

CREATING A REQUISITION:

RSS eReq (Requisition Self-Serve) in Infor

Research Training Manual

Last revised: August 29, 2024





PLEASE NOTE:

Items under the following categories **can** be requested through RSS eReq, however they require additional instructions which are listed under the **special cases** section in this manual: rush/urgent orders, services/repairs, minor equipment, after the fact purchase orders and no charge orders.

Items under the following categories **cannot** be requested by the end user through RSS eReq: Standing Orders, Blanket Orders, Service Agreements, Consignment Products, Furniture and goods/services to be charged to TRUST.

Requisitions for Capital Equipment and IT Hardware or Software have special processes and **should NOT** be ordered by the end user using the RSS eReq.

Additional instructions on how to order these items are listed under the **special cases** section in this manual

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STEP 1 – Accessing eReq

Access RSS eReq from UnityNET <https://unitynet.unity.local/my-employee-experience/manager-tools/purchasing-requisition/>

OR

Type in the URL to access Infor CloudSuite production (this will be provided to you on GO LIVE date)

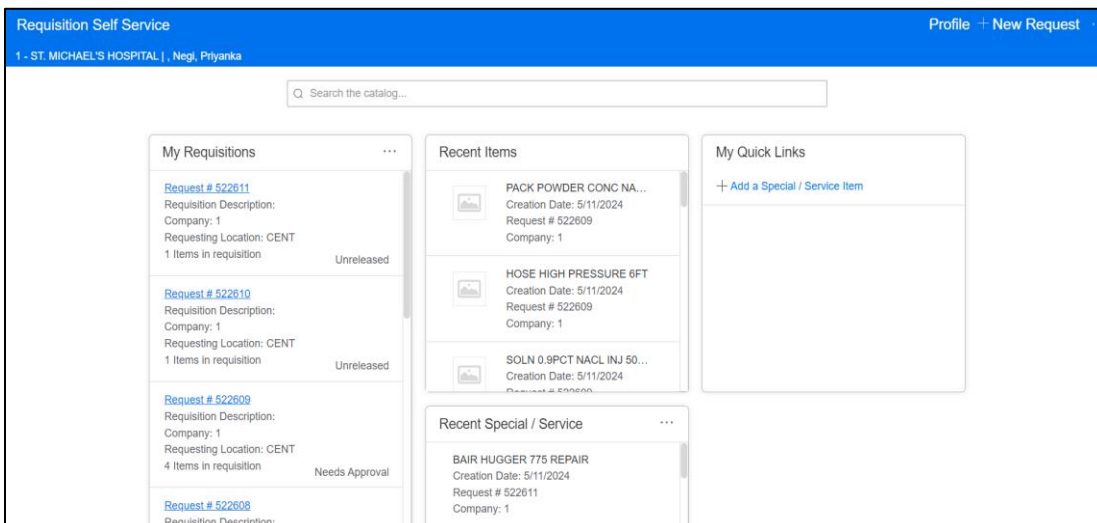


Log into Infor with your **regular system user name and password**

Go to Requisition Self-Serve



This will bring you to the following page



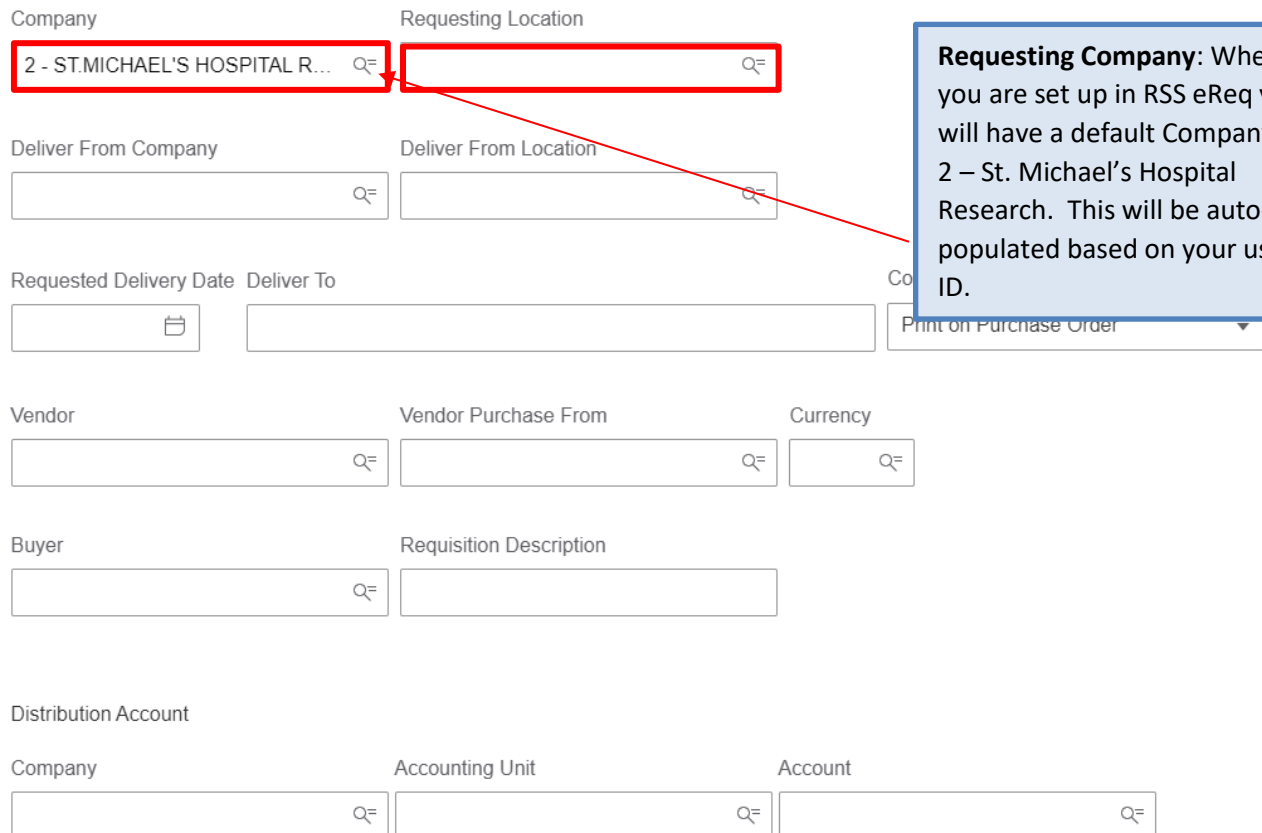
STEP 2 – Setting up your eReq

1. To create a requisition, you should start by clicking on the “**Profile**” tab at the very top row. You will be directed to this screen right when you log in. This is where you will begin setting up your requisition with your information as the requester.



The screenshot shows the top navigation bar of the Requisition Self Service interface. On the left, it says "Requisition Self Service". On the right, there are two tabs: "Profile" (highlighted with a red box) and "New Request" (with a dropdown arrow). Below the navigation bar, the user's name and location are displayed: "1 - ST. MICHAEL'S HOSPITAL | , Negi, Priyanka". Below this is a search bar with the placeholder text "Q Search the catalog..." and a magnifying glass icon.

2. You will be presented with the New Request page. The only **system mandatory** fields to complete are: **Company and Requesting Location.**



The screenshot shows the "New Request" form. The "Company" field is populated with "2 - ST.MICHAEL'S HOSPITAL R..." and the "Requesting Location" field is empty. Both fields are highlighted with a red box. A red arrow points from the "Requesting Company" callout box to the "Requesting Location" field. Other fields include "Deliver From Company", "Deliver From Location", "Requested Delivery Date", "Deliver To", "Vendor", "Vendor Purchase From", "Currency", "Buyer", "Requisition Description", and "Distribution Account" (Company, Accounting Unit, Account). A "Print on Purchase Order" dropdown is also visible.

Requesting Company: 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.

[Show More](#)

Requesting Locations

Requesting Location	Name
ANES	ANESTHESIA - DR. DAVID MAZER
ANRES	Anesthesia Research (653 LKSKI) 211548-100001 abcdefabcdefabcdefabcdefabcdefabc
RL824	KAREN UNG

Requesting Location (RQL): If you know your requesting location (**4-5 digit code**) you can type it in. If **you do not know** your requesting location, you can use the search icon to review a list of all active requesting locations. **The RQL name includes the owner/doctor's name as well**

Note:

Your requesting company and requesting location are required fields and perhaps the most important information when creating a requisition. Your requesting location will not only indicate where your items are to be delivered in the hospital, but is also mapped to an AU (Accounting Unit) and a Project (which is then mapped to the approving manager/director).

Once you put in your requesting location, you will see **the following fields** defaulted on your screen.

Company: 2 - ST.MICHAEL'S HOSPITAL R... Requesting Location: ANRES - Anesthesia Research (...)

Deliver From Company: 1 - ST. MICHAEL'S HOSPITAL Deliver From Location: SMHT - ST. MICHAEL'S HOSPIT...

Requested Delivery Date: [Calendar Icon] Deliver To: [Empty Field] Comment Type: Print on Purchase Order

Vendor: [Empty Field] Vendor Purchase From: [Empty Field] Currency: [Empty Field]

Buyer: 1015104 - Nair, Dipti Requisition Description: [Empty Field]

Distribution Account

Company: 2 - St. Michael's Hospital Research Accounting Unit: 61 - RE Medical - General Account: [Empty Field]

This is the Buyer Number and Name of the Buyer who will process your requisition for direct from supplier products and services

This is the **Accounting Unit** that is associated with the Requesting Location specified. You can edit this field to use any of the following AUs used by Research

- 10 – RE Research Admin
- 20 – RE Research Animal House
- 61 – RE Medical General
- 64 – RE Med Clinical Trials Research
- 66 – RE Oncology
- 71 – RE Mental Health General

[Show More](#)

You should now press the link "Show More" to add/display your project code and other information related to your requisition

The following screen will appear

Requested Delivery Date Deliver To Comment Type

Vendor Vendor Purchase From Currency

Buyer Requisition Description

Distribution Account

Company Accounting Unit Account

Project Job Benefit/Occ.Class Status/Coverage PayType

MIS Account MIS Accounting Unit

[Show Less](#)

Tax Code

Taxable

The fields highlighted with green boxes are potential fields to be completed. (See the field by field explanations below)

Project

Project	Description
<input type="text" value="216093"/>	<input type="text"/>
216093-000001	Research - Vivarium Operatormg-
216093-600001	Vivarium Operating-
216093-600801	Vivarium - Fish Housing Rack-
216093-600802	Blood Gas Analyzer- Dr. Barker-
216093-600803	Lab Air Compressor System-
216093-600901	Operations & Billing Computer-
216093-600902	Business Management System Upg-
216093-600903	RF Business Management System-

In some cases, you may note that your Project Number is shown. It has been defaulted based on the Requesting Location that you selected. However, many projects share requesting locations, so in some cases the field may be blank. If shown, you should validate the project shown to ensure that it is the correct project for your requisition. If blank, you must add your project here. To change or add your project, click on the magnifying glass to the right of the field and selecting the project that you would like to charge

NOTE – Requisitions can reference both catalogued and free text products/services.

