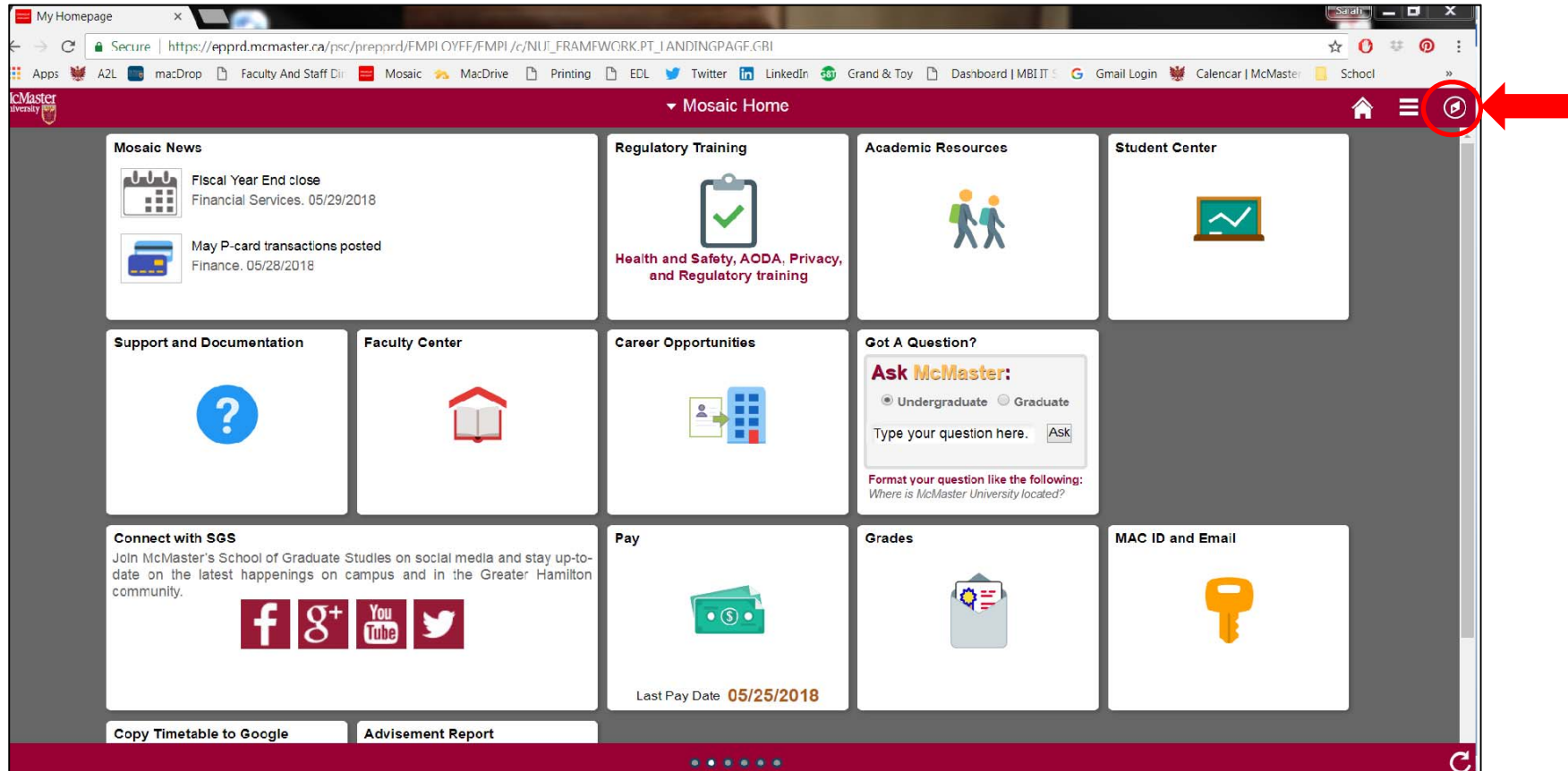


How to Enter a Purchase Requisition

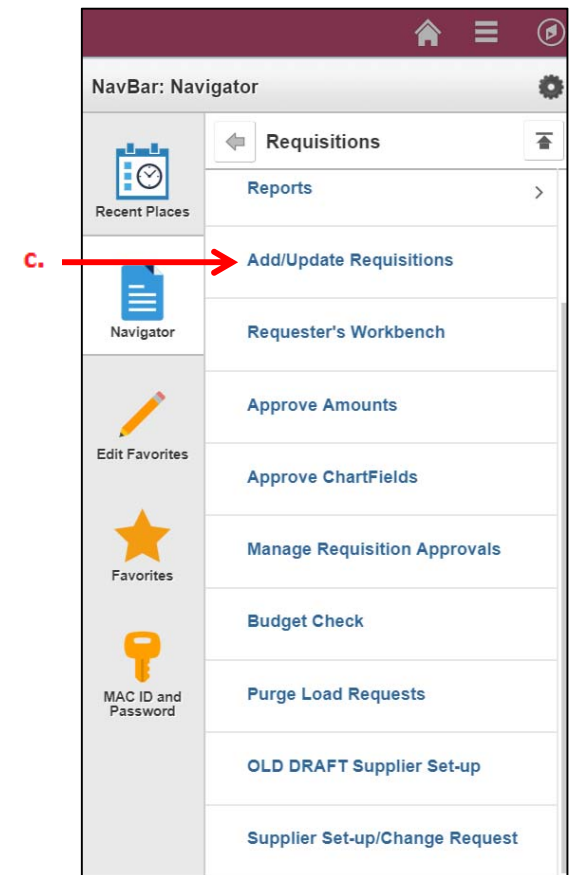
