

Creating a Requisition using RSS / Research

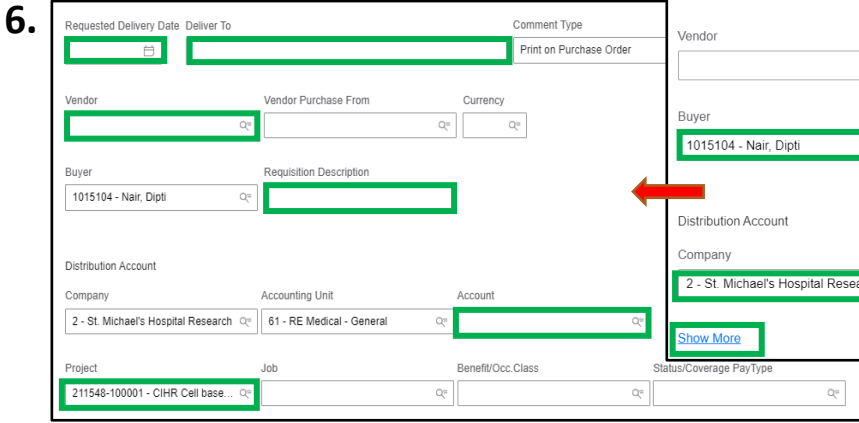
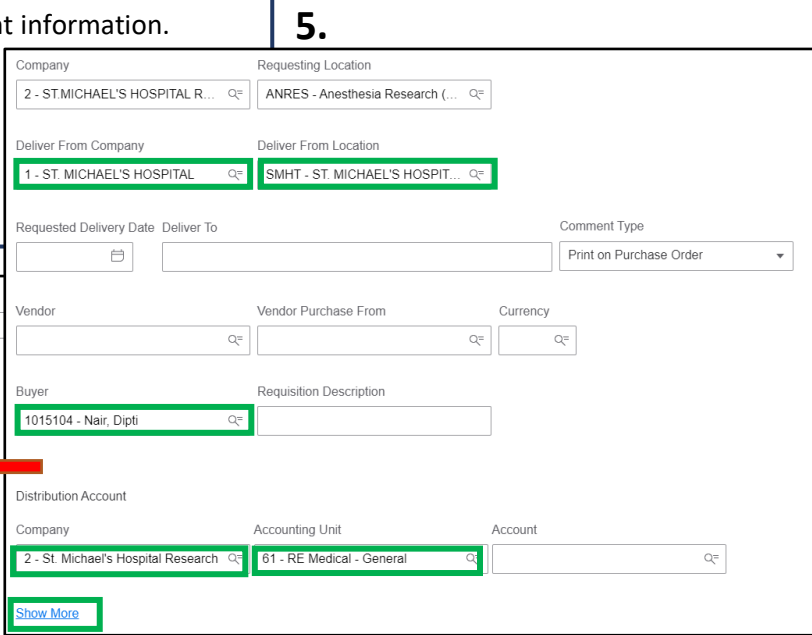
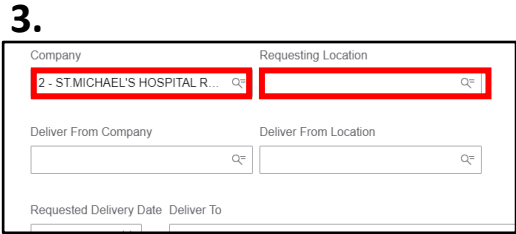
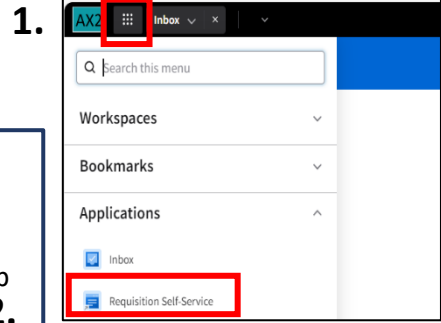


Getting Started

1. Access RSS eReq from UnityNET
<https://unitynet.unity.local/my-employee-experience/manager-tools/purchasing-requisition/>
2. Login to Infor CloudSuite with your regular system username and password.