Catalogued Product – this is a product that is set up in the Infor Item Master and contains all of the information necessary to order the product e.g. part number, unit of measure, description, price and vendor

Free Text Product/Service – these are products and services that are NOT set up in the Infor Item Master. You can order these in RSS, however, you must supply all of the pertinent information necessary to order the product e.g. part number, unit of measure, description, price

Although the system will let you save this requisition header at this time, it is **Highly Recommended** to complete the following fields before creating your request: **Requested Delivery Date, Requisition Description and Account.**

Requested Delivery Date: Insert a date when you would like receive the items. This date should be at least one day after today's date (for rush requirements please see the RUSH order section)

Requisition Description: This field allows you to create a personalized title for your requisition. For example, if you are ordering office supplies for your unit you might create the description "Office Supplies." (up to 30 characters). You can also use this field to reference the requisition to any other number that you may use in your own department

NOTE - It is very important to set a default account on the requisition header, as otherwise when you are ordering catalogued products used by the rest of the hospital, accounting will default to normal hospital accounts which may not be authorized for your AU. This will also save YOU time if you have multiple free text lines for your requisition

Account: Research uses three primary accounts to charge goods and services that will be ordered through RSS eReq. Depending on the nature of the products or services that you are ordering, you should choose one of the following

5485003300 - Supplies – Research – supplies that Research uses to conduct its work

5710003300 - External Equipment Maintenance – Service and Repairs to Research Equipment by outside vendors

5765003300 - Minor Equipment - non-capital (<\$5K) equipment that Research uses to conduct its work

It is **optional** to complete the following fields before creating your request: **Deliver to and Vendor.**

Deliver To: This field is for additional delivery information concerning the requesting location. Your requesting location provides information as to which unit, floor and room your items need to be delivered to within the Hospital. Here, you can be more specific on who it is going to (i.e., "attention to [name] x1234" or any special protocol or delivery instructions).

Vendor: If you plan on adding multiple free text items from the same vendor to your requisition, if you select the vendor here on the header, it will auto-populate when you add the free text items later in the process

The following screen represents a completed requisition header form

Deliver From Company: 1 - ST. MICHAEL'S HOSPITAL

Deliver From Location: SMHT - ST. MICHAEL'S HOSPIT...

Requested Delivery Date: 8/27/2024

Deliver To: Advise Heidi on delivery x4342

Comment Type: Print on Purchase Order

Vendor: 1242 - VWR INTERNATIONAL CO.

Vendor Purchase From: [Empty]

Currency: [Empty]

Buyer: 1015104 - Nair, Dipti

Requisition Description: Reagents for ABC lab Augus

Distribution Account

Company: 2 - St. Michael's Hospital Research

Accounting Unit: 61 - RE Medical - General

Account: 5485003300 - Supplies - Research

Project: 211548-100001 - CIHR Cell base...

Job: [Empty]

Benefit/Occ.Class: [Empty]

Status/Coverage PayType: [Empty]

MIS Account: [Empty]

MIS Accounting Unit: [Empty]

[Show Less](#)

Tax Code: [Empty]

Taxable

Create Request

Added a requisition delivery date to assist buyer in placing the PO

Added deliver to information to assist Logistics with your delivery

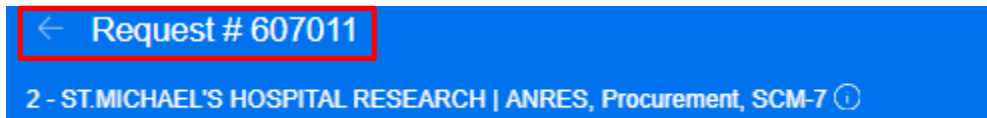
Added a Vendor – useful if all my free text products are from this vendor

Added a requisition description. This will make it easier to find my requisition on the home page

Added a default account. This will be referenced by all items on the requisition and ensure that preferred accounts for Research are applied to catalogued and free text products

You can then press Create Request to create your requisition

You will now note that you have a requisition number in the top left hand corner of the screen



You can now press the add to request button to add items and comments to your requisition

This completes Step 2 - Setting up your eReq

STEP 3 – Selecting your items

There are two ways to identify items to include on your eReq: **Search Catalog** or by using **Freetext**.

You should always search for the item in Catalog first, as all of the accounting information is defaulted and filled in on your order, as well as price and price unit of measure. This information **must be provided by you** manually when creating a Freetext order line. There is also more room for error when ordering with Freetext which could result in delays in processing your order by the buyer.

Search catalog provides you access to all items currently set up for ordering **within Unity Health**. This includes items set up in the material master and ALL products that are under contract. Remember, if you cannot locate your product using Search Catalog, you have the option to Freetext the item into the requisition.

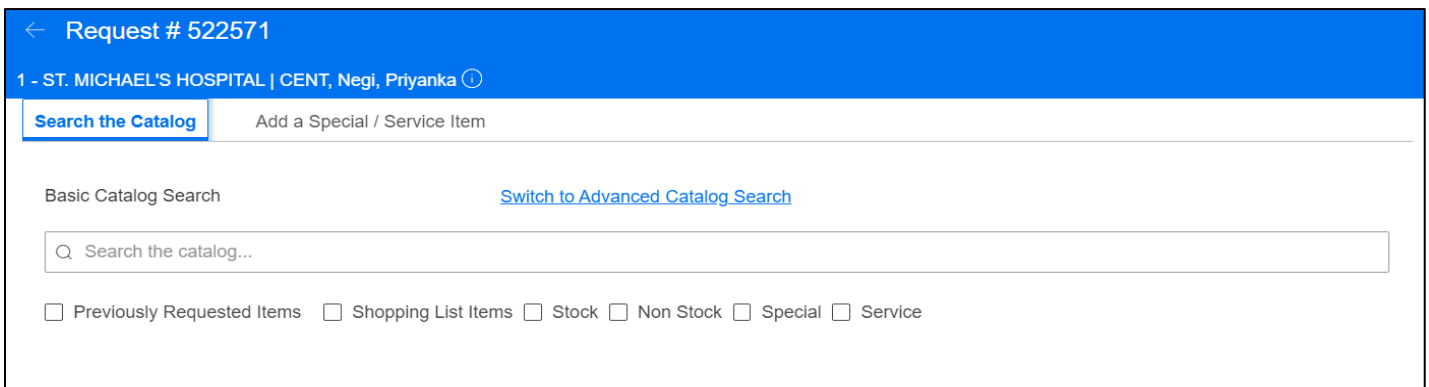
Search by Catalog

1. The “**Search the Catalog**” selection is located in the upper left-hand side of your screen. Here, you can find items using the basic catalog search area (there is no need to use Advanced Catalog Search or the tick boxes below). You can search for an item using any of the following information: INFOR item number, vendor part number, manufacturer part number, brand or description. Searching by Infor Item number is by the far easiest route.

Press the Add to Request



The following Screen will appear.




Note: when you search in the catalogue, the system would not know if you have input an INFOR number, vendor part number, manufacturer part number, brand or description, it will just search your input everywhere on the catalogue database. This means that you may have several results back, where, for example, an Infor number that you have entered is part of another item's vendor part number. By clicking on the description of the item, you can check if it is what you are looking for.

Let's search for the Infor number 1024750. Simply type the number into the search section and press enter.

The screenshot shows a search interface for 'Request # 522571' at 'ST. MICHAEL'S HOSPITAL | CENT, Negi, Priyanka'. The search bar contains '1024750' and is highlighted with a red box. Below the search bar are several filter checkboxes: 'Previously Requested Items', 'Shopping List Items', 'Stock', 'Non Stock', 'Special', and 'Service'.

The following screen will appear with your item's information

The screenshot shows the search results for '1024750'. The search bar still contains '1024750'. Below the search bar are the same filter checkboxes. A table displays the search results with the following columns: 'Item', 'Quantity / UOM', 'Cost', and 'Available'. The first row shows the item 'SOLN 0.9PCT NAACL INJ 500ML...' with a quantity of '1' and a cost of '32.4000'. The item name is highlighted with a red box and an arrow pointing to it from the text below.

Item	Quantity / UOM	Cost	Available
<input type="checkbox"/>  SOLN 0.9PCT NAACL INJ 500ML... Item: 1024750	1 / CA - CASE	32.4000	Non Stock +

There are a number of things to note on this screen

You can expand the description by clicking on it. This will give you're the full description in the system as well as the Vendor Name and Number

Request # 522571

1 - ST. MICHAEL'S HOSPITAL | CENT, Negi, Priyanka

[Search the Catalog](#) Add a Special / Service Item

[< Back to Search Results](#)

SOLN 0.9PCT NAACL INJ 500ML
SOLUTION 0.9 PERCENT NAACL INJ 500ML

Quantity: 1 / UOM: CA - CASE Cost: 32.4000 Currency: CAD Cost Option: Cost Required

Vendor: 150 - BAXTER CORP Vendor Purchase From:

Request # 522571


1 - ST. MICHAEL'S HOSPITAL | CENT, Negi, Priyanka

[Search the Catalog](#) Add a Special / Service Item


Basic Catalog Search [Switch to Advanced Catalog Search](#)

Q 1024750

Previously Requested Items Shopping List Items Stock Non Stock Special Service

Item	Quantity / UOM	Cost	Available
<input type="checkbox"/>  SOLN 0.9PCT NAACL INJ 500ML... Item: 1024750	1 / CA - CASE	32.4000	Non Stock

★ If the item is under contract it is indicated with a star. If you hover over this symbol, it will give you details of the contract.