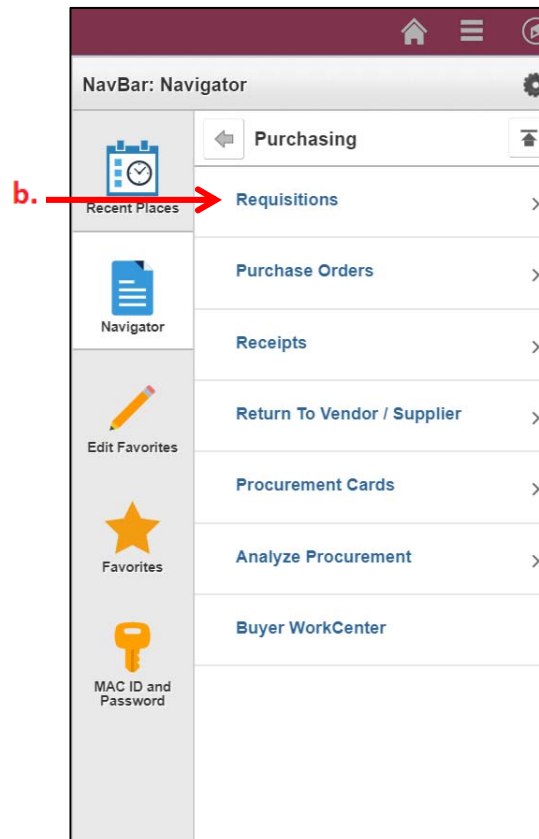
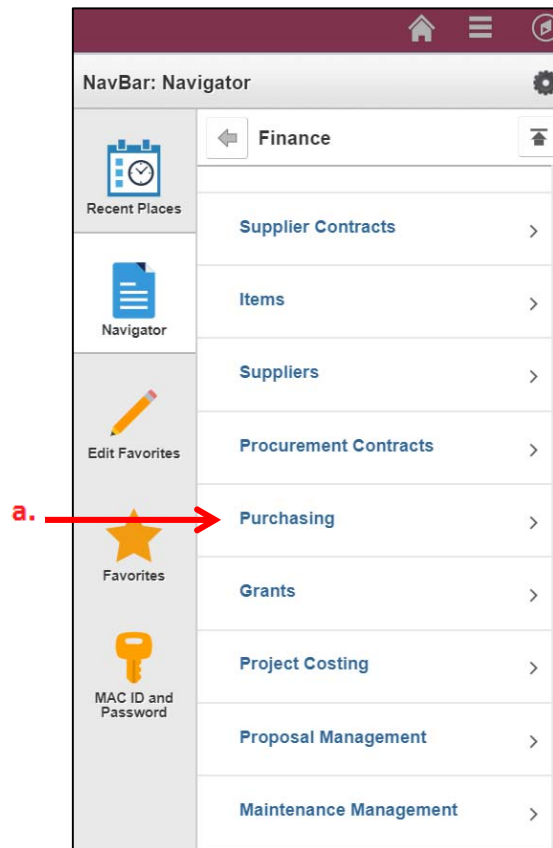
1. Login to MOSAIC
2. Select the NavBar Icon at the top of the screen



