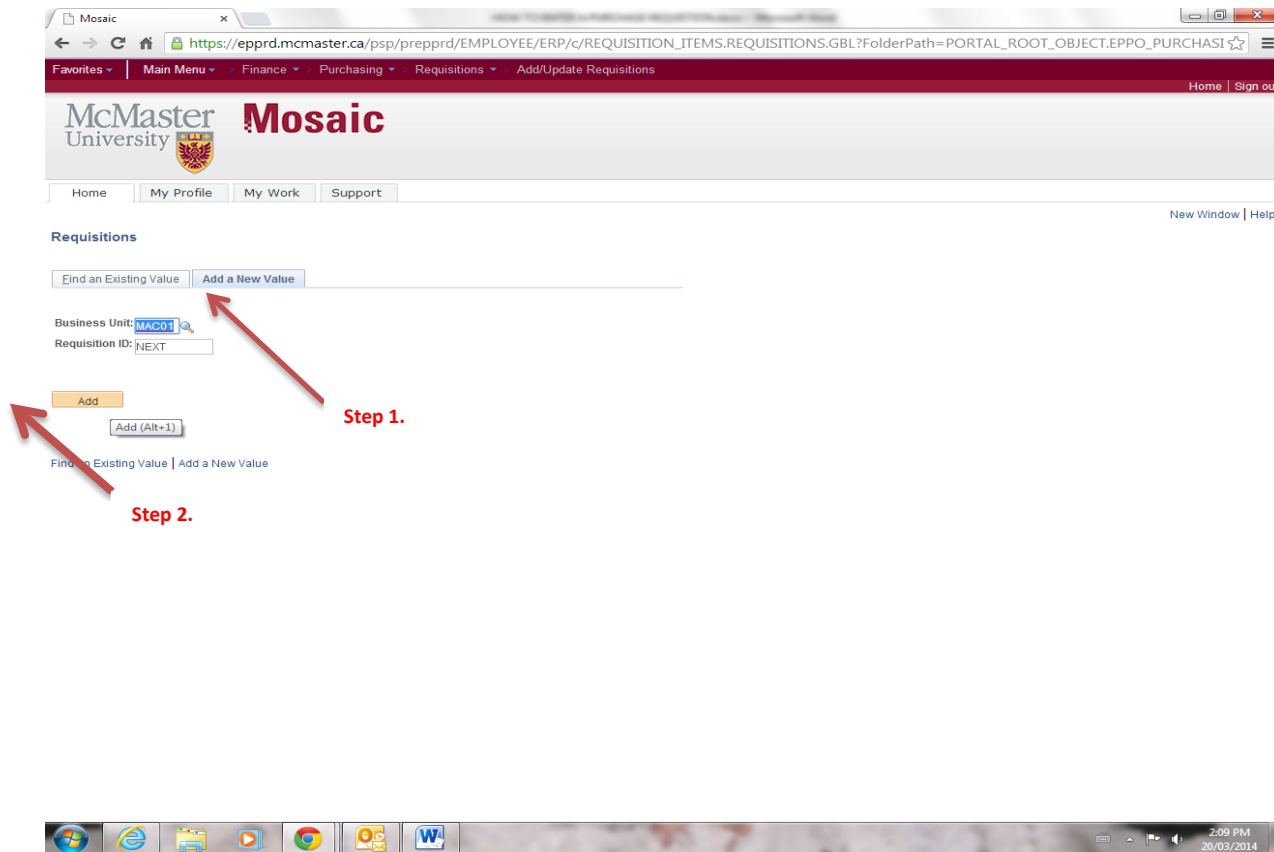


# PLEASE NOTE: THESE INSTRUCTIONS HAVE BEEN MODIFIED FOR RADIOACTIVE PURCHASES

## How to Enter a Purchase Requisition

1. Go to Finance-Purchasing-Requisitions and select **Add/Update Requisition**
2. 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.



*Once opening the requisition screen click on the supplier tab to ensure your supplier is in the PeopleSoft system. If the supplier is not in the system you will have to request a Supplier set-up. This is done by going to: Finance – Purchasing – Requisitions - Supplier Set-up/Change Request. Supplier Tab is shown on the next page.*

3. 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.