You can get the manufacturer part number by hovering over the symbol 

If the item is a stores stock item it is indicated as stock with stock on hand availability. You can still order the stock item even if its availability is zero (may just be backordered).

2. Adding items to your requisition.

Request # 522571


1 - ST. MICHAEL'S HOSPITAL | CENT, Negi, Priyanka

[Search the Catalog](#) Add a Special / Service Item

Basic Catalog Search [Switch to Advanced Catalog Search](#)

Q 1024750

Previously Requested Items Shopping List Items Stock Non Stock Special Service

1 Selected		Compare selected items	Add to Shopping List	Add to Request
Item	Quantity / UOM	Cost	Available	
<input checked="" type="checkbox"/>  SOLN 0.9PCT NAACL INJ 500ML... Item: 1024750	2 / CA - CASE	32.4000	Non Stock	<input type="checkbox"/>

Now you can add an item to your requisition by clicking the item's tick box.

Quantities are defaulted to "1" but you can input your own specific quantity into the box

Once you are satisfied, click the "+" sign to add the item to your requisition.

The item will then appear on your requisition on the right-hand side of your screen.

Request # 522571


1 - ST. MICHAEL'S HOSPITAL | CENT, Negi, Priyanka

[Search the Catalog](#) Add a Special / Service Item

Basic Catalog Search [Switch to Advanced Catalog Search](#)

Q 1024750


Previously Requested Items Shopping List Items Stock Non Stock Special Service

1 Selected		Compare selected items	Add to Shopping List	Add to Request
Item	Quantity / UOM	Cost	Available	
<input checked="" type="checkbox"/>  SOLN 0.9PCT NAACL INJ 500ML... Item: 1024750	2 / CA - CASE	32.4000	Non Stock	<input type="checkbox"/>

Tax Total 8.42

Request Total 73.22 CAD

1 Items within this Request

 SOLN 0.9PCT NAACL INJ 500ML 64.8000
1024750
Cost: 32.4000 CAD
Quantity: 2 CA

[View Request Details](#)

[Submit Request](#)

[Delete Request](#)

[Notes](#)

Let's add another item to the requisition. This time let's look using a Vendor Part Number (VPN) CMI-0100-PNX. Simply type the VPN into the search bar and hit enter

Request # 522571

Search the Catalog Add a Special / Service Item

Basic Catalog Search [Switch to Advanced Catalog Search](#)

Previously Requested Items Shopping List Items Stock Non Stock Special Service


If the item is in the catalogue, the item will appear (see below).

Request # 522571

Search the Catalog Add a Special / Service Item

Basic Catalog Search [Switch to Advanced Catalog Search](#)

Previously Requested Items Shopping List Items Stock Non Stock Special Service

Item	Quantity / UOM	Cost	Available
<input type="checkbox"/>  HOSE HIGH PRESSURE 6FT Item: 1024142	<input type="text" value="1"/> / EA - EACH	5827.0000	Non Stock +

To add the item to your order, follow the same procedure of ticking the box, adjusting your quantity if necessary and pressing the + button to add the item to your requisition

Request # 522571

Search the Catalog Add a Special / Service Item

Basic Catalog Search [Switch to Advanced Catalog Search](#)

Q CMI-0100-PNX

Previously Requested Items Shopping List Items Stock Non Stock Special Service

1 Selected		Compare selected items	Add to Shopping List	Add to Request
Item	Quantity / UOM	Cost	Available	
<input checked="" type="checkbox"/> HOSE HIGH PRESSURE 6FT Item: 1024142	<input type="text" value="2"/> / EA - EACH	5827.0000	Non Stock	<input type="button" value="+"/>

Once again the item will be added to your order on the right hand side

Request # 522571

Search the Catalog Add a Special / Service Item

Basic Catalog Search [Switch to Advanced Catalog Search](#)

Q CMI-0100-PNX

Previously Requested Items Shopping List Items Stock Non Stock Special Service

1 Selected		Compare selected items	Add to Shopping List	Add to Request
Item	Quantity / UOM	Cost	Available	
<input checked="" type="checkbox"/> HOSE HIGH PRESSURE 6FT Item: 1024142	<input type="text" value="2"/> / EA - EACH	5827.0000	Non Stock	<input type="button" value="+"/>

Tax Total 1523.44

Request Total 13242.24 CAD

2 Items within this Request

- HOSE HIGH PRESSURE ... 11654.0
1024142
Cost: 5827.0000 CAD
Quantity: 2 EA
- SOLN 0.9PCT NAACL INJ 500ML 64.8000
1024750
Cost: 32.4000 CAD
Quantity: 2 CA

Now let's look for vendor part number 412303

Request # 522571

1 - ST. MICHAEL'S HOSPITAL | CENT, Negi, Priyanka

Search the Catalog Add a Special / Service Item

Basic Catalog Search [Switch to Advanced Catalog Search](#)

Q 412303

Previously Requested Items Shopping List Items Stock Non Stock Special Service

Item	Quantity / UOM	Cost	Available
<input type="checkbox"/> E-TEST CEFTRIAXONE PK30 Item: 1004953	1 / PK30 - PAC...	105.0000	Non Stock
<input type="checkbox"/> ADAPTED IS/DEF 1 EA Item: 18 412303	1.00 / EA - EACH	20.0000	Special

Two selections showed up because they have 412303 contained somewhere in their information record.

If you clicked on the first item's description, you would see in the details that it's vendor part number in 412303

Product Details

Item Number: 1004953
Item Type: Non Stock
Cost Code: Contract
Contract: 838
Contract Line: 5
Contract Priority: 1
Preferred Contract: No
Vendor: 173 - BIO MERIEUX CANADA INC
Vendor Item: 412303

Manufacturer Details

Name: BIO MERIEUX CANADA INC.
Code: BMX
Division:
Number: 412303
GTIN:

The second product also contains that same vendor part number. However, you will note that, instead of an Infor Item Number, it displays the "Item: 18-412303" and shows as "special" under the available column. This means that it is an item **that is under contract**, but has not been assigned an **Infor Item Number**. You can select and add this item as you normally would e.g. tick the box, adjust your quantity and click the "+" sign to add the item to your requisition. As always, the item will then appear on your requisition on the right-hand side of your screen.

Now let's search for an item based on a description. Let's look for the word "powder"

Request # 522571

Search the Catalog Add a Special / Service Item

Basic Catalog Search [Switch to Advanced Catalog Search](#)

Q powder

Owing the use of 'Powder' in many descriptions in the database this search may take longer and will likely produce many results.

Request # 522571

Search the Catalog Add a Special / Service Item

Basic Catalog Search [Switch to Advanced Catalog Search](#)

Q powder

Previously Requested Items Shopping List Items Stock Non Stock Special Service

Item	Quantity / UOM	Cost	Available
<input type="checkbox"/> GLOVE EX NITR PF LF EXTCF MED... Item: 1022251	1 / EA - EACH	0.5437	93.0000 EA Stock
<input type="checkbox"/> GLOVE EX NITR PF LF EXTCF LRG... Item: 1022252	1 / EA - EACH	0.5429	323.0000 EA Stock
<input type="checkbox"/> POWDER NEUTRAL POLYMER GELS... Item: 1003862	1 / BX1C - BO...	17.5000	Non Stock
<input type="checkbox"/> STOMA POWDER Item: 1006001	1 / EA - EACH	0.0000	Non Stock

<input type="checkbox"/> POWDER PURAMINO+ 454G... Item: 1022105	1 / CA06 - CAS...	29.4800	Non Stock
<input type="checkbox"/> POWDER SPIT UP THKN 629G Item: 1022106	1 / CA06 - CAS...	50.4400	Non Stock
<input type="checkbox"/> GLOVE NITRILE BLACK PF XL... Item: 1024083	1 / CA1M - CA...	288.0900	Non Stock
<input type="checkbox"/> GLOVE EX NITR PF LF SM 3MIL... Item: 1020394	1 / CA - CASE	0.0000	Non Stock

< < > >

You can use the page advance command to look at all of the items that were returned.

You can also add detail to your description to narrow the search. Let's add "conc" to the description (for concentrate) to get more specific results.

Request # 522571
1 - ST. MICHAEL'S HOSPITAL | CENT, Negi, Priyanka

Search the Catalog Add a Special / Service Item

Basic Catalog Search [Switch to Advanced Catalog Search](#)

Q powder conc

This narrowed the search down to one item.