1. Complete your requisition header

1. Once logged into cloud, you will be directed to click the Navigation Menu (9 dot icon aka waffle), you will then choose **Requisition Self Service** to start creating your requisition.
2. To create a requisition, start by clicking on the **“Profile”** tab at the top right corner.
3. In the new page, fill out the system mandatory fields, **Company and Requesting Location**. When you are set up in RSS eReq you will have a default Company of 2 – St. Michael’s Hospital Research. This will be auto-populated based on your user ID.
4. If you know your **Requesting Location**, you can type it in. Otherwise, you can use the search icon to review a list of all active requesting locations.
5. Once you put in your requesting location, you will see the fields in green defaulted on your screen. The **Accounting Unit** is associated with the Requesting Location specified. You can edit this field to use any of the AUs used by Research. Press the link **“Show More”** to add/display your project code and other important information.
6. The following screen will appear. The fields highlighted with green boxes are potential fields to be completed. Press Create Request at the bottom. **All** requisitions **must** start this way (Catalogue Search, Free Text, etc.).



2. Adding and searching catalogue

1. Press the **Add to Request** tab at the upper right corner.
2. The **Search the Catalog** selection is located in the upper left-hand side of your screen.
3. You can search for an item using INFOR item number, vendor part number, manufacturer part number, brand or description, and press enter.
4. All the results of your search will display. Select the item you want by clicking the tick box, input the quantity, and click the "+" sign.

4.

Item	Quantity / UOM	Cost	Available
<input checked="" type="checkbox"/> SOLN.0.9PCT.NACL.INJ.500ML... Item: 1024750	4 CA - CASE	32.4000	Non Stock

1.

2.

3.

3. Create a free text requisition

1. Press the **Add to Request** tab at the upper right corner.
2. The **Add Special / Service Item** selection is located in the upper left-hand side of your screen.
3. Select the correct option, if you wish to add an Item, an Amount Service, or a Quantity Service. Fill out the mandatory fields: **Description, Item, Quantity, UoM (Unit of Measure), Cost, Vendor** and **Account**.
4. When ordering a free text **Service (Amount or Quantity)**, always create a new requisition (step 1) just for this order.
5. Click **Add to Request**.

3.

For Quantity Service, OVERWRITE the self-populated Vendor Item field, with the serial numbers of the items being repaired

5.

Click Add to Request

1.

2.

4. Submit Requisition

Before you submit your requisition, you can add comments at the **Header** or the **Line level**.

- Header level: comments apply to the entire requisition, **use only for free text Amount Service or Quantity Service**. Click on Add Header Notes, in the upper right-hand side of your screen, and then select the create button at the top right hand corner.
- Line level: comments apply only to that line. Select the view request details button. Select the **Add Line Notes** icon, and then select Create. You can attach a document here (quotes). Click **Submit**.

1.

2.

Line	Item Details	Quantity / UOM	Cost	Total	Status
2	CRINKLE NEST KRAFT PAPER Item: 1024142	2 / EA - EACH	5827.0000	11654.0000	CAD Unreleased
3	PACK POWDER CONC NA... Item: 1033038	1 / CA - CASE	17.0000	17.0000	CAD Unreleased

5. Check requisition status

- On the main screen, press the three dots in the **My Requisitions** screen. The View All box will appear.
- Click on the requisition for which you want to inquire.
- If you click on the dots it will tell you where the requisition stands in the approval queue.

1.

2.

Company	Request Number	Requesting Location	Requisition Description	Vendor	Vendor Name	Creation Date	Requested Delivery Date	Request Total	Status
1	522575	CENT				5/8/2024 2:11:44 PM		0.00	Unreleased
1	522575	CENT				5/6/2024 2:08:36 PM	5/7/2024	21479040.00	Completed
1	522575	CENT				5/6/2024 10:40:55 AM	5/7/2024	300.00	Need

3.

Line	Item Details	Quantity / UOM	Cost	Total	Status
1	BAIR HUGGER Item: BAIR HUGGER	3.00 / EA - EACH	100.0000	300.0000	CAD

Activity Name	Start	End	Action Taken	Status
UserAction7940	2024-05-06 16:15:58	2024-05-07 16:19:33	TimeOut	Completed
UserAction7940	2024-05-07 16:21:38			Started