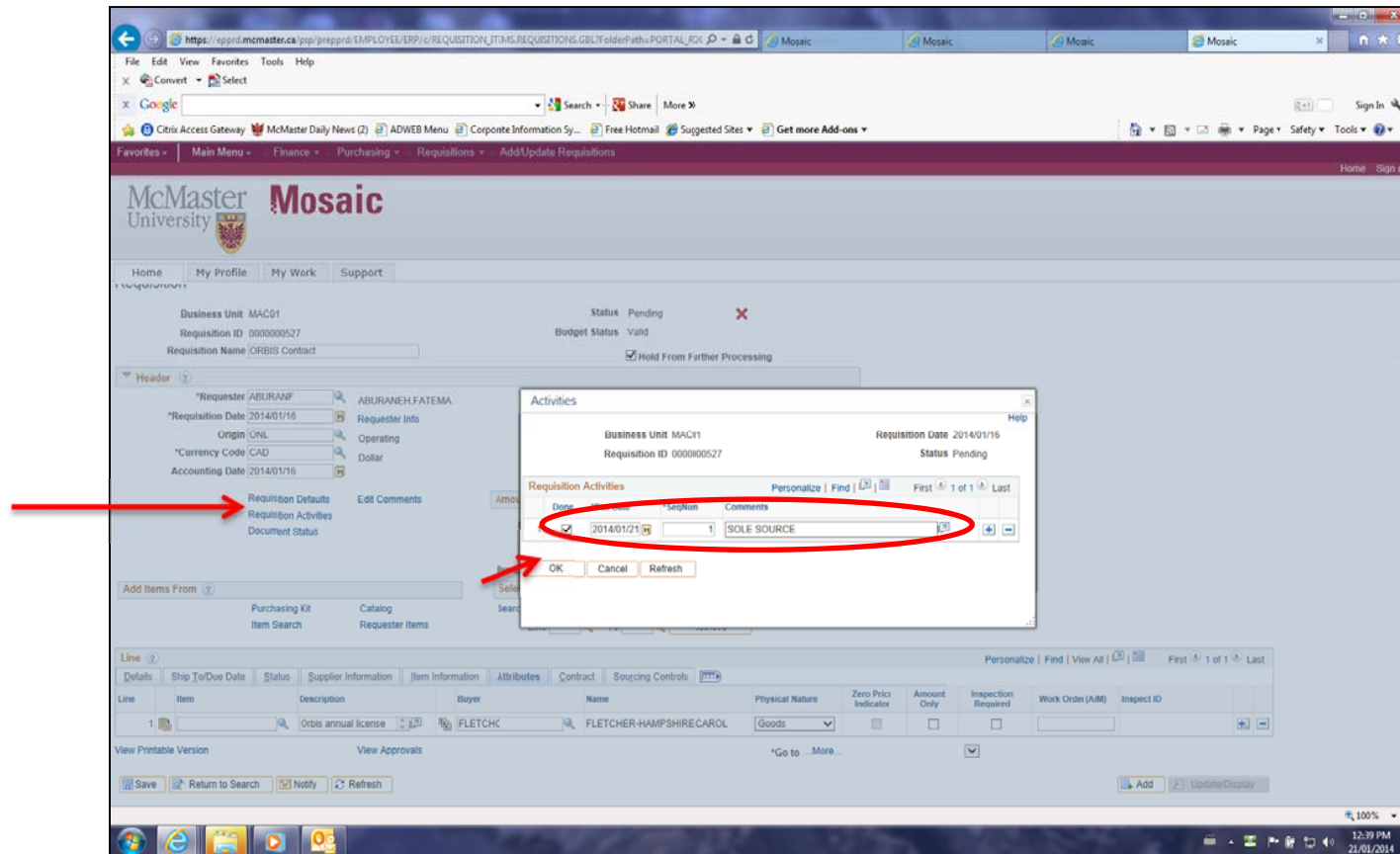
19. Adding a Sole Source to a requisition- How to guide a form to the AVP of Admin & CFO (Refer to SP01 to see if your order meets the required thresholds):  
<http://www.mcmaster.ca/bms/policy/purchase/SP-01.pdf> (Example over \$10,000 a Sole Source would be required if you are unable to obtain 2 competitive quotations).