3. Select 'Navigator', then 'Finance'

The screenshot shows the McMaster University Mosaic Home page. The page has a dark red header with the McMaster University logo and the text "Mosaic Home". Below the header, there are several content blocks. On the right side, there is a vertical sidebar titled "NavBar: Navigator". This sidebar contains a list of links: "Campus Solutions", "Finance", "Human Resources", "Email Management", "MAC ID Management", and "My Preferences". A red arrow points from the "Navigator" link in the sidebar to the "Finance" link. Another red arrow points from the "Finance" link to the "Navigator" link in the sidebar. The main content area of the page includes sections for "Mosaic News", "Regulatory Training", "Academic Resources", "Support and Documentation", "Faculty Center", "Career Opportunities", "Got A Question?", "Connect with SGS", "Pay", and "Grades".

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, and 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 0.00 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.

- a. **Ship to**- should default to your location & can select other locations by clicking on magnifying glass.
- b. **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

Find | View All First 1 of 1 Last

1

Item na

Quantity 1.0000 Each

Merchandise Amt 0.00 CAD

Schedule

Personalize | Find | View All | 1 of 1 Last

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 Unit

MAC01

Requisition Date

06/06/2018

Requisition ID

NEXT

Status

Open

Return to Main Page

Line

Find | View All

First

1 of 1

Last

1	Item	na	Quantity	1.0000	Each	Merchandise Amt	0.00 CAD																
<div><div>Schedule</div><div>Personalize Find View All </div><div>First</div><div>1 of 1</div><div>Last</div></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>								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.

15. **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 'Add/Update Requisitions' page in the McMaster University Mosaic system. The page includes a header with the McMaster University logo and 'Mosaic' branding. Below the header, there are navigation tabs for 'Home', 'My Profile', and 'My Work'. The main content area is titled 'Maintain Requisitions' and 'Requisition'. It displays various fields for requisition details, including Business Unit (MAC01), Requisition ID (NEXT), and Requisition Name. A red arrow points to the 'Add Comments' link, which is located below the 'Requisition Defaults' and 'Requisition Activities' links. The page also includes an 'Amount Summary' section with fields for Merchandise Amount, Tax, and Total Amount. At the bottom, there is a table for requisition lines, with the first line showing a quantity of 0.0000 and a status of 'Open'. The page also features a 'View Approvals' link and a 'Go to ...More...' dropdown menu.

Business Unit: MAC01
Requisition ID: NEXT
Requisition Name: [Text Field] Copy From [Text Field]
Status: Open
Budget Status: Not Ch'kd
Hold From Further Processing: ☐
Header: [?]
*Requester: FELTONT [?] FELTON, TRACIE
*Requisition Date: 19/03/2014 [?] Requisition Info
Origin: ONL [?] Operating
*Currency Code: CAD [?] Dollar
Accounting Date: 19/03/2014 [?]
Requisition Defaults
Requisition Activities
Add Comments
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: [?]
Requisition Items: [?]
Line: [?]
Details: [?] Ship To/Due Date: [?] Status: [?] Supplier Information: [?] Item Information: [?] Attributes: [?] Contract: [?] Sourcing Controls: [?]
Line: 1 Description: [?] Quantity: 0.0000 UOM: [?] Category: [?] Price: [?] Merchandise Amount: 0.00 Status: Open
View Printable Version View Approvals *Go to ...More...
Save Notify Refresh Add Update/Display