- a. **Origin**- Defaults to ONL. Will need to be changed to RSCH for Research accounts or CAP for Capital accounts (Facilities) where required.
- b. **Currency**- defaults to Canadian. Need to change for other currencies.

Step 3 a.

Step 3 b.

Supplier Tab

4. Now enter the Line item description on the Details line. *All Line Information*
  - a) **Item**- leave this field empty. (*Dead Field*)

- b. **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  
(**Description: Radioactive Purchases only**)- Put in Company, product number and amount ordering Ex: Perkin Elmer H3-NET328001MC)-1mCi It **MUST** include the radionuclide and activity
- c. **Quantity**- this is the number you are purchasing. For Services enter qty of 1.
- d. **UOM** - unit of measure. **Most requisitions will have EA (each) as UOM.** Click on magnifying glass to view other options.
- e. **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
- f. **RADIO ACTIVE MATERIAL PURCHASES MUST BE PUT INTO - CATEGORY 26142400.**
- g. **Price**- remember to enter the priced without taxes. PeopleSoft calculates the taxes for you

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.

Mosaic

https://epprd.mcmaster.ca/psp/preprd/EMPLOYEE/ERP/c/REQUISITION\_ITEMS.REQUISITIONS.GBL?FolderPath=PORTAL\_ROOT\_OBJECT.EPPO\_PURCHASI

Favorites Main Menu Finance Purchasing Requisitions Add/Update Requisitions 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

Header

\*Requester FELTONT  
\*Requisition Date 20/03/2014  
Origin ONL  
\*Currency Code CAD  
Accounting Date 20/03/2014

Requisition Defaults  
Requisition Activities

Status Open  
Budget Status Not Chkd  
Hold From Further Processing

Card Number  
Expiration Date  
Use Procurement Card

Amount Summary

Merchandise Amount 0.00 CAD  
Tax 0.00 CAD  
Total Amount 0.00 CAD

Recalc Gross

Add Items From

Purchasing Kit  
Item Search  
Catalog  
Requester Items

Line

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

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

2:25 PM  
20/03/2014

*Add an additional line*

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

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 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 various fields for requisition details, including Business Unit (MAC01), Requisition ID (NEXT), Requisition Name, Status (Open), Budget Status (Not Chkd), and a checkbox for 'Hold From Further Processing'. There are also fields for \*Requester (FELTONT), \*Requisition Date (20/03/2014), Origin (ONL), \*Currency Code (CAD), and Accounting Date (20/03/2014). An 'Amount Summary' section shows Merchandise Amount (0.00 CAD), Tax (0.00 CAD), and Total Amount (0.00 CAD). A red arrow points to the 'Schedule' icon at the end of the line item table. The line item table has columns for Line, Description, Quantity, \*UOM, Category, Price, Merchandise Amount, and Status. The first line item is Line 1, Description, Quantity 0.0000, \*UOM, Category, Price 0, Merchandise Amount 0.00, and Status Open. The 'Schedule' icon is located at the end of the line item table.

Business Unit: MAC01  
Requisition ID: NEXT  
Requisition Name:  Copy From  
Status: Open  
Budget Status: Not Chkd  
Hold From Further Processing: ☐  
\*Requester: FELTONT  
\*Requisition Date: 20/03/2014  
Origin: ONL  
\*Currency Code: CAD  
Accounting Date: 20/03/2014  
Card Number:   
Expiration Date:   
Use Procurement Card: ☐  
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  
Requester 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 0  
Merchandise Amount 0.00  
Status Open  
Schedule...  
View Printable Version  
View Approvals  
\*Go to ...More...  
Save  
Notify  
Refresh  
Add  
Update/Display  
javascript:submitAction\_win0(document.win0,REQ\_LINE\_WRK\_SCHEDULE\_PB50);  
2:40 PM  
20/03/2014

6. Schedule- enter the **Ship To** 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.

Mosaic

https://epprd.mcmaster.ca/psp/preprd/EMPLOYEE/ERP/c/REQUISITION\_ITEMS.REQUISITIONS.GBL?FolderPath=PORTAL\_ROOT\_OBJECT.EPPO\_PURCHASI