Request # 522571
1 - ST. MICHAEL'S HOSPITAL | CENT, Negi, Priyanka

Search the Catalog Add a Special / Service Item

Basic Catalog Search [Switch to Advanced Catalog Search](#)

Q powder conc

Previously Requested Items Shopping List Items Stock Non Stock Special Service

Item	Quantity / UOM	Cost	Available
<input type="checkbox"/> PACK POWDER CONC NAHCO3-720GM/... Item: 1033039	1 / CA - CASE	17,0000	Non Stock

If this is the correct product you can add it to your requisition by checking the box on the left, adjusting your quantity, and clicking the + sign on the right hand side of the screen. This will add the item to your requisition as displayed in the box on the right hand side of the screen

Request # 522571
1 - ST. MICHAEL'S HOSPITAL | CENT, Negi, Priyanka

Search the Catalog Add a Special / Service Item

Basic Catalog Search [Switch to Advanced Catalog Search](#)

Q powder conc

Previously Requested Items Shopping List Items Stock Non Stock Special Service

1 Selected [Compare selected items](#) [Add to Shopping List](#) [Add to Request](#)

Item	Quantity / UOM	Cost	Available
<input checked="" type="checkbox"/> PACK POWDER CONC NAHCO3-720GM/... Item: 1033039	1 / CA - CASE	17,0000	Non Stock

Tax Total 1523.44
Request Total 13259.24 CAD
3 Items within this Request

- [PACK POWDER CONC NAH...](#) 17,0000
1033039
Cost: 17,0000 CAD
Quantity: 1 CA
- [HOSE HIGH PRESSURE ...](#) 11654.0000
1024142
Cost: 5827,0000 CAD
Quantity: 2 EA
- [SQLN 0.9PCT NACL INJ 500ML](#) 64,8000
1024750
Cost: 32,4000 CAD
Quantity: 2 CA

[View Request Details](#)
[Submit Request](#)
[Delete Request](#)
[Notes](#)

TIP - If you do not find your item on your first attempt, please try amending your search criteria. It is usually best to start small and add detail. For example, if you are searching using a vendor part number, instead of entering the whole number e.g. WA-02678-100, try putting a part of the part number e.g. "2678" to see what comes up. Similarly, if using description to search, try "NACI" instead of the entire description "PACK POWDER CONC NAHCO3-720GM/NACI-1.2KG"

Now let's look for an item description "nacid"

Request # 522571
1 - ST. MICHAEL'S HOSPITAL | CENT, Negi, Priyanka

Search the Catalog Add a Special / Service Item

Basic Catalog Search [Switch to Advanced Catalog Search](#)

Q nacid

Previously Requested Items Shopping List Items Stock Non Stock Special Service

Item	Quantity / UOM	Cost	Available
<input type="checkbox"/> TUBE BLD BUFF-NACIT 13X75MM... Item: 1024740	1 / EA - EACH	0.1019	0.0000 EA Stock
<input type="checkbox"/> SOLUTION CONC EXTRCRPRL NACIT/... Item: 1031856	1 / CA02 - CAS...	137.0300	Non Stock
<input type="checkbox"/> TUBE VAC COAG NACIT BLU 4.5ML... Item: 1011079	1.0000 / CA10 - CAS...	0.0000	Non Stock

You will note that **one** of the items show here has the cost shown in white and **not grey**. This means that, while the item is in the INFOR item master catalogue, **it is not set up to be purchased for your company** e.g. hospital. **DO NOT SELECT one of these items in RSS eReq. If you want to order this product, contact your buyer to get it set up for your hospital. Once set up you can order this product normally.** For the purposes of this demonstration, we will **NOT** add any of the above items.

If you cannot locate the product you're looking for in Search Catalog, you can now proceed to add to your requisition using the freetext functionality described in the next section.

Create a Freetext Item for your requisition

Reminder: Please review the special cases for items under the following categories: rush/urgent orders, services/repairs, minor equipment, after the fact purchase orders and no charge orders.



The freetext capability allows you to use electronic requisitioning, instead of a paper/PDF requisition as the vehicle to create and gain approval for your requisition items, even when they are not in the INFOR catalog.

Note – in order for your order to be processed quickly and without delay by your buyer, it is important that you include as much information as possible.

The following fields are **MANDATORY** (system will not process the order in the absence of this data):

Description – Please provide the best description of the item available. If you've googled the item, the description from the internet would be excellent. If you have an empty box from the used product, take the description from there. The description can only contain a maximum of 30 characters.

Item – Fill this field with the Vendor's Part Number.

Quantity – input the quantity of the product that you would like to purchase, stated in terms of the unit of measure identified below

UoM (Unit of Measure) – Select from the list of units of measure provided in the drop down table

Cost – Provide a per unit price/cost related to the unit of measure provided above. NOTE - If you have been provided a **quote from the vendor**, please attach it to the requisition using the attachment functionality (see page 28)

Vendor – Select from the list of vendors (vendor numbers) provided in the drop down. You can search by name, **NOTE- you cannot write in a vendor if it is not in the system (per the identified process, request your buyer to set up any vendors that you need that are not in the system)**

Account – Select from the list of 10 digit accounts from the drop down list. To help you to select one, if you know of a similar product, search the catalog for that product and use the account shown for it. If you have problems identifying the appropriate account, please contact your financial business partner.

The following fields are **OPTIONAL**. They may assist the buyer in placing your order, but are not necessary to process your order

Currency Code – Currencies are provided in the drop down. If your quote is in US\$, you can indicate it here, but not mandatory.

Manufacturer - Select from the list of manufacturers (manufacturer numbers) provided in the drop down.

Manufacturer Number - Fill this field with the Manufacturer's Part Number for this product

Tax Code – Select from the drop down list and select the appropriate Tax Code

NOTE – you cannot order freetext against the Mohawk Shared Services Vendor (22000)

Example of the blank Special/Service screen

Search the Catalog [Add a Special / Service Item](#)

Add a Special or Service Item Add to Request

Add Item Add Amount Service Item Add Quantity Service Item

Item Description *

Item * Vendor Item

Quantity * / UOM * Cost Currency Cost Option

Requested Delivery Date Deliver To

Vendor Vendor Purchase From

Manufacturer Manufacturer Number

Distribution Account

Company	Accounting Unit	Account
<input type="text" value="1 - St. Michael's Hospital"/>	<input type="text" value="713501525 - ENT Clinic - 8C"/>	<input type="text"/>

[Show More](#)

Deliver From Company Deliver From Location

Tax Code

Taxable

Notes

Normal Text | B | U | S | A | | | | |

Enter notes here...

File Attachment

Add to Request

To help you to complete your freetext requisition, the following drop down boxes are available.

Select a Unit of Measure using the drop down search function

UOM *

You can select from the list or search using "description and "contains e.g. "pack" or "box"

Valid Units Of Measure

UOM	Description
B01K	BOTTLE OF 100,000
B05K	BOTTLE OF 500,000
B105	BOTTLE OF 105
B110	BOTTLE OF 110
B112	BOTTLE OF 112
B115	BOTTLE OF 115
B120	BOTTLE OF 120

Cancel

Select a Vendor using the drop down search function

Vendor

You can select from the list or search using "name and "contains e.g. "Stryker"

Vendors

Vendor	Name	Search Name	Has Locations	Vendor Status
3	926316 ONTARIO INC._	926316 ONTARIO INC.		Active
7	TOPCON CANADA INC.	TOPCON CANADA INC.		Active
10	ABBOTT LABORATORIES CO	ABBOTT LABORATORIES CO	*	Active
11	ABELL PEST CONTROL INC	ABELL PEST CONTROL INC		Active
15	ACART EQUIPMENT LTD	ACART EQUIPMENT LTD		Active
19	ACCONTEMP	ACCONTEMP		Active

Select an account using the drop down search function

Account 

Account

Account	Description
111106110	Cash on Hand for Deposit
111106111	Cash on Hand - Coinage
111106112	Cash on Hand - Change Machine Float
111106113	Cash - CMEPP
111106133	TEST
111111111	Test Cash Account
1111206110	Partly Cash General

< << >> >

Cancel

You can select from the list or search using "description" and "contains e.g. "General"

Example of an item free text requisition with all mandatory input.

Search the Catalog [Add a Special / Service Item](#)

Add a Special or Service Item

Add Item Add Amount Service Item Add Quantity Service Item [Add to Request](#)

Item Description *

Item * Vendor Item

Quantity * UOM * Cost Currency Cost Option

Requested Delivery Date Deliver To

Vendor Vendor Purchase From

Manufacturer Manufacturer Number

Distribution Account

Company	Accounting Unit	Account
<input type="text" value="1 - St. Michael's Hospital"/>	<input type="text" value="713501525 - ENT Clinic - BC"/>	<input type="text" value="5460603100 - M&S - General"/>

[Show More](#)

Deliver From Company Deliver From Location

Tax Code

Taxable

Notes

Normal Text | B | U | S | A | | | |

Enter notes here...

File Attachment

[Add to Request](#)

Vendor Item self populates when you key the VPN in the Item field

Click the Add to Request button to add this item to your requisition

The item will then appear on your requisition lines on the right-hand side of your screen.

Request # 522571

1 - ST. MICHAEL'S HOSPITAL | CENT, Negi, Priyanka

Search the Catalog [Add a Special / Service Item](#)

Add a Special or Service Item

Add Item Add Amount Service Item Add Quantity Service Item

Item Description *

Item * Vendor Item

Quantity * UOM * Cost Currency Cost Option

Requested Delivery Date Deliver To

Vendor * Vendor Purchase From

Manufacturer Manufacturer Number

Add to Request

Tax Total 1526.04
Request Total 13606.84 CAD
5 Items within this Request

		ComfortGel SE Stretcher Ser... # 23654 Cost: 162.5000 CAD Quantity: 2.00 EA	325.0000
		SOLN 0.9PCT NAACL INJ 500ML # 1024750 Cost: 32.4000 CAD Quantity: 2 CA	64.8000
		ADAPTER IS4/DF4 1 EA # 18 412303 Cost: 20.0000 CAD Quantity: 1.00 EA	20.0000
		PACK POWDER CONC NAH... # 1033039 Cost: 17.0000 CAD Quantity: 1 CA	17.0000
		HOSE HIGH PRESSURE ... # 1024142 Cost: 5827.0000 CAD Quantity: 2 EA	11654.0000

View Request Details

Submit Request

Delete Request

STEP 4 - Submitting your requisition

Before you submit your requisition you may wish to add comments that will assist in the processing, approval and delivery of your requisition

Comments can be added at the Header or the Line level. Comments entered at the Header level apply to the entire requisition e.g. includes all of the items shown on the requisition, whereas comments at the line level apply only to that line.

1. If you would like to add comments that will apply to your entire requisition, you can do so in the “**Add Header Notes**” tab (comments for the vendor with reference to a specific product are NOT to be added here).

Request # 522600 Profile Add to Request + New Request ...

1 - ST. MICHAEL'S HOSPITAL | CENT, Negi, Priyanka

<Add More Items
0 Items within this Request

Refresh Add Header Notes ...