16. 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 15

To add an attachment

To add additional comment/s

**Select Email if you would like the attachment/s to be sent to the supplier with the Purchase Order.
*Make sure you have also selected Send to Supplier**

Who will see the Comments:

Whatever you type in the comment box is visible to the group(s) 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)

17. Adding Attachments: ***(See visual page 14)***

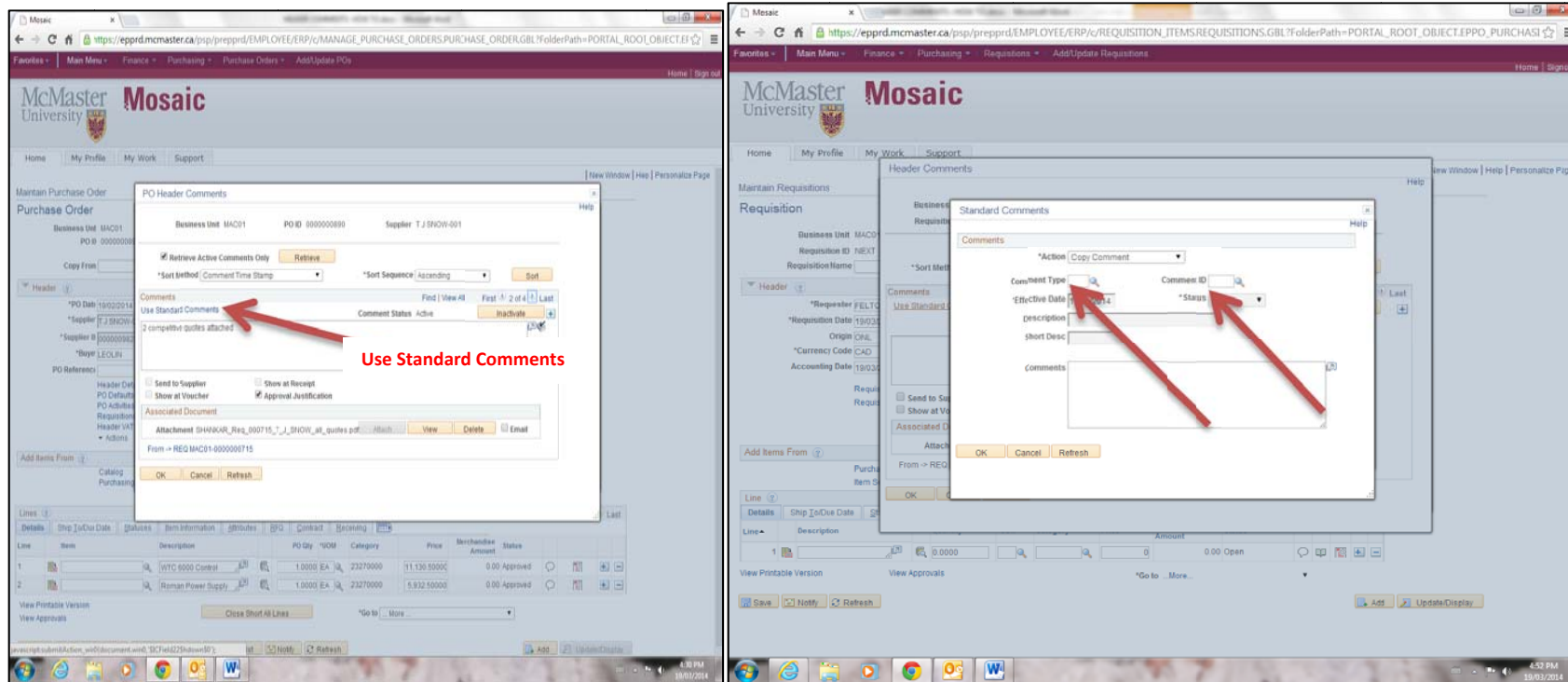
To add attachments hit the **Attach** button. Select **Choose File** to find the file to be attached and select **Upload**. The attachment gets attached to the comment box that is open.