Home | Sign out

McMaster University Mosaic

Home My Profile My Work Support

Maintain Requisitions

Schedule

Business Unit Requisition ID Requisition Date 20/03/2014 Status Approved

Return to Main

Line	Item	Quantity	Price	Merchandise Amount	Due Date	Attention To	Status
1	20000020 TSH Fitzhenry Studios	1.0000	4,300.00	4,300.00	20/03/2014	MECH.ROLAN	Active

Add Ship To Comments

Save Return to Search Previous in List Next in List Notify Refresh Add Update/Display

javascript:submitAction\_win0(document.win0,REQ\_SCHED\_WRK\_DISTRIBUTE...

2:46 PM 20/03/2014

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

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 shows a "Schedule" for a requisition. The requisition details include Business Unit (MAC01), Requisition Date (20/03/2014), Requisition ID (0000001438), and Status (Approved). A table lists the requisition line items, with the first line item (Line 1) highlighted. The line item details include Item (20000020 TSH Fitzhenry Studios), Quantity (1.0000), Merchandise Amt (4,300.00 CAD), and Status (Active). A red arrow points to the "Distribution" icon at the end of the line item. The bottom of the screen shows a "Save" button and a "Return to Search" button.

Step 7.

Line	Item	Quantity	Merchandise Amt
1	20000020 TSH Fitzhenry Studios	1.0000	4,300.00 CAD

Sched	*Ship To	Quantity	Price	Merchandise Amount	Due Date	Attention To	Status
1	010B	1.0000	4,300.00000	4,300.00	20/03/2014	MECH,ROLAN	Active

Buttons: Save, Return to Search, Previous in List, Next in List, Notify, Refresh, Add, Update/Display

8. 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.

**Step 8. a**

**Step 8. b**

Requisition ID 0000001437  
 Line 2  
 Schedule 1  
 Ship To 072\_RECV ST. JOSEPH  
 \*Distribute By Quantity  
 \*Liquidate By Amount  
 SpeedChart Multi-SpeedCharts

Item Status Active  
 Quantity 3.0000 CA  
 Open Quantity 3.0000  
 Merchandise Amt 1,639.20 CAD

**Distributions**

Distrib	Status	Percent	Quantity	Merchandise Amount	GL Unit	Fund	Account	Dept	Program	PC Bus Unit	Project	Activity	Source Type	Affiliate
1	Open	100.0000	3.0000	1,639.20	MACO	85	600001	10178		RFHS	10849939	ELIGIBLE		

OK Cancel Refresh

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



Mosaic

https://epprd.mcmaster.ca/psp/preprd/EMPLOYEE/ERP/c/REQUISITION\_ITEMS.REQUISITIONS.GBL?FolderPath=PORTAL\_ROOT\_OBJECT.EPPO\_PURCHASI

Favorites Main Menu Finance Purchasing Requisitions Add/Update Requisitions Home Sign out

McMaster University Mosaic

Home My Profile My Work Support

Maintain Requisitions **Step 9.**

**Schedule**

Business Unit MAC01 Requisition Date 20/03/2014  
 Requisition ID 0000001438 Status Approved  
[Return to Main Page](#)

Line 1 Item 20000020 TSH Fitzhenry Studios Quantity 1.0000 Each Merchandise Amt 4,300.00 CAD

Schedule Personalize Find View All First 1 of 1 Last

Sched	*Ship To	Quantity	Price	Merchandise Amount	Due Date	Attention To	Status
1	010B	1.0000	4,300.00000	4,300.00	20/03/2014	MECH,ROLAN	Active

[Distribution](#)

Add Ship To Comments

Save Return to Search Previous in List Next in List Notify Refresh Add Update/Display