Line	Item Details	Quantity / UOM	Cost	Total	Status
Tax Total					0.00 CAD
Request Total					0.00 CAD

Submit

2. Select the create button at the top right hand corner

Comments for Requisition 522600 in Company 1

Title	Comment Type	Attachment
-------	--------------	------------

3. The following screen will appear

Create Comment

Company: ST. MICHAEL'S HOSPITAL (1) Requisition: 522571

Print On Internal Documents Print On Receiving Document Print On Requisition

Print On Purchase Order Print On Pick List Display Only

Print On Purchase Order Trailer Print On Delivery Ticket Invoice Comments

Title * File

The screen will default to Print on Purchase Order.

Select the view request details button to allow you to add comments by line

Line	Item Details	Quantity / UOM	Cost	Total	Status
2	HOSE-HIGH PRESSURE GET Item: 1024142	2 / EA - EACH	5827.0000	11654.0000	CAD Unreleased
3	PACK POWDER CONC NAHCO3-720GM Item: 1033039	1 / CA - CASE	17.0000	17.0000	CAD Unreleased
4	ADAPTER IS40F4.1 EA Item: 18 412303	1.00 / EA - EACH	20.0000	20.0000	CAD Unreleased
5	SOLN D.9PCT NACL INJ 500ML Item: 1024750	2 / CA - CASE	32.4000	64.8000	CAD Unreleased
6	ComfortGel SE Stretcher Service Item: 23654	2.00 / EA - EACH	162.5000	325.0000	CAD Unreleased

Tax Total: 1526.04 CAD
Request Total: 13606.84 CAD

6. Select the “Add Line Notes” icon, then select Create.

Comments to Print on Purchase Orders for a comment to the vendor (as with the header comment, this will be the default). Comments must have a title and should be entered in UPPERCASE. Your comments will only apply to this specific item on the requisition.

Your requisition line comment will now look like this

Requisition 522571 Line 6 Comment

<input checked="" type="checkbox"/>	Title	Comment Type	Attachment
<input checked="" type="checkbox"/>	VENDOR INSTRUCTIONS	Print On Purchase Order	

Comment Text

Normal text **B** *I* U HTML

QUOTATION NUMBER EUR000032683

Below you will find a summary of the information that can be entered on the comments

	Print on PO	Print on Delivery Ticket	Display only
Header	Use only for free text services	Use if instructions to Supply Chain staff are the same for all items on the requisition e.g. call Helen upon delivery	Use if comments for your manager apply to all items on the requisition e.g. explanation as to \$ value of requisition
Line	All other print on PO comments should be entered at the line level e.g. quote #s, acceptance of \$0 price	Use if the instructions to Supply Chain staff apply only to one or some of the items on your requisition e.g. for specific product deliver to room 208	Use if the comments for your manager apply to one or some of the items on your requisition e.g. explanation of additional quantities in weekly order

Adding an Attachment

You can now attach a document to your requisition, negating the need to separately email it to the buyer. There is an additional benefit in that your approver will also be able to see the document. Document types can include word docs, PDF, excel files etc. You can attach more than one document. For system performance considerations, attachments should be 10MB or less.

Follow the same methodology that was used to insert a comment on the line. Select the Add Line Notes ICON

Request # 522571 Profile Add to Request + New Request ...

1 - ST. MICHAEL'S HOSPITAL | CENT, Negi, Priyanka

< Add More Items
5 Items within this Request

Refresh Add Header Notes

Line	Item Details	Quantity / UOM	Cost	Total	Status	
2	HOSE HIGH PRESSURE 6FT Item: 1024142	2 / EA - EACH	5827.0000	11654.0000	CAD Unreleased	

Press the create ICON

Comments for Requisition 522571 in Company 1

Create

	Title	Comment Type	Attachment
<input type="checkbox"/>			

Create Comment

Company: ST. MICHAEL'S HOSPITAL (1) Requisition: 522571

Print On Internal Documents Print On Receiving Document Print On Requisition

Print On Purchase Order Print On Pick List Display Only

Print On Purchase Order Trailer Print On Delivery Ticket Invoice Comments

Title * File

Text

Normal text B I U A 66 HTML

Cancel Submit

Select Display only as the comment type

Give your document attachment a descriptive title. For example, if is a quote, title it "Baxter Quote 123". If it is a drawing or plan, title it "ER Location Plan"

Finally attach your file here. The file must be located in your computer somewhere...you cannot copy and paste from an email.

Press the Submit Button

After submitting your attachment it will show in the comments fields for that requisition line item. It will be visible to all who can view the requisition in the system e.g. your approving manager, the buyer.

Requisition 522621 Line 1 Comment

Create

	Title	Comment Type	Attachment
<input type="checkbox"/>	sample document	Display Only	Quotation 123.docx

Your requisition now looks like this

Request # 522571 Profile Add to Request + New Request ...

1 - ST. MICHAEL'S HOSPITAL | CENT, Negi, Priyanka

< Add More Items
5 Items within this Request

Line	Item Details	Quantity / UOM	Cost	Total	Status
2	HOSE HIGH PRESSURE 6FT Item: 1024142	2 / EA - EACH	5827.0000	11654.0000 CAD	Unreleased
3	PACK POWDER CONC NAHCO3-720GM Item: 1033039	1 / CA - CASE	17.0000	17.0000 CAD	Unreleased
4	ADAPTER IS4/DF4 1 EA Item: 18 412303	1.00 / EA - EACH	20.0000	20.0000 CAD	Unreleased
5	SOLN 0.9PCT NACL INJ 500ML Item: 1024750	2 / CA - CASE	32.4000	64.8000 CAD	Unreleased
6	ComfortGel SE Stretcher Service Item: 23654	2.00 / EA - EACH	162.5000	325.0000 CAD	Unreleased

Tax Total 1526.04 CAD
Request Total 13606.84 CAD

Submit

After adding your items, line comments and attachments, you can now release your requisition. Clicking the “Submit” option at the bottom right-side of your RSS screen will submit your requisition for manager (level 1) or director (level 2) approval, depending on your requisition’s total cost. Once the requisition has been released, **NO CHANGES** can be made.

If a change is required, you will need to reach out to your manager/director to un-release the requisition and it will be returned to you in an “unreleased” status. If the requisition was already approved before identifying an error, you will have to reach out to your assigned buyer to make any required changes.

Request # 522571 Profile Add to Request + New Request ...

1 - ST. MICHAEL'S HOSPITAL | CENT, Negi, Priyanka

< Add More Items
5 Items within this Request

Line	Item Details	Quantity / UOM	Cost	Total	Status
2	HOSE HIGH PRESSURE 6FT Item: 1024142	2 / EA - EACH	5827.0000	11654.0000 CAD	Unreleased
3	PACK POWDER CONC NAHCO3-720GM Item: 1033039	1 / CA - CASE	17.0000	17.0000 CAD	Unreleased
4	ADAPTER IS4/DF4 1 EA Item: 18 412303	1.00 / EA - EACH	20.0000	20.0000 CAD	Unreleased
5	SOLN 0.9PCT NACL INJ 500ML Item: 1024750	2 / CA - CASE	32.4000	64.8000 CAD	Unreleased
6	ComfortGel SE Stretcher Service Item: 23654	2.00 / EA - EACH	162.5000	325.0000 CAD	Unreleased

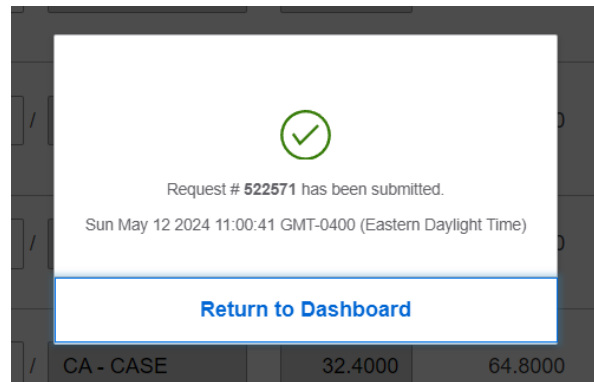
Tax Total 1526.04 CAD
Request Total 13606.84 CAD

Submit

Click on “Submit” when your requisition is ready to be submitted for manager/director approval.

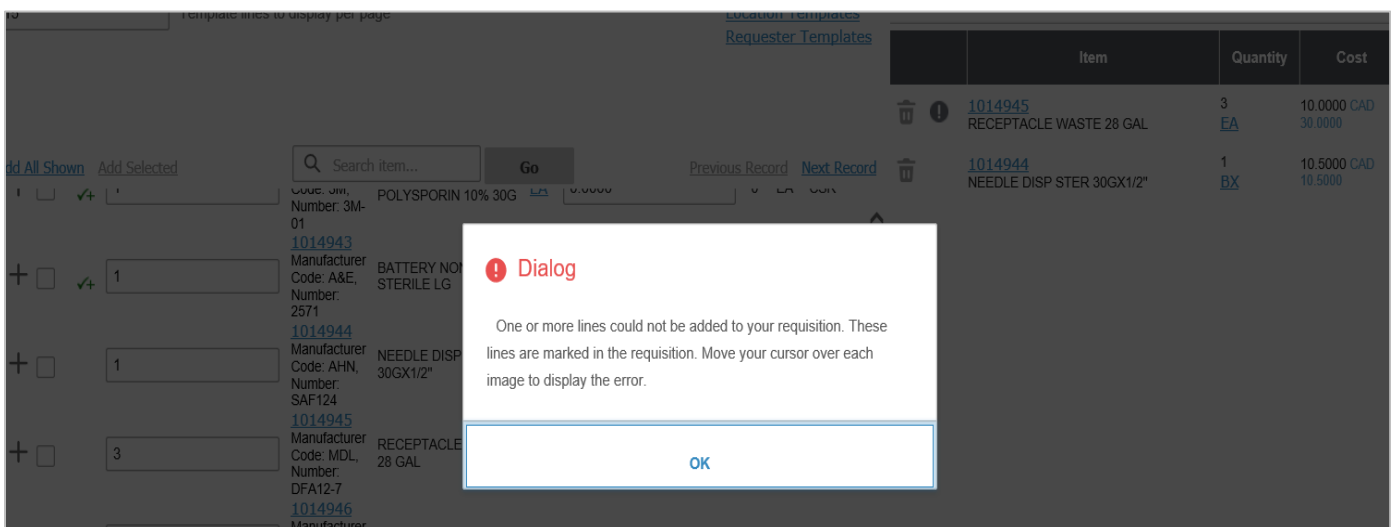
Please note that the notes icon for this item has turned BLUE due to the comments/attachment that was input

Once released, a message will prompt to confirm that your requisition has been successfully submitted for approval. If you do not release your requisition it will stay in your files as unreleased until you release it or delete it.