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.

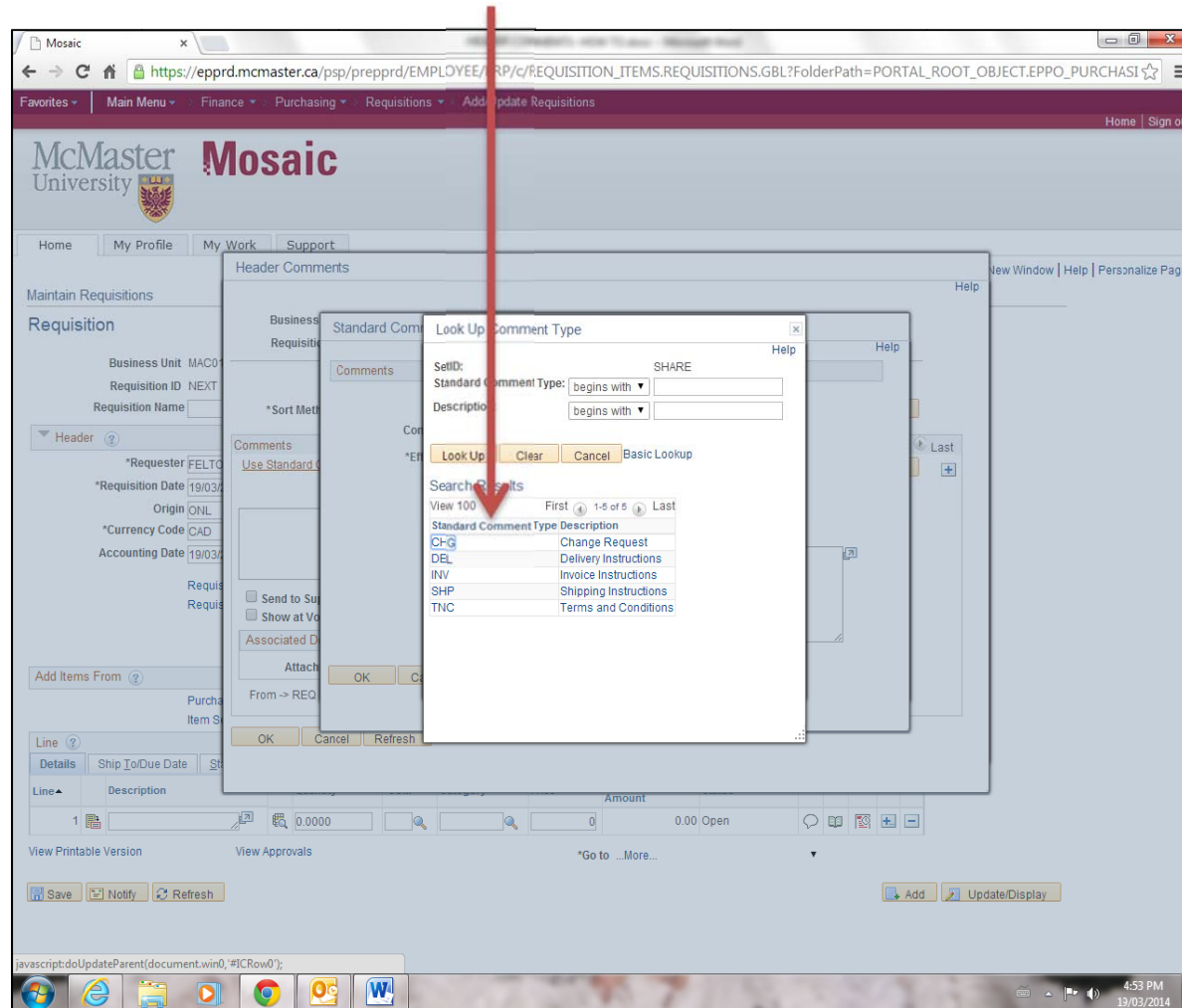
Some examples of Incoterms are: (Incoterms are not found within the Standard comments, these need to be added as comments manually)