10. 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 'Home', 'My Profile', 'My Work', and 'Support'. The main content area displays a requisition form for Requisition ID 0000001437. The form includes fields for Requester (JFOSTER), Requisition Date (19/03/2014), Origin (RSH), Currency Code (CAD), and Accounting Date (19/03/2014). A red arrow points to the 'Supplier' tab in the 'Line' section, which is highlighted. The 'Supplier' tab shows a list of suppliers for each line item, with 'CEDARLANE' listed for all items. The 'Amount Summary' section shows a Merchandise Amount of 6,850.80 CAD, Tax of 890.60 CAD, Total Amount of 7,741.40 CAD, and Pre-Encumbrance Balance of 0.00 CAD. The 'Line' section includes a table with columns for Line, Description, Supplier, Supplier Name, and Location. The table lists 7 line items, all with Supplier 'CEDARLANE' and Location 'BURLINGTON'. The bottom of the screen shows a Windows taskbar with various application icons and a system clock indicating 2:59 PM on 20/03/2014.

Line	Description	Supplier	Supplier Name	Location
1	DIF50 Human IFN-	0000009388	CEDARLANE	BURLINGTON
2	HSTA00D Human	0000009388	CEDARLANE	BURLINGTON
3	D6050 Human IL-6	0000009388	CEDARLANE	BURLINGTON
4	ELH-IL1B-1 Human	0000009388	CEDARLANE	BURLINGTON
5	ELH-IL1B-2 Human	0000009388	CEDARLANE	BURLINGTON
6	ELH-IL10-1 Human	0000009388	CEDARLANE	BURLINGTON
7	ELH-IL10-2 Human	0000009388	CEDARLANE	BURLINGTON

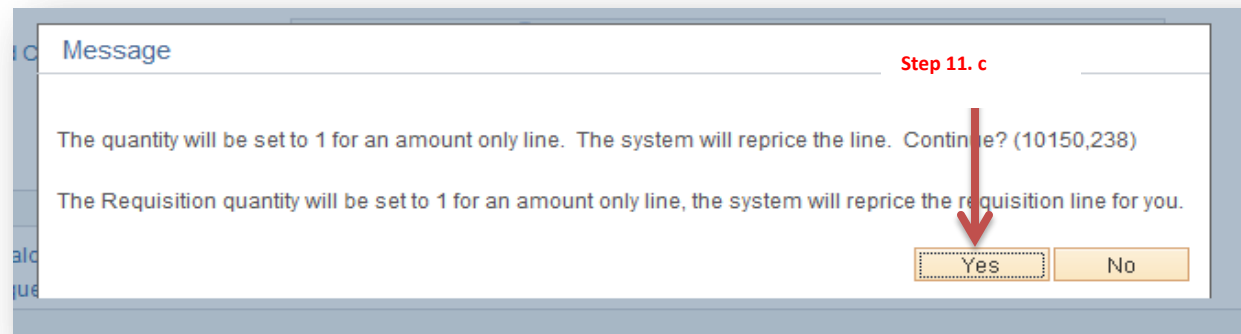
Repeat steps 6 to 10 for each line on your requisition.

11. Requisitions for services, or goods that require payments of multiple invoices (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.**
- Click on the **Attributes** tab
  - Select **Amount Only** so a check mark appears in that field.

The screenshot shows the 'Maintain Requisitions' interface. The 'Requisition' header includes fields for Business Unit (MAC01), Requisition ID (NEXT), Requisition Name (test amount only), Status (Open), Budget Status (Not Chkd), and a checkbox for 'Hold From Further Processing'. The 'Header' section contains fields for \*Requester (CHAPMDJ), \*Requisition Date (2013/12/10), Origin (ONL), \*Currency Code (CAD), and Accounting Date (2013/12/10). The 'Amount Summary' section shows Merchandise Amount (5,000.00 CAD), Tax (650.00 CAD), and Total Amount (5,650.00 CAD). The 'Attributes' tab is selected, and the 'Amount Only' checkbox is checked. Red arrows point to the 'Attributes' tab and the 'Amount Only' checkbox, labeled 'Step 11. a' and 'Step 11. b' respectively.

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"/>		

- c) 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 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**.

