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”. Select “Find an Existing Value” to find a requisition entered previously.

Once opening the requisition screen click on the supplier tab to ensure the supplier is in the PeopleSoft system. If the supplier is not in the system, supplier set-up will need to be requested via this pathway: Finance > Purchasing > Requisitions > Supplier Set-up/Change Request. The 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. This 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.
4. Next enter the Line item description on the “Details” line.
   a) “Item” - leave this field empty.
   b) “Description” - type a description of the item being purchased. If the supplier has provided an item number begin the description with the supplier’s item number.
   c) “Quantity” - this is the number of items being purchased. For services enter quantity of 1.
   d) “UOM” - unit of measure. Most requisitions will have EA (each) as UOM. Click on the magnifying glass to view other options.
   e) “Category” - click on the magnifying glass to view options available. This is the category of goods or services being purchased, not the department making the purchase (example- lab supplies such as beakers should be 4110000 Laboratory & Scientific Equipment, not Research Services).
   f) “Price” - Enter the price without taxes. PeopleSoft calculates the taxes.
To add additional lines, select the “+” button at the end of the line. To remove lines, select the “−” button at the end of the line.
5. Select the “Schedule” icon at the end of the line.
6. Schedule - enter the “Ship To” and “Due Date” here.
   a) “Ship to” - should default to the purchaser’s office location. Other locations can be selected by clicking on magnifying glass.
   b) “Due Date” - select the calendar icon to change the due date. The due date is the date goods should be delivered to your location.
7. Click on the “Distribution” icon at the end of the line.
8. Enter the Chartfield information in the “Distribution” fields.
   a) Only populate the fields that apply to the Chartstring. Click on the magnifying glass next to each field to find the appropriate information and select.
   b) Select “Ok” when finished entering information.
9. On the “Schedule” page, select “Return to Main Page”.
10. Click on the “Supplier Information” tab to select the supplier. If the supplier is not listed, request a supplier setup by navigating to Finance > Purchasing > Requisitions and Selecting Supplier Setup/Change Request.

Click on magnifying glass to find the supplier.
Repeat steps 6 to 10 for each line on the requisition.

11. Requisitions for services, or goods that require payments of multiple invoices (the supplier will be issuing more than one invoice to be paid) should be setup as “Amount Only” Requisitions. **Omit this step if the supplier is issuing only one invoice against the purchase order.**

   a) Click the “Attributes” tab
   b) Select “Amount Only” so a check mark appears in that field.
c) When the prompt message appears select “Yes” to confirm.
Note: the “quantity” field is unavailable for entry as the system has now hardcoded the quantity but the price field is now open. When performing Receipts on this purchase order, receive on price rather than quantity.
12. Adding attachments is a required step. Purchase requisitions always need an attachment added as an approval justification to confirm the goods and/or services have been procured through a process meeting current purchasing policies. Please refer to the current purchasing policy documentation for requirements.

Select “Add Comments” and a new Prompt box will appear.
13. If required, comments can be added next.

Note the comment box is 1 of 1 and selecting the “+” button allows for additional comments to be added. To remove a comment box previously added, select the “Inactivate” button and the comment box will be removed.
Whatever is typed into the comment box is only visible to the group selected below the box as follows:

- “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.

14. Adding Attachments (See visual page 15):

To add attachments select “Attach”. Select “Choose File” to find the file to be attached and select “Upload”. Note: the attachment gets attached to the comment box that is open.

In order for the attachment to be sent to the supplier, “Email” must be selected, 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 them 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 from the dropdown list.
A. Click on the magnifying glass next to “Comment Type” to choose the relevant comment type (see visual on page 18).
B. Once the comment type is chosen, select the “Comment ID” to be used.
C. Select “Ok” and it will be pasted into the main comment box.
D. **For US Orders only:** Select “Shipping Comments” and “Customs” as the “Comment ID”. This action will paste the McMaster customs broker information into the comment box. Be sure to select “Send to Supplier” and click “Email” so it is sent to the supplier with the purchase order.
E. **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 *(Incoterms are not found within the Standard comments - 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, choose the comment ID which will populate in the comments box (Step 14. a).
Routing a Sole/Single Source Form to the AVP of Administration & CFO:

15. Adding a Sole Source form to a requisition:

First, refer to SP01 to see if the order meets the required thresholds: [http://www.mcmaster.ca/bms/policy/purchase/SP-01.pdf](http://www.mcmaster.ca/bms/policy/purchase/SP-01.pdf). For example if the value of the purchase is over $10,000 a Sole Source form would be required if you are unable to obtain two 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 the Sole Source form has been attached to the “Approval Justification” in the comments portion of the requisition. Instructions as listed above on pages 15 and 16 on how to add attachments)
a. Select “Requisition Activities” in the Header.
b. Hypen in the words “Sole Source” under Comments and then select “Done” so a check mark appears. This will route the requisition to the AVP of Administration/CFO for review.
c. The AVP of Administration/CFO will now be listed as one of the approvers on the requisition once the requisition is saved and submitted for approval. To view the routing go to “View Approvals” found within the main page of the requisition. Once “View Approvals” is selected, the name of the AVP of Administration/CFO (D. Henne.) is visible.
Finalizing the requisition:

*It’s important to follow these steps as listed to ensure the requisition is submitted correctly.*

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

16. Select “Save”. A requisition number will be generated next to “Requisition ID”.

![Image of requisition process]

**Step 16.**
17. Select “Budget Check”. The budget check will be performed and budget check status will change from “Pending” to “Approved”.

Step 17. (Icon with the magnifying glass)
18. Select the green checkmark to submit the requisition to be routed to the next approver.

Step 18. Green checkmark to submit for approval
19. Select “View Approvals”.

The approval route is now visible, showing the individuals in the approval process as well as the status of approval.

The requisition is now complete!

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.