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:

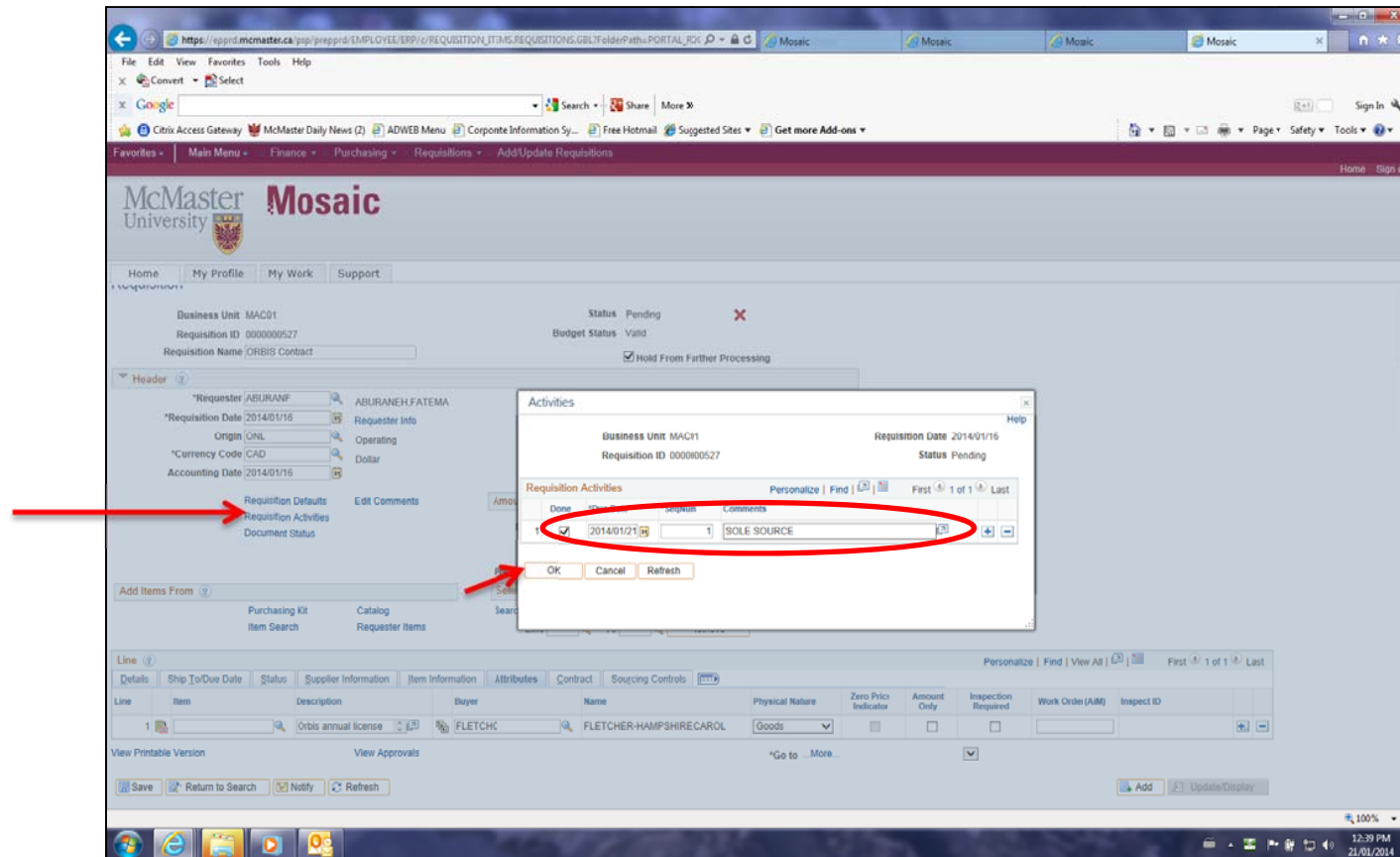
18. Adding a Sole Source to a requisition- How to guide a form to the AVP of Admin & CFO (Refer to SP01 to see if your order meets the required thresholds):
<http://www.mcmaster.ca/bms/policy/purchase/SP-01.pdf> (Example over \$10,000 a Sole Source would be required if you are unable to obtain 2 competitive 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 & 16 to add attachments)***