Maintain Requisitions

Requisition

Business UnitMAC01

Requisition IDNEXT

Requisition Name [Copy From](#)

StatusOpen

Budget StatusNot Chk'd

☐ Hold From Further Processing

Header

\*RequesterCHAPMDJJosh Chapman

\*Requisition Date2013/12/10

OriginONLOperating

\*Currency CodeCADDollar

Accounting Date2013/12/10

[Requisition Defaults](#)

[Add Comments](#)

[Requisition Activities](#)

Amount Summary

Merchandise Amount5,000.00 CAD

Tax650.00 CAD

Total Amount5,650.00 CAD

[Recalc Gross](#)

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

Personalize

Find

View All

First

1 of 1

Last

Line	Item	Description	Quantity	*UOM	Category	Price	Merchandise Amount	Status
1		test	1.0000	EA	10000000	5,000.0000	5,000.00	Open

12. Adding Attachments- Purchase requisitions always need an attachment(Quote or price list) 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 McMaster University Mosaic system interface. The top navigation bar includes links for Favorites, Main Menu, Finance, Purchasing, Requisitions, and Add/Update Requisitions. The user is logged in as 'Mosaic' and is viewing a Requisition form. The form includes fields for Business Unit (MAC01), Requisition ID (NEXT), and Requisition Name. A red arrow points to the 'Add Comments' link, which is labeled 'Step 12.' The form also includes a 'Header' section with fields for Requester (FELTONT), Requisition Date (19/03/2014), Origin (ONL), Currency Code (CAD), and Accounting Date (19/03/2014). 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 shows a single line item with a quantity of 0.0000. The bottom of the screen shows a Windows taskbar with various application icons and a system clock indicating 3:51 PM on 19/03/2014.

Step 12.

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

Status: Open  
Budget Status: Not Ch'd  
Hold From Further Processing: [Checkbox]

Header  
\*Requester: FELTONT  
\*Requisition Date: 19/03/2014  
Origin: ONL  
\*Currency Code: CAD  
Accounting Date: 19/03/2014

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

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  
Requester Items

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

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

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

Save Notify Refresh Add Update/Display

13. 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.

**\*\*\*FOR RADIOACTIVE PURCHASES, ENTER PERMIT NUMBER IN HEADER COMMENTS\*\*\***

Header Comments

Business Unit: MAC01 Requisition Date: 19/03/2014  
Requisition ID: NEXT Status: Open

\*Sort Method: Comment Time Stamp \*Sort Sequence: Ascending Sort

Comments

Use Standard Comments Comment Status: Active Inactivate

☐ Send to Supplier ☐ Show at Receipt  
☐ Show at Voucher ☐ Approval Justification

Associated Document

Attachment Attach View Delete

From -> REQ MAC01-NEXT

OK Cancel Refresh

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

Comments Box

Who will see comments – select a box see definitions page 16

To add an attachment

Whatever you type in the comment box is visible to what group is selected below the box. (**Who will see comments**)

**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. (This MUST be checked off for Approver to see attachments)

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

#### 14. Adding Attachments: *(See visual page 15)*

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.