NOTE – All requisitions must be approved by a manager, authorized as an approver for the ordering AU. Managers can authorize requisitions up to a value of \$50K. Requisitions above this value must also be authorized by the Director responsible for the ordering AU up to a limit of \$250K. Requisitions of a value greater than \$250K can now be submitted using eReq and they will be routed to the according authority as per the signing policy .

If your requisition was unsuccessful in releasing, you will receive the below error message. Should this occur an exclamation mark will appear next to the item with the error. Hover over the mark and a message will pop up explaining the error. Once identified, you can proceed to correct the problem and attempt to release the requisition again.



Create a Freetext Service for your requisition

Let's create a free text item but this time let's add a **service line item**.

Services are defined as maintenance or repairs done by outside parties.

Requisitions for services can be created in RSS eReq. However, **requisitions for service agreements over a specified period of time SHOULD NOT be created in RSS eReq** (see the Special Cases section of the manual for how to requisition service agreements). Please note that **if the total value of your service requisition is >\$25K, the requisition will flow to Sourcing for approval BEFORE** it is routed to your manager for appropriate financial approval.

Requisitions for services/repairs are always completed using freetext (there are no service materials in INFOR).

NOTE - If you have been **provided a quote from the vendor**, please attach it to the requisition using the attachment functionality (see above page 24). This will ensure that it is received by the buyer and it will also be viewable by your approving manager.

Free Text services should be on their own requisition. DO NOT mix free text services with any other items.

First, create a new requisition header per Step 2
When you add lines click on the add a special/Service Item

Request # 522610

1 - ST. MICHAEL'S HOSPITAL | CENT, Negi, Priyanka

Search the Catalog | Add a Special / Service Item

Basic Catalog Search | Switch to Advanced Catalog Search

Q Search the catalog...

Previously Requested Items Shopping List Items Stock Non Stock Special Service

Tax Total 0.00
Request Total 0.00
0 Items within this Request

View Request Details
Submit Request
Delete Request
Notes

The next screen asks you whether you want to create your service item stated in terms of \$ amount or quantity e.g. hrs.' First we will create a requisition to order a service **based on \$ amount**. Select this option

Request # 522610

1 - ST. MICHAEL'S HOSPITAL | CENT, Negi, Priyanka

Search the Catalog | Add a Special / Service Item

Add a Special or Service Item

Add Item Add Amount Service Item Add Quantity Service Item

Add to Request

Now fill in the mandatory/optional fields as shown

Search the Catalog [Add a Special / Service Item](#)

Add a Special or Service Item

Add Item Add Amount Service Item Add Quantity Service Item

Add to Request

Item Description *
Repair a burst pipe

Describe the service that you are engaging

Item *
Repair a burst pipe

Vendor Item
Repair a burst pipe

You MUST enter something in the item field. Vendor Item will self-populate with same

Quantity * UOM * Cost Currency Cost Option
1 EA - EACH 162.50

For an amount service requisition item enter 1 and EA

Requested Delivery Date Deliver To
4/19/2024

Vendor *
2397 - DUPONT PLUMBING & ...

Vendor Purchase From

For Cost enter the expected total \$ value of the service. Quote(s) should be attached as available.

Manufacturer Manufacturer Number

Select your vendor and the appropriate account. You can use the drop down box if you don't know the proper account

Distribution Account

Company Accounting Unit Account
1 - St. Michael's Hospital 713501525 - ENT Clinic - 8C 5440003300 - Plant Maintenanc...

[Show More](#)

Deliver From Company Deliver From Location
1 - ST. MICHAEL'S HOSPITAL SMH - ST. MICHAEL'S HOSPITAL

Tax Code

Taxable

Notes

Normal Text B U S A

Enter notes here...

File Attachment
Browse for file...

1 - ST. MICHAEL'S HOSPITAL | GENT, Negi, Priyanka

< Add More Items

1 Items within this Request

Line	Item Details	Quantity / UOM	Cost	Total	Status
1	HOSE HIGH PRESSURE SET Item: 1024142	1 / EA - EACH	5827.0000	5827.0000 CAD	Unreleased

Tax Total 757.51 CAD
Request Total 6584.51 CAD

Submit

Now lets create a requisition for a free text service, this time using a **Quantity Service**

Again, Free Text services should be on their own requisition. Please do not mix free text services with any other items.

Create and new requisition header per Step 2

When you add lines click on the add a special/Service Item

Request # 522622

1 - ST. MICHAEL'S HOSPITAL | CENT, Negi, Priyanka

Search the Catalog | Add a Special / Service Item

Basic Catalog Search | Switch to Advanced Catalog Search

Search the catalog...

Previously Requested Items Shopping List Items Stock Non Stock Special Service

Tax Total 0.00
Request Total 0.00
0 Items within this Request

View Request Details
Submit Request
Delete Request
Notes

This time select "Add Quantity Service Item"

Request # 522622

1 - ST. MICHAEL'S HOSPITAL | CENT, Negi, Priyanka

Search the Catalog | Add a Special / Service Item

Add a Special or Service Item | Add to Request

Add Item Add Amount Service Item
 Add Quantity Service Item

Tax Total 0.00
Request Total 0.00
0 Items within this Request

Fill in the requisition line details as follows (see next page)

Search the Catalog [Add a Special / Service Item](#)

Add a Special or Service Item

Add Item Add Amount Service Item Add Quantity Service Item **Add to Request**

Item Description * **BAIR HUGGER 775 REPAIR** Describe the service that you are engaging (in this case repair)

Item * **BAIR HUGGER 775 REPAIR** Vendor Item **SERIAL NUMBERS 1234/4567/2542** You MUST enter something in the item field. Vendor Item will self-populate with same. However, in this instance OVERWRITE the Vendor Item Field with the serial numbers of the items being repaired

Quantity * **3** UOM * **EA - EACH** Cost **100** Enter the unit of measure (usually EA for a repair) Enter the quantity of the units being repaired Enter the estimated cost for the repair of EACH unit of measure

Requested Delivery Date: 4/22/2024 Deliver To:

Vendor * **1298 - CARDINAL HEALTH CAN...** Enter the vendor number for the repair

Manufacturer: Manufacturer Number:

Distribution Account

Company: 1 - St. Michael's Hospital Accounting Unit: 713501525 - ENT Clinic - 8C Account: **5710403310 - Equipment Mainte...** Enter the appropriate account to be changed for the repair. Use the drop down if you don't know

[Show More](#)

Deliver From Company: 1 - ST. MICHAEL'S HOSPITAL Deliver From Location: SMH - ST. MICHAEL'S HOSPITAL

Tax Code:

Taxable:

Notes

Normal Text

File Attachment:

Add to Request Press the Add to Request button

← Request # 522622

1 - ST. MICHAEL'S HOSPITAL | CENT, Negi, Priyanka ⓘ

Search the Catalog [Add a Special / Service Item](#)

Add a Special or Service Item

Add Item
 Add Amount Service Item
 Add Quantity Service Item

Item Description *

Item * Vendor Item

Quantity * UOM * Cost Currency Cost Option

Tax Total 0.00
Request Total 300.00 CAD
1 Items within this Request

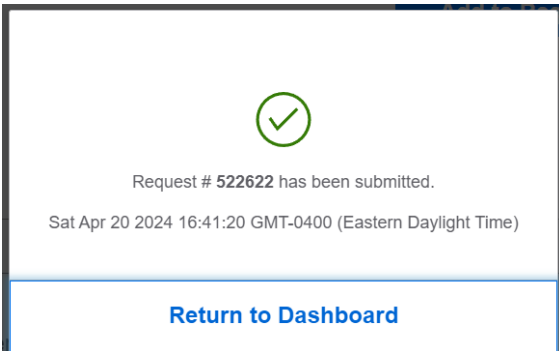
BAIR HUG... 300.0000
BAIR HUGGER 775 REPAIR
Cost: 100.0000

CAD
Quantity: 3.00 EA

View Request Details
Submit Request

The repair order line has now been added to the requisition. You can now add comments and attachments to this requisition line as required (using same view request details described above). **Normally, repairs have been evaluated by a vendor quote. Please remember to attach the quote to the requisition to assist the buyer in placing the PO.**

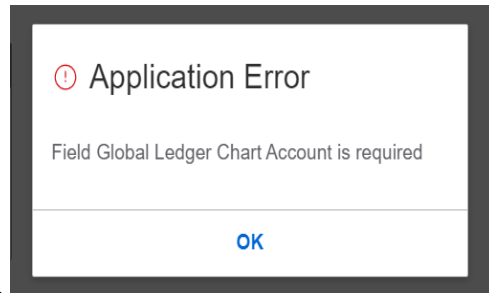
Once you are complete, press the submit request button



For more information on requisitioning a service using eReq, please see the "Special Cases" section on page 29

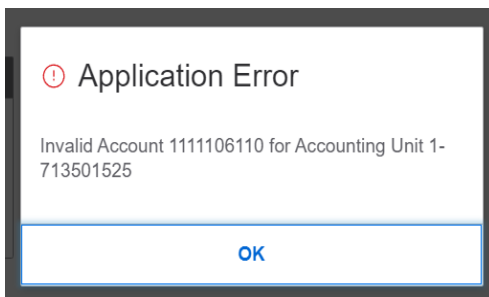
REMINDER – All requisitions must be approved by a manager, authorized as an approver for the ordering AU. Managers can authorize requisitions up to a value of \$50K. Requisitions above this value must also be authorized by the Director responsible for the ordering AU up to a limit of \$250K. Requisitions of a value greater than \$250K can now be submitted using eReq and they will be routed to the according authority as per the signing policy

Most Frequent Reported Errors and what to do



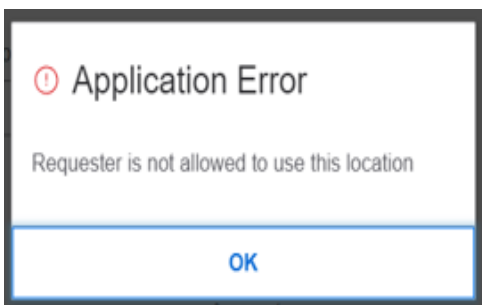
You will get this error whenever you do NOT complete the mandatory fields on a Freetext order e.g. account etc.