To be compliant with laws, regulations, public policy and McMaster University's Strategic Procurement Policy SP-01, all acquisitions must be subject to competitive bidding. In rare, specific or exceptional circumstances, only one supplier or consultant may be able, or capable, of providing goods or services.

When a competitive bid cannot be completed for an acquisition the purchaser must complete a Single/Sole Source Certificate and get appropriate approval signatures. *The AVP Administration & CFO is to be completed electronically via PeopleSoft.*

Ensure you have attached your Sole Source to the "Approval Justification" in the comments portion of the requisition. ***(Instructions as listed above within page 15 – 17 to add attachments)***

- a. Select **Requisition Activities** in the Header.
- b. Type in the words “Sole Source” under Comments and then click off “Done” so a check mark appears. This will route the requisition to the **AVP of Administration/CFO for review/approval**.



- c. The AVP of Admin/CFO will now be listed as one of the approvers on the requisition once the requisition is saved and submitted for approval. To see the routing go to View Approvals found within the main page of the requisition. Once the View Approvals is selected you will then be able to see the name of the AVP of Administration/CFO (D. Henne.)

The image consists of two side-by-side screenshots of the McMaster University Mosaic system interface.

**Left Screenshot:** Shows the 'Requisition' form. At the top, there's a navigation bar with 'Home', 'My Profile', 'My Work', and 'Support'. Below this, the 'Requisition' form is displayed. It includes fields for 'Business Unit' (MAC01), 'Requisition ID' (000001408), and 'Requisition Name' (000001408). There are also fields for 'Requester' (GAGNON, WARREN), 'Request Date' (18/03/2014), 'Origin' (OHL), 'Currency Code' (CAD), and 'Accounting Date' (18/03/2014). An 'Amount Summary' table is visible, showing 'Merchandise Amount' (23,550.00 CAD), 'Tax' (3,061.50 CAD), 'Total Amount' (26,611.50 CAD), and 'Pre-Encumbrance Balance' (24,953.03 CAD). At the bottom, there's a table with one line item: '1 Shopping cart'. A red arrow points to the 'View Approvals' link at the bottom of the page.

**Right Screenshot:** Shows the 'View Approvals' window. It displays the same requisition details as the left screenshot. Below the details, there's a section titled 'Requisition Line Approvals' for 'Line 1: Pending'. It shows a list of approvers: '2. Department Manager (OHL)' with 'Approved' status and 'BRUNIER, WENDY' as the approver. Below this, there's a section titled 'Requisition Sole Source Approv' with a status of 'Not Routed'. A red circle highlights the 'Requestion Sole Source Approv' link, and a red arrow points to it.

**FINALIZING YOUR REQUISITION: (It's important to follow these steps as listed to ensure your requisition is submitted correctly)**

**Save – Budget Check – Green Checkmark : to submit for approval**

20. Select the **Save** button. A requisition number will be generated next to **Requisition ID**.

The screenshot shows the McMaster University Mosaic requisition system interface. The top navigation bar includes links for Home, My Profile, My Work, and Support. The main content area is titled 'Maintain Requisitions' and 'Requisition'. The 'Requisition ID' field is highlighted with a red arrow and contains the text 'NEXT'. Below this, there are fields for Business Unit (MAC01), Requisition Name, and a 'Copy From' button. The 'Status' is 'Open' and 'Budget Status' is 'Not Chkd'. There are also checkboxes for 'Hold From Further Processing' and 'Use Procurement Card'. The 'Header' section includes fields for \*Requester (FELTONT), \*Requisition Date (20/03/2014), Origin (ONL), \*Currency Code (CAD), and Accounting Date (20/03/2014). The 'Amount Summary' section shows Merchandise Amount (0.00 CAD), Tax (0.00 CAD), and Total Amount (0.00 CAD). The 'Add Items From' section includes links for Purchasing Kit, Catalog, Item Search, and Requester Items. The 'Line' table has one row with Line 1, Description, Quantity (0.0000), \*UOM, Category, Price, Merchandise Amount (0.00), and Status (Open). At the bottom, there are buttons for 'View Printable Version', 'View Approvals', 'Save', 'Notify', 'Refresh', 'Add', and 'Update/Display'. A red arrow points to the 'Save' button.