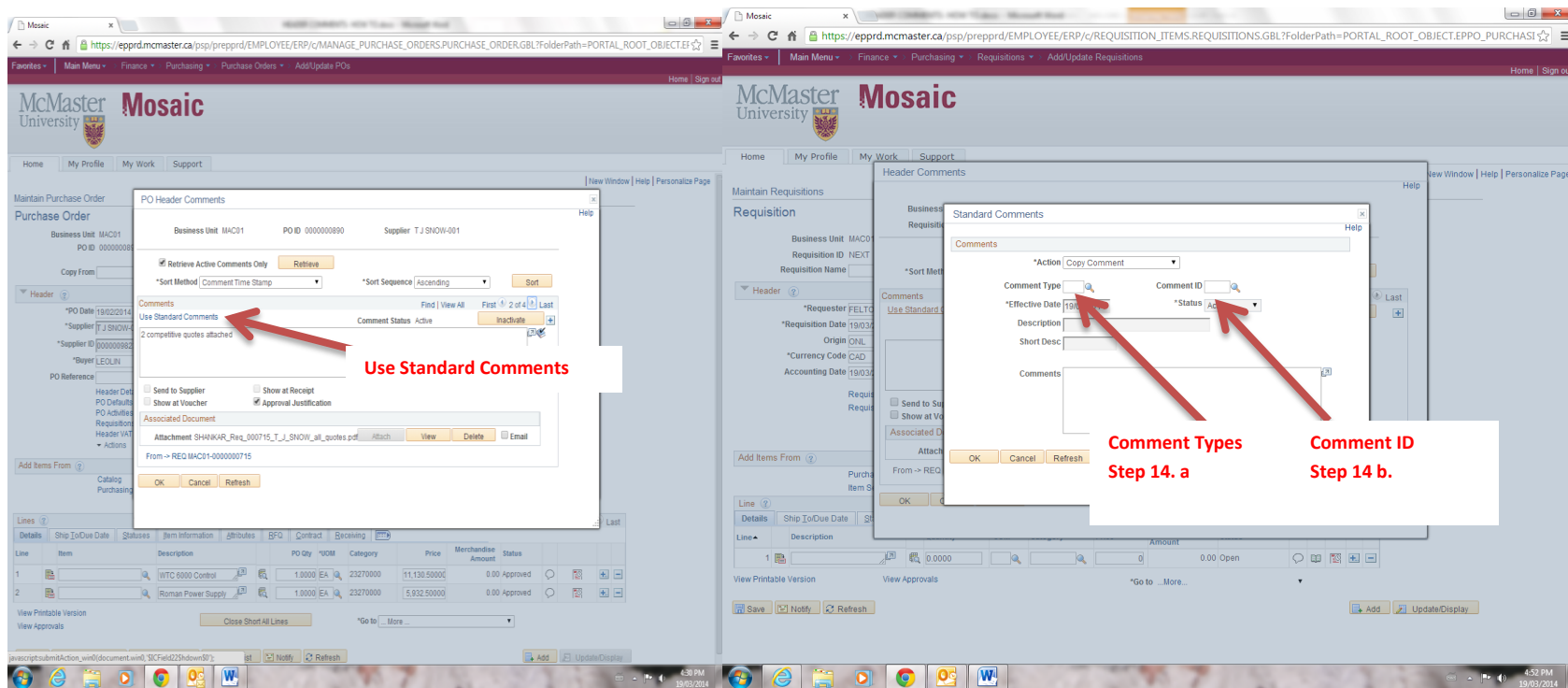
If you want the attachment **Sent to the Supplier** be sure you click off **Email**, otherwise the file won't emailed to the Supplier when the purchase order is dispatched by the system.

*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 tap these need to be added as comments.)**

*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. Step 14. a**

Mosaic

https://epprd.mcmastr.ca/psp/preprd/EMPLOYEE/ERP/c/REQUISITION\_ITEMS.REQUISITIONS.GBL?FolderPath=PORTAL\_ROOT\_OBJECT.EPPO\_PURCHASI

Favorites Main Menu Finance Purchasing Requisitions Add/Update Requisitions Home Sign out

McMaster University Mosaic

Home My Profile My Work Support

Maintain Requisitions

Requisition

Business Unit MAC01  
Requisition ID NEXT  
Requisition Name  
Header  
\*Requester FELTO  
\*Requisition Date 19/03/2014  
Origin ONL  
\*Currency Code CAD  
Accounting Date 19/03/2014

Requisition Details

Standard Comment Type

Look Up Comment Type

SetID: SHARE  
Standard Comment Type: begins with  
Description: begins with

Look Up Clear Cancel Basic Lookup

Search Results

View 100 First 1-5 of 5 Last

Standard Comment Type	Description
CHG	Change Request
DEL	Delivery Instructions
INV	Invoice Instructions
SHP	Shipping Instructions
TNC	Terms and Conditions

OK Cancel Refresh

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

Save Notify Refresh Add Update/Display

javascript:doUpdateParent(document.win0,'#ICRow0');

4:53 PM 19/03/2014

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

15. 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)***

- 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**.