- Select **Requisition Activities** in the Header.
- 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. The left screenshot shows the 'Requisition' page for requisition ID 000001408. It displays fields for the requester (GAGNON, WARREN), dates, and amounts. A red arrow points to the 'View Approvals' link at the bottom of the page. The right screenshot shows the 'View Approvals' window for the same requisition. It lists the requisition details and shows a table of approvals. A red circle highlights the 'Not Routed' status for the requisition, and a red arrow points to the 'View Approvals' link at the bottom of the window.

Requisition Details (Left Screenshot):

- Business Unit: MAC01
- Requisition ID: 000001408
- Requisition Name: 000001408
- Status: Pending
- Budget Status: Valid
- Requester: GAGNON, WARREN
- Request Date: 18/03/2014
- Origin: CRL
- Currency Code: CAD
- Accounting Date: 18/03/2014
- Amount Summary:
 - Merchandise Amount: 23,550.00 CAD
 - Tax: 3,061.50 CAD
 - Total Amount: 26,611.50 CAD
 - Pre-Encumbrance Balance: 24,353.03 CAD

View Approvals Window (Right Screenshot):

- Business Unit: MAC01
- Requisition ID: 000001408
- Requisition Name: 000001408
- Status: Pending
- Budget Status: Valid
- Number of Lines: 1
- Total Amount: 23,550.00 CAD
- Justification: sole source attached
- Requester: GAGNON, WARREN
- Request Date: 18/03/2014
- Origin: CRL
- Currency Code: CAD
- Accounting Date: 18/03/2014
- Requisition Line Approvals:
 - Line 1: Pending
 - 2. Department Manager (CRL): Approved (BRUNNER, VENET)
 - 3. Prof. Serv. (Item Cat 2): Pending (FELTON, TRACHE)
- Requisition Sole Source Approv:
 - Requisition 000001408: Awaiting Further Approvals

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

19. 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'. The 'Business Unit' is 'MAC01'. The 'Status' is 'Open'. The 'Budget Status' is 'Not Chkd'. The 'Requisition Name' field is empty. The 'Header' section contains 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 the 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). The bottom of the interface features buttons for View Printable Version, View Approvals, *Go to ...More..., Save, Notify, Refresh, Add, and Update/Display. A red arrow points to the 'Save' button.

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

The screenshot shows the McMaster University Mosaic 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 logo. 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 a form for requisition details, including Business Unit (MAC01), Requisition ID (NEXT), and Requisition Name. The form also includes a 'Header' section with fields for Requester (FELTONT), Requisition Date (20/03/2014), Origin (ONL), Currency Code (CAD), and Accounting Date (20/03/2014). A red circle highlights the 'Budget Check' button in the top right corner of the form. Below the header section, there are links for Requisition Defaults, Add Comments, and Requisition Activities. An '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 for requisition lines with columns for Line, Description, Quantity, UOM, Category, Price, Merchandise Amount, and Status. The table shows one line item with a quantity of 0.0000 and a status of Open. The bottom of the screen shows a Windows taskbar with various application icons and a system clock indicating 4:01 PM on 20/03/2014.