Go back and complete all mandatory fields



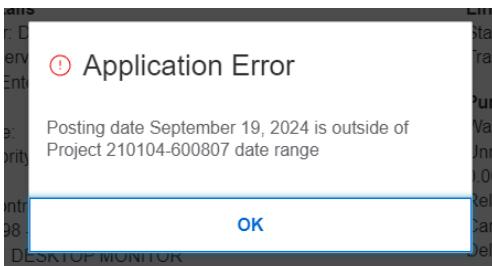
This error is telling you the account you specified is not valid for the AU for which you are ordering

If you feel that the account is valid, this should be reported to your Financial Business Partner for correction



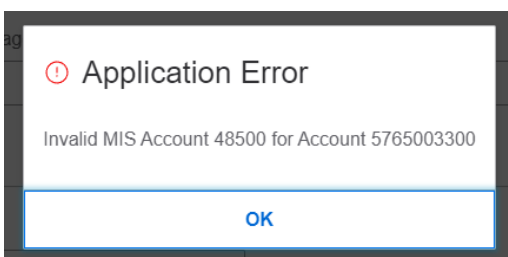
This error indicates that the user is trying to use a requesting location they are not setup for.

If the user is allowed to order for the requesting location's AU, SCM may add the additional requesting location to their requester setup. Talk to your buyer



This error indicates that the user is referencing a project number that is expired

You should speak with your Research Finance Partner to have the project term lengthened

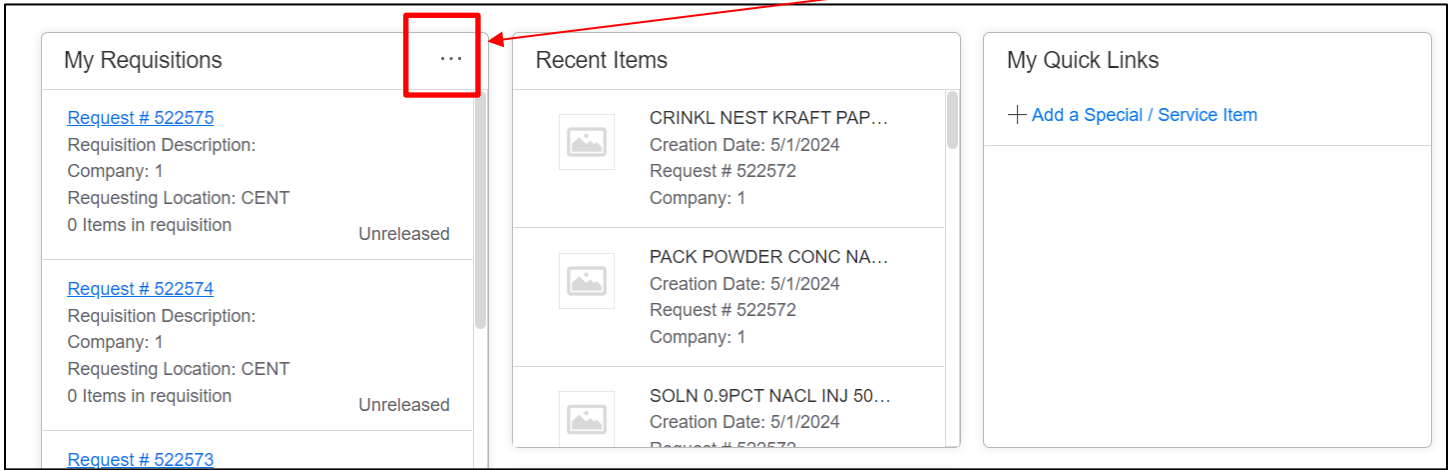


You should only see this error when you try to change the account on a free text requisition line on a saved requisition to

If this error occurs, please contact your buyer to obtain the correct MIS account

STEP 5 - Viewing your requisition's status (in eReq)

On the main screen, press the three dots in the My Requisitions Screen. The View All box will appear



This will show you all of your Requisitions.

The screenshot shows the 'My Requisitions' list with 15 results. The table has the following columns: Company, Request Number, Requesting Location, Requisition Description, Vendor, Vendor Name, Creation Date, Requested Delivery Date, Request Total, and Status. The requisition with Request Number 522588 is highlighted in grey and has a 'Needs Approval' status, which is also highlighted with a red box. A red arrow points to the request number 522588. At the bottom of the table, there are navigation arrows (left, right, and double arrows) which are also highlighted with a red box.

Company	Request Number	Requesting Location	Requisition Description	Vendor	Vendor Name	Creation Date	Requested Delivery Date	Request Total	Status
1	522601	CENT				5/8/2024 2:11:44 PM		0.00	Unreleased
1	522600	CENT				5/8/2024 2:08:09 PM	5/9/2024	0.00	Unreleased
1	522599	CENT				5/8/2024 9:20:26 AM	5/9/2024	1937.98	Unreleased
1	522598	CENT				5/8/2024 9:19:51 AM		0.00	Unreleased
1	522597	14CU				5/8/2024 9:18:16 AM	5/14/2024	0.00	Unreleased
1	522596	14CG				5/8/2024 9:15:53 AM	5/13/2024	0.00	Unreleased
1	522595	15L2				5/8/2024 12:44:31 AM	5/10/2024	0.00	Unreleased
1	522594	14CU				5/8/2024 12:39:53 AM	5/10/2024	0.00	Unreleased
1	522593	14CG	Office supplies			5/8/2024 12:37:59 AM	5/10/2024	0.00	Unreleased
1	522592	CENT				5/7/2024 2:50:09 PM	5/8/2024	13262.02	Unreleased
1	522591	CENT				5/7/2024 10:58:02 AM	5/8/2024	164.80	Needs Approval
1	522590	CENT				5/6/2024 2:08:36 PM	5/7/2024	21479040.00	Unreleased
1	522588	CENT				5/6/2024 10:40:55 AM	5/7/2024	300.00	Needs Approval
1	522587	CENT				5/6/2024 10:40:45 AM	5/7/2024	300.00	Needs Approval
1	522586	CENT				5/6/2024 10:40:30 AM	5/7/2024	300.00	Needs Approval


Click on the requisition for which you want to inquire

This one is pending approval

There may be multiple pages depending on how often you order


Request # 522588

1 - ST. MICHAEL'S HOSPITAL | CENT, Negi, Priyanka



Request # 522588 is Pending Approval.

Request Summary

Line	Item Details	Quantity / UOM	Cost	Total	Status
1	BAIR HUGGER 775 REPAIR Item: BAIR HUGGER	3.00 / EA - EACH	100.0000	300.0000	CAD 

Tax Total: 0.00 CAD
Request Total: 300.00 CAD

If you click on the dots it will tell you where the requisition stands in the approval queue.

Request # 522588

1 - ST. MICHAEL'S HOSPITAL | CENT, Negi, Priyanka

[Back to Request Details](#)


Activity Name	Start	End	Action Taken	Status	Notes	User Name	User ID
UserAction7940	2024-05-06 16:15:58	2024-05-07 16:19:33	TimeOut	Completed		lawson lawson	lawson
UserAction7940	2024-05-07 16:21:38			Started		PurchasingManager SCM	Purchasi

This requisition was moved to approval but timed out and was escalated to the next level

Let look at one that was shows as processed (approved but not yet created as a Purchase Order)

Request # 522554

1 - ST. MICHAEL'S HOSPITAL | CENT, Negi, Priyanka



Request # 522554 is Processed.

Request Summary

Line	Item Details	Quantity / UOM	Cost	Total	Status
1	DRESS PROMOGGRAM MODUL 123CM PROMOGGAN Item: 043985	607 / BX - BOX	411.3900	249713.7300	CAD Processed

Tax Total: 32462.79 CAD
Request Total: 282176.52 CAD

Now let's look at one that is closed (this means closed from a requisitioning point of view, the purchase order has been issued (but the good may or may not have been received).

Request # 522225 is Closed.

Line	Item Details	Quantity / UOM	Cost	Total	Status
1	NEEDLE TARGET TESTINGA, NEEDLE TARGET TESTINGA Item: 1039095	20 / EA - EACH	0.0000	0.0000	CAD Closed
Tax Total					0.00 CAD
Request Total					0.00 CAD

If you click on the line it will give you additional details

Product Details
 Item Number: 1039095
 Item Type: Non stock
 Cost Code: Entered
 Contract:
 Contract Line:
 Contract Priority:
 Tier:
 Preferred Contract:
 Vendor: 158 - BECTON DICKINSON CANADA INC
 Vendor Item: VPN1234

Manufacturer Details
 Name: BECTON DICKINSON CANADA INC.
 Code: BED
 Division:
 Number: 1234
 GTIN:

Line Details
 Status: Closed
 Transaction Type: Issue

Purchase Order Quantities
 Waiting To Create PO: 0.0000
 Unreleased On Purchase Order: 0.0000
 Released On Purchase Order: 20.0000
 Canceled Quantity: 0.0000
 Delivered Quantity: 20.0000

Note that it indicates that the Purchase Order has been created and the good have been delivered

Special Cases

There are 5 special cases in eReq that require additional instructions in order to submit your requisition via RSS eReq, **rush/urgent orders, no charge, minor equipment, vendor determined and after the fact purchase order requisitions**

PROCESS:

IMPORTANT: One requisition can have multiple items from multiple vendors and can also include items being ordered from inventory locations within the hospital. As long as they are being ordered for the same **requesting location**, you can add the order lines that you require under one requisition. The only time you will have to create a separate requisition would be for the following requisition types – **Rush/Urgent Orders, No Charge (see below)**.