Step 15. b

Step 15. a

Step 15. b

Done	*Due Date	*SeqNum	Comments
<input checked="" type="checkbox"/>	2014/01/21	1	SOLE SOURCE

- 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 contains two side-by-side screenshots of the McMaster University Mosaic system interface. The left screenshot shows the 'Requisition' page with a red arrow pointing to the 'View Approvals' link at the bottom. The right screenshot shows the 'View Approvals' pop-up window with a red arrow pointing to the 'Not Routed' status under 'Requisition Sole Source Approv'.

**Step 15. c**

**Step 15. c**

**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**

16. 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 browser address bar displays the URL: [https://epprd.mcmaster.ca/psp/preprd/EMPLOYEE/ERP/c/REQUISITION\\_ITEMS.REQUISITIONS.GBL?FolderPath=PORTAL\\_ROOT\\_OBJECT.EPPO\\_PURCHASING.EPCO\\_REQUISITIONS.I](https://epprd.mcmaster.ca/psp/preprd/EMPLOYEE/ERP/c/REQUISITION_ITEMS.REQUISITIONS.GBL?FolderPath=PORTAL_ROOT_OBJECT.EPPO_PURCHASING.EPCO_REQUISITIONS.I). The navigation menu includes: Favorites, Main Menu, Finance, Purchasing, Requisitions, and Add/Update Requisitions. The header area features the McMaster University logo and the Mosaic logo. Below the header, there are links for Home, My Profile, My Work, and Support. On the right, there are links for New Window, Help, and Personalize Page.

The main content area is titled "Maintain Requisitions" and "Requisition". It includes a "Business Unit" dropdown set to "UNIVERSITY" and a "Requisition ID" field with a "NEXT" button. A red arrow points to the "Requisition ID" field with the text "Req ID will appear here". There is also a "Requisition Name" field and a "Copy From" button. A checkbox labeled "Hold From Further Processing" is present.

The "Header" section contains several fields: "Requester" (FELTONT), "Requester Info" (FELTON, TRACIE), "Card Number" (dropdown), "Requisition Date" (20/03/2014), "Origin" (ONL), "Operating" (dropdown), "Currency Code" (CAD), "Dollar" (dropdown), and "Accounting Date" (20/03/2014). There are also links for "Requisition Defaults", "Add Comments", and "Requisition Activities".

The "Amount Summary" section shows: "Merchandise Amount" (0.00 CAD), "Tax" (0.00 CAD), and "Total Amount" (0.00 CAD). A "Recalc Gross" button is available.

The "Add Items From" section has tabs for "Purchasing Kit", "Catalog", and "Requester Items".

The "Line" table has columns: Line, Description, Quantity, UOM, Category, Price, Merchandise Amount, and Status. The first line (Line 1) shows a quantity of 0.0000, a price of 0, and a status of 0.00 Open.

At the bottom, there are buttons for "Save", "Notify", "Refresh", "Add", and "Update/Display". A red arrow points to the "Save" button with the text "Step 16.".

17. 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 content area is titled 'Maintain Requisitions' and 'Requisition'. The form displays various fields for requisition details, including Business Unit (MAC01), Requisition ID (NEXT), and Requisition Name. A red arrow points to a magnifying glass icon next to the 'Budget Status' field, which is labeled 'Step 17. (Icon with the magnifying glass)'. The 'Amount Summary' section shows Merchandise Amount, Tax, and Total Amount, all set to 0.00 CAD. The 'Add Items From' section includes options for Purchasing Kit, Catalog, Item Search, and Requester Items. The 'Line' table shows a single line item with a quantity of 0.0000 and a status of 'Open'. The bottom of the screen displays a taskbar with various application icons and a system clock showing 4:01 PM on 20/03/2014.