21. Click on the **Budget Check** button. The budget check will be performed and budget check status will change from Pending to Approved.

Mosaic - Google Chrome  
https://epprd.mcmaster.ca/psp/preprd/EMPLOYEE/ERP/c/REQUISITION\_ITEMS.REQUISITIONS.GBL?FolderPath=PORTAL\_ROOT\_OBJECT.EPPO\_PURCHASING.EPCO\_REQUISITIONS.I

Home | Sign out

McMaster University Mosaic

Home | My Profile | My Work | Support | New Window | Help | Personalize Page

Maintain Requisitions

Requisition

Business Unit: MAC01  
Requisition ID: NEXT  
Requisition Name: [Text Box] Copy From

Status: Open ☒  
Budget Status: Not Chk'd ☐ **Budget Check**   
☐ Hold From Further Processing

Header

\*Requester: FELTONT [Search] FELTON, TRACIE  
\*Requisition Date: 20/03/2014 [Calendar] Requester Info  
Origin: ONL [Search] Operating  
\*Currency Code: CAD [Search] Dollar  
Accounting Date: 20/03/2014 [Calendar]

Card Number: [Text Box]  
Expiration Date: [Text Box]  
☐ Use Procurement Card

Requisition Defaults | Add Comments  
Requisition Activities

Amount Summary

Merchandise Amount	0.00	CAD
Tax	0.00	CAD
Total Amount	0.00	CAD

Recalc Gross

Add Items From

Purchasing Kit Catalog  
Item Search Requester Items

Line	Description	Quantity	UOM	Category	Price	Merchandise Amount	Status
1		0.0000			0	0.00	Open

View Printable Version | View Approvals | \*Go to ...More...

Save | Notify | Refresh | Add | Update/Display

javascript:submitAction\_win0(document.win0,'APPROVAL\_PB');