Rush/Urgent Orders

Rush/Urgent Orders are defined as required within less than the normal lead time (typically 24-48 hours or less). Requisitions for rush requirements can be created in RSS eReq, but **separately from other requisition lines**. There is nothing in the system that identifies the PO as a rush, **it is only recorded in the comments field of that requisition/requisition line**.

The Requisitioner must contact the buyer via phone, with their manager, to highlight the order as rush. The Requisition approval should be coordinated with the buyer as, while the PO cannot be created until the requisition is approved, **we want to ensure that regularly scheduled PO job does not pick up and send the PO in the normal manner**. Normally, requisitioners have contacted their vendor rep to arrange for quick transport. However, if the “rush” is identified early in the day for end of same day delivery, the buyer can run with the process to contact the vendor and arrange for special shipping.

The buyer finalizes the PO and sends a copy (PDF via email) to the vendor Rep. In some cases, the vendor rep may bring the product in themselves. However, it is essential in these cases that the packing slip gets back to receiving who can ensure that system receipt is completed, allowing the invoice to match and be paid.

No Charge

Requisitions for No Charge requirements can be created in RSS eReq, but **separately from other regular requisition lines**. No charge requisitions can reference both catalogued product and free text products.

For no charge requisitions, the requisitioner needs to advise the buyer at the time of release by email and provide the requisition #.

For a catalogued product, the requisition should be created normally, but the requisitioner should note in the comments to print on purchase order, that the item has been agreed to be supplied at no charge.

For a free text product, the requisition should be created normally, however the requisitioner should put \$.01 EA in the price per unit.

If there is documentation from the vendor agreeing to the no charge PO, it should be provided to the buyer via the attachment function.

The requisition still requires approval by the AU manager, per normal procedure, however the requisition will still show the normal price calculation. The buyer will adjust the purchase order to indicate NO CHARGE before sending it to the vendor.

Minor Equipment

Minor Equipment is defined as equipment with an individual cost of <\$5K. These can be ordered normally through RSS eReq using the Freetext process. Anything over \$5K each must go through the capital process.

NOTE – Requisitions for Telecom and IT Hardware should NOT be submitted through RQC eReq or through the paper/PDF requisition process. Requirements for these types of products should be submitted through the self-serve IT Portal.

<https://uht.service-now.com/ec>

Vendor Determined

Requisitions for Vendor Determined requirements can be created in RSS eReq, but **separately from other regular requisition lines**. Sometimes vendors will not commit to a firm dollar value until after the requisition has been created and submitted.

This requisition can still be created with the following steps:

- Create a Free text requisition, with a cost value of 1 cent
- Change the Cost option field to Vendor Determined

For Vendor Determined requisitions, the requisitioner needs to advise the buyer at the time of release by email and provide the requisition #.

The requisition still requires approval by the AU manager, per normal procedure.

After the Fact Purchase Requisitions

Sometimes, goods and, more particularly, services are arranged by telephone with vendor with the Purchase Order to be created after delivery has occurred. This should **not** be the preferred choice and should be used only in urgent situations e.g. service that needs to be performed ASAP in order for the hospital to fully function with normal operations, last minute or after hour's procedure.

The requisition should be created as a free text for an **Amount Service Item** and the full value of the invoice before taxes should be entered in the unit cost. The vendor name that is on the invoice is vendor you should be using to create this after the fact PO.

Item Description should be: PAY INVOICE - This allows your Buyer to know that the Purchase order does not need to go to the vendor, only to Accounts Payable for the payment to be processed.

Vendor Item should be: INVOICE # 12345 - You would enter the invoice number in this field, which you will find, on the invoice and this will allow Accounts payable to make sure that the correct invoice is being processed on the Purchase order.

Please note you should include a copy of the invoice in the file tab in the comments so the Buyer will be able to send a copy of invoice to Accounts payable for payment.

All other information, should be completed the same as any of free text requisition.

Items that SHOULD NOT be ordered using RSS eReq

Items under the following categories **SHOULD NOT** be requested by end users through RSS eReq: Capital, Furniture, Service Agreements, Standing Orders, Blanket Orders, Loaners, orders for Trust, orders for Consignment.

Capital

Capital Items are defined as products an individual unit cost of greater than \$5K with a lifespan greater than one year. Capital has a very specific process and while, requisitions for capital products are planned to be included in electronic requisition functionality for entry by dedicated specialized users, they should **NOT** be created by the end user using the RSS eReq tool.

For more information on the process to order capital items please go to following URL on the Research Website

https://unitynet.unity.local/wp-content/uploads/2024/04/Research-Capital-Equipment-Request-Form_Feb8_2021-unprotected-GL.pdf

Furniture

Requisitions for furniture should **NOT** be created by the end user using the RSS eReq tool.

The Planning and Redevelopment team leads the planning of our present and future facilities. Directed by the corporate strategic plan, they coordinate all capital renovations of clinical and administrative areas, manage the development of new facilities and coordinate the allocation of physical space across the campus. Requests to alter a space (e.g. furniture, moving offices, replacing floor, electrical outlets, security control devices or equipment's infrastructure impacts) require a Space Modification Request Form (SMRF). You can initiate a SMRF through the following link

Requests for furniture can be submitted using the online [TMS SMRF Web Request Form](#).

Service Agreements

Service Agreements are purchase commitments for services over a period of time. They can be for a fixed number of service or preventative maintenance calls or similar to an extended warranty with unlimited service over a defined period of time.

Requisitions for service agreements **should not be submitted via RSS eReq** and **MUST** be submitted using the paper PDF requisition form and the requestor should discuss their needs with their buyer prior to completing and submitting the requisition.

Setting up service agreements/Purchase Orders in INFOR requires special processing by the sourcing team. If the total \$ value of the service agreement is greater than \$25K and the services are not already covered in a service contract, the requisition will be forwarded to Sourcing to go through a sourcing process.

Standing Orders and Blanket Orders

Requisitions for standing or blanket orders **SHOULD NOT** be submitted via RSS eReq and **MUST** be submitted using the paper PDF requisition form. The requestor should discuss their needs with their buyer prior to completing and submitting the requisition. Items to be included on a standing or blanket PO, **MUST** be in the catalogue.

Ideally, the term of the standing or blanket order should be a fiscal year (April to March), but it is not mandatory. If the total \$ value of the standing or blanket order is greater than \$25K, and the items are **NOT** covered by a supply contract, the requisition will be forwarded to Sourcing to go through a sourcing process.

Loaners

Loaners are equipment provided free of charge from a supplier for a specific need or purpose. Loaners are utilized by a few departments e.g. the OR or Clinical Engineering. Personnel requesting loaner equipment should specify quantities, estimated time of use and return, and restocking requirements.

Loaners have a very specific process and requisitions for loaners **SHOULD NOT** be submitted by end users using RSS Requisition

For more information on the process to order loaned equipment please contact your buyer

Trust

Goods and Services to be charged to Trust **SHOULD NOT** be ordered through RSS eReq and **MUST** be ordered using the paper PDF requisition form. These requisitions required specific and additional authorizations before they can be converted into Purchase Orders. If you have a requirement to order goods/services charged to TRUST, please discuss the requirements with your buyer.

Consignment

Consigned products **SHOULD NOT** be ordered by end users through RSS eReq.

If your unit is considering use of consignment products, please discuss with your buyer as there is a defined process to identify and contract for these products as well as a different ordering process that is outside RSS eReq.

- **Requesting Location:** Is the code for where your products are to be delivered as well as being directly linked to your Accounting Unit. If you do not know your requesting location, please reach out to your buyer.
- **Name of Vendor:** The name of the vendor that you require your items from. E.g. Cardinal Health.
- **Contact Name:** If you require the PO to be sent to a specific vendor contact, then you will need to provide this person's name. E.g. Sales Rep name.
- **Phone Number:** The vendor contact's phone number or the customer service phone number.
- **Email Address:** The vendor contact's email address or the customer service email.
- **Co:** Enter in your Site's company number. E.g. SJHC = 31, SMH= 1 & PHC= 21.
- **Accounting Unit:** Enter in your UHT Accounting Unit (AU)
- **Account:** The 10 digit account to charge the item. E.g. Med Surg = 5460603100 (accounts listing on UnityNET).
- **Vendor Catalogue No.:** The vendor's item/catalogue number that is used to place the order.
- **Item #:** The Infor item number (if available).
- **Item/Service Description:** The description of the item or service to be ordered.
- **Quantity:** The amount you wish to order (stated in the unit of purchase stated below).
- **Unit of Measure:** The packaging quantity of how the item will be sold and billed to us from the vendor.
- **Unit price:** The price of the item stated in the unit of purchase stated above.
- **Extended price:** The total price of the quantity you are ordering (Quantity x Unit Price).
- **Comments/Special Instructions:** Any comments you would like added to the PO or delivery instructions can be entered here (Contract ID, Standing /Blanket orders urgency of order, etc.).
- **Authorized Names:** The printed name of the signing authority (ies), based on total dollar value that will be approving the order.
- **Authorized Signature:** The signature of the signing authority (ies)

Blanket & Standing orders: When filling out this PDF requisition to setup blanket and standing orders. The end user must also provide the following information:

- The duration/frequency of the order e.g. start date: Jan 1 – Dec 31, 2024, every first Monday of the month.
- The items you wish to order and the total quantity **for the duration of the standing/blanket**
- Whether this is an extension to previous standing/blanket or net new order.
- The requisition should be signed for total value of the duration of the standing/blanket.

Should you require more than nine items on your order, please use a second PDF requisition form and list the other items you require on it. Please add a comment in the Comments field indicating that this is page 1 of 2 and page 2 of 2 etc.

Once this form is completed with approvals, please email to your Buyer. If you have any questions regarding this form, please reach out to your buyer and they can assist you further.