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

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](https://epprd.mcmaster.ca/psp/preprd/EMPLOYEE/ERP/c/REQUISITION_ITEMS.REQUISITIONS.GBL?FolderPath=PORTAL_ROOT_OBJECT.EPPO_PURCHASING.EPCO_REQUISITIONS.I)

[Favorites](#) | 
 [Main Menu](#) | 
 [Finance](#) | 
 [Purchasing](#) | 
 [Requisitions](#) | 
 [Add/Update Requisitions](#)

Home | Sign out


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[New Window](#) | 
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Maintain Requisitions

### Requisition

Business Unit: MAC01  
 Requisition ID: NEXT  
 Requisition Name:  Copy From

Status: Open  **Step 18. Green checkmark to submit for approval**  
 Budget Status: Not Chkd  
☐ Hold From Further Processing

**Header** ?

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

Card Number:   
 Expiration Date:   
☐ Use Procurement Card

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

**Amount Summary** ?

Merchandise Amount	0.00 CAD	
Tax	0.00 CAD	<a href="#">Recalc Gross</a>
Total Amount	0.00 CAD	

**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...](#)

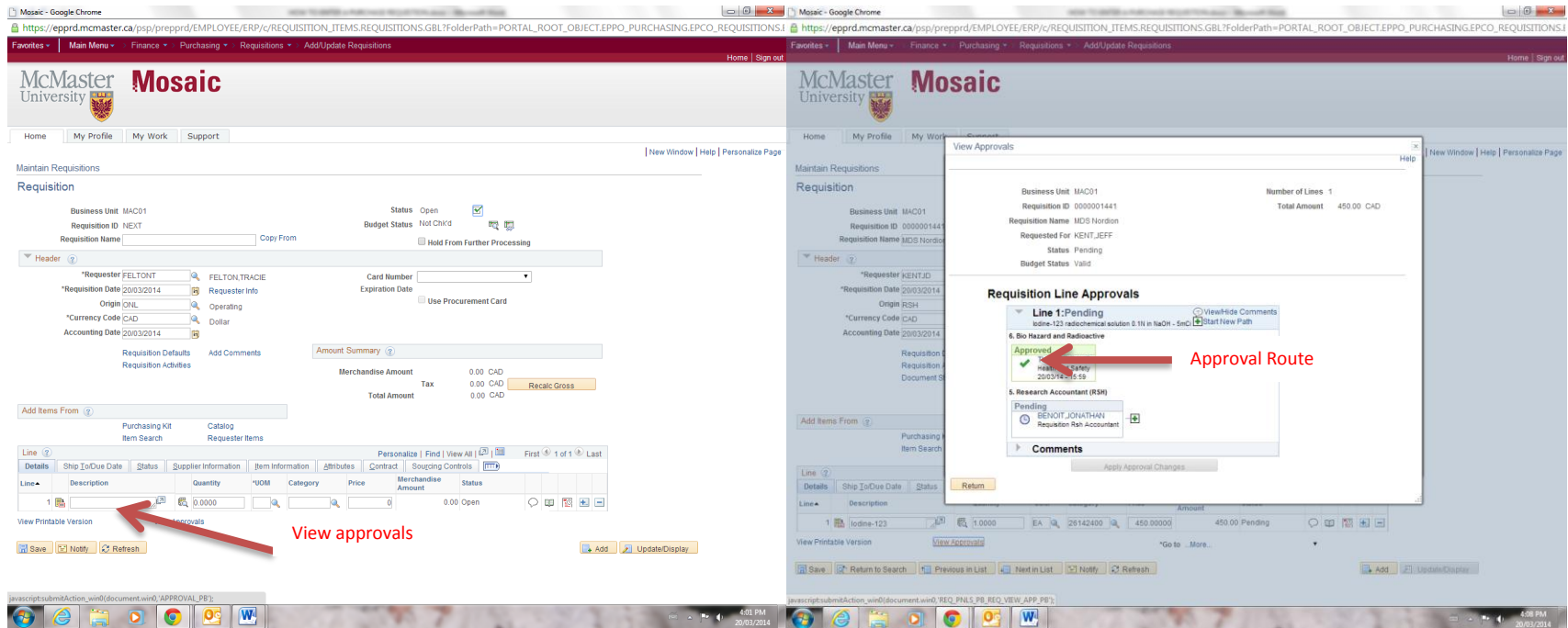
[Save](#) | [Notify](#) | [Refresh](#) | [Add](#) | [Update/Display](#)

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

4:01 PM  
 20/03/2014



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



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*)

*Congratulations you have completed a requisition.*

The flow of the Requisition: Next 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.