4:01 PM 20/03/2014

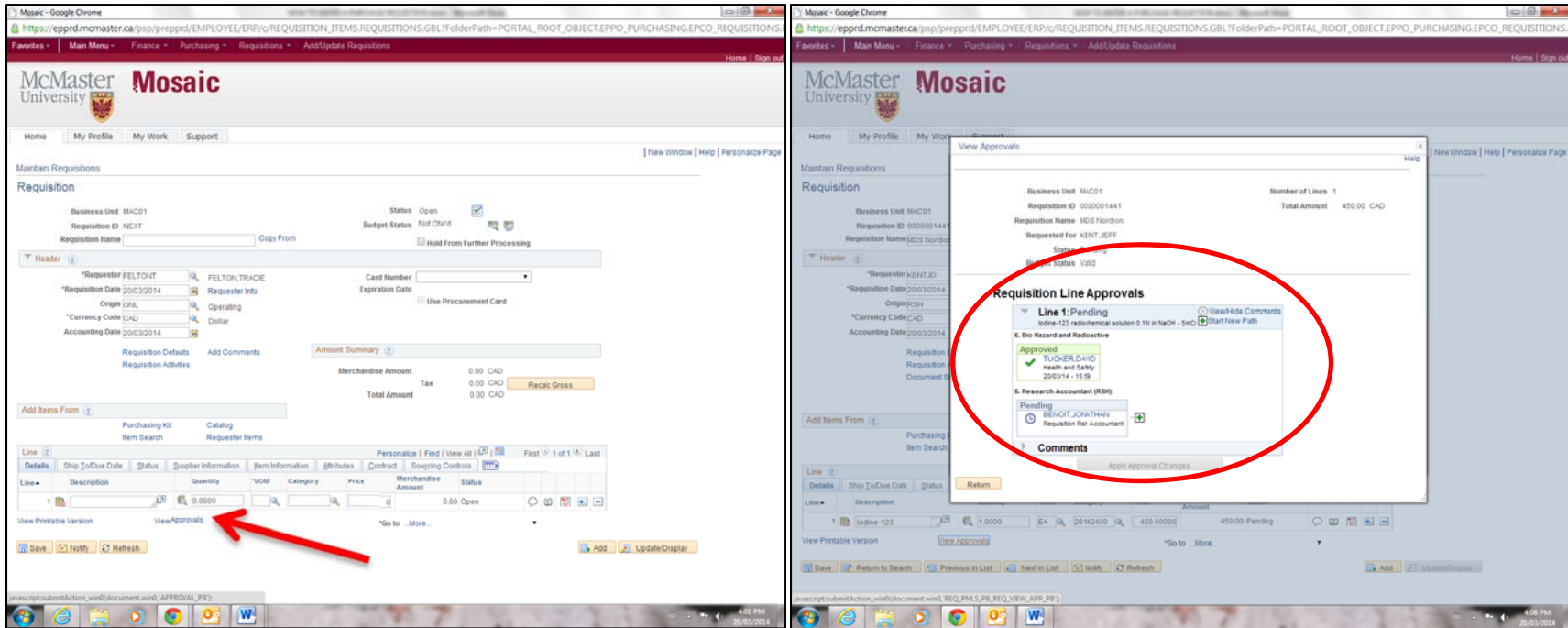


22. Click the green checkmark to submit the requisition to be routed to the next approver.

The screenshot shows the McMaster University Mosaic requisition system interface. The top navigation bar includes links for Favorites, Main Menu, Finance, Purchasing, Requisitions, and Add/Update Requisitions. The main header displays the McMaster University logo and the Mosaic title. Below the header, there are tabs for Home, My Profile, My Work, and Support. The main content area is titled "Maintain Requisitions" and "Requisition". It contains fields for Business Unit (MAC01), Requisition ID (NEXT), and Requisition Name. There are also fields for Status (Open), Budget Status (Not Chkd), and a checkbox for "Hold From Further Processing". A red circle and arrow highlight a green checkmark icon in the top right corner of the requisition details section, indicating the submission step. Below these fields, there are sections for "Header" and "Amount Summary". The "Header" section includes fields for \*Requester (FELTONT), \*Requisition Date (20/03/2014), Origin (ONL), \*Currency Code (CAD), and Accounting Date (20/03/2014). The "Amount Summary" section shows Merchandise Amount (0.00 CAD), Tax (0.00 CAD), and Total Amount (0.00 CAD). At the bottom, there is a table with columns for Line, Description, Quantity, \*UOM, Category, Price, Merchandise Amount, and Status. The table contains one row with Line 1, Description, Quantity 0.0000, \*UOM, Category, Price, Merchandise Amount 0.00, and Status Open. Below the table, there are buttons for Save, Notify, Refresh, Add, and Update/Display. The bottom status bar shows the date and time: 4:01 PM 20/03/2014.

This will show you the names of the individuals that need to approve the purchase requisition and where it is in the approval process. (*Approval Route*) :

23. Click on the **View Approvals** button.



## You have now completed a requisition. What next?

### **The flow of the Requisition:**

- Once approvals are complete, the **Requisition** will be Auto Sourced into a **Purchase Order**.
- The Purchase Order will be sent to the Supplier by the PeopleSoft system or by a Procurement Specialist.
- The Goods or Services are then received by you the end-user, unless the goods you had purchased had come directly to HSC or General Receiving. A **Receipt ID Number** is assigned to the Purchase order once the Goods or Services are received in PeopleSoft.

- Remember there are 3 key numbers tied to one order processed before payment:

Requisition Number

Purchase Order  
Number

Receipt Id Number