21. 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 page title is "Maintain Requisitions". The requisition details are as follows:

- Business Unit: MAC01
- Requisition ID: NEXT
- Requisition Name: [Text Field] Copy From
- Status: Open
- Budget Status: Not Chkd
- Card Number: [Dropdown]
- Expiration Date: [Text Field]
- Use Procurement Card: [Checkbox]
- *Requester: FELTONT (FELTON, TRACIE)
- *Requisition Date: 20/03/2014
- Origin: ONL (Operating)
- *Currency Code: CAD (Dollar)
- Accounting Date: 20/03/2014

The Amount Summary section shows:

Amount	CAD
Merchandise Amount	0.00
Tax	0.00
Total Amount	0.00

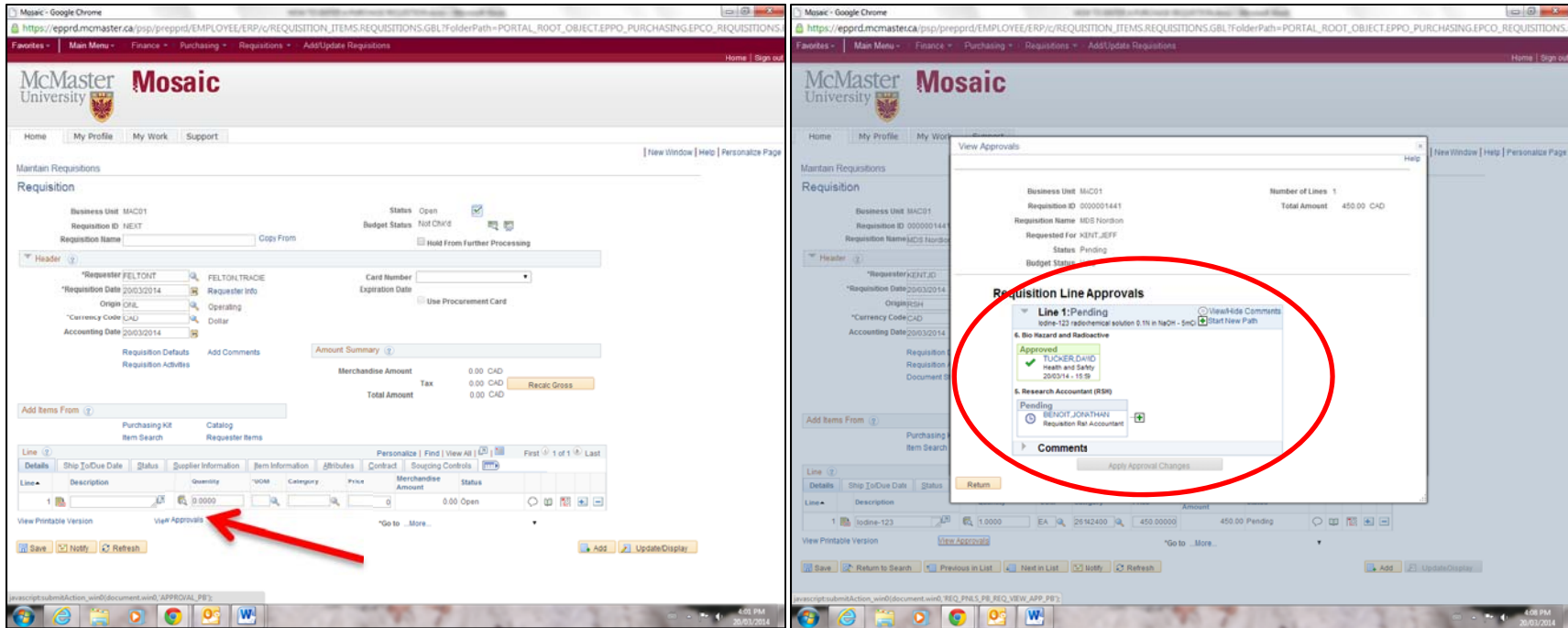
The Line table shows one line item:

Line	Description	Quantity	*UOM	Category	Price	Merchandise Amount	Status
1	[Text Field]	0.0000	[Text Field]	[Text Field]	[Text Field]	0.00	Open

The bottom of the page includes buttons for Save, Notify, Refresh, Add, and Update/Display. A red circle and arrow highlight a green checkmark icon in the top right status area, indicating the submission step.

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*):

22. 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