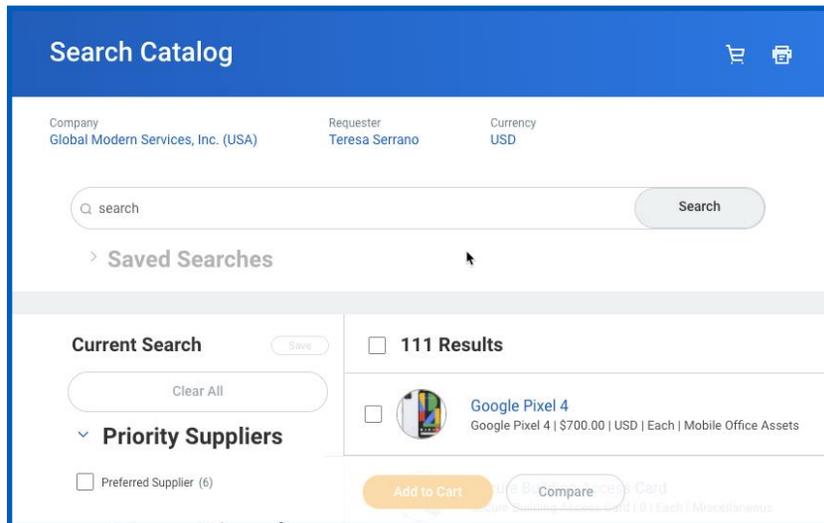


ORDER ITEM FROM THE STORES CATALOG

1. Navigate to the **Search Catalog** task in the **Purchases** application.
2. Confirm your Company, Requester, Currency, Ship-To address, and optionally, Requisition Type, Deliver-To, Cost Center, Location, Region, and Additional Worktags (many of these will auto-populate).
3. Click **Search**.
4. Search for items to order by either:
 - a. Scrolling through the list of available items.
 - b. Filtering items by Priority Suppliers, Category Hierarchy, Category, Supplier, Catalog, Item Tags, or Manufacturer (if your company has catalogs loaded).
 - c. In the search field, enter your criteria.



5. Next to the items you want to order, select the **checkbox**, and then click **Add to Cart**.
6. In the upper right, click the **Cart**  icon to review your cart, then click **Checkout** to proceed.



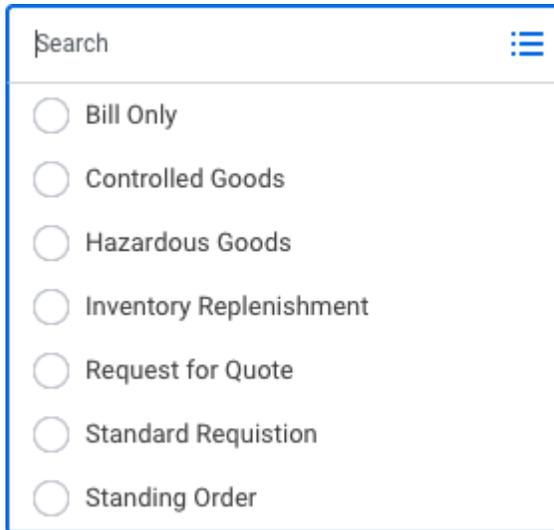
Note: Click Continue Shopping to select additional items from the Catalog. You can also Request Non-Catalog Items, Connect to Supplier website, Add from Templates and Requisitions, Select from My Procurement Favorites, or Request Project-Based Services.

7. Review the procurement request before submitting it. In your cart you can change the quantity ordered. You can also upload an attachment to provide more information for the approver.
8. Click **Submit**.

View the submitted purchase request and any approvals needed by your organization by clicking View Details and expanding the Details and Process section. Click Done to complete your requisition.

CREATE A PROCUREMENT REQUEST

1. From the Purchases application select "Request Non-Catalog Item" or search for the "Create Requisition" Task
2. Select Requisition Type



A search dropdown menu with a search bar at the top containing the text "Search" and a hamburger menu icon. Below the search bar, there are seven radio button options: "Bill Only", "Controlled Goods", "Hazardous Goods", "Inventory Replenishment", "Request for Quote", "Standard Requisition", and "Standing Order".

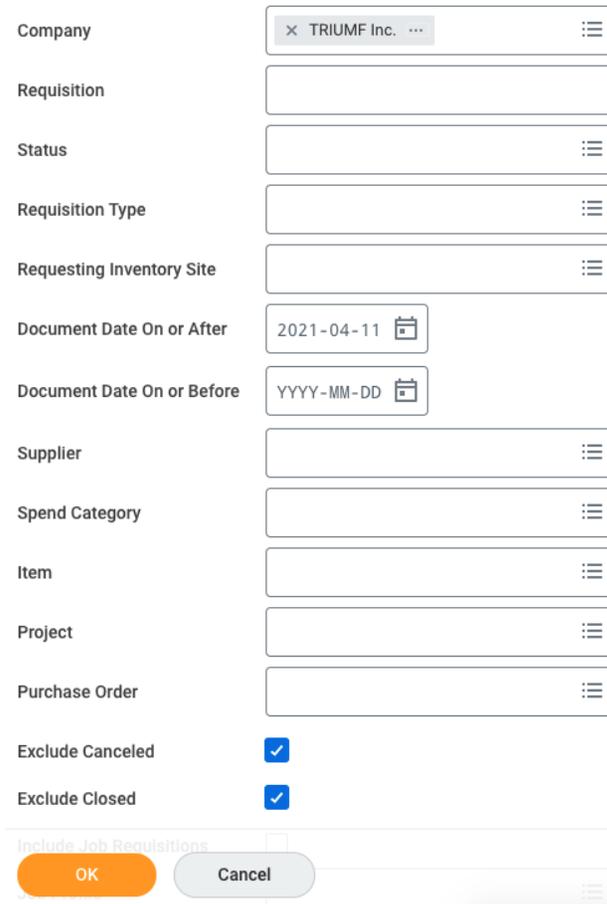
3. Select a Program, Fund or Grant
4. Click **OK**
5. Enter the Goods or Services requested
6. Click **Add to Cart**
7. Add more items if required
8. Click on **Cart**  to Checkout
9. Review and **Submit**

VIEW AND EDIT REQUISITIONS

VIEW AN EXISTING REQUISITION

1. From the Purchases application click **Requisitions**

My Requisitions



A form titled "My Requisitions" with the following fields and controls:

- Company: Dropdown menu showing "x TRIUMF Inc. ..."
- Requisition: Text input field
- Status: Dropdown menu
- Requisition Type: Dropdown menu
- Requesting Inventory Site: Dropdown menu
- Document Date On or After: Date picker showing "2021-04-11"
- Document Date On or Before: Date picker showing "YYYY-MM-DD"
- Supplier: Dropdown menu
- Spend Category: Dropdown menu
- Item: Dropdown menu
- Project: Dropdown menu
- Purchase Order: Dropdown menu
- Exclude Canceled: Checked checkbox
- Exclude Closed: Checked checkbox
- Include Job Requisitions: Unchecked checkbox
- Buttons: "OK" (orange) and "Cancel" (grey)

2. Complete fields or leave blank as desired
3. Click **OK**

My Requisitions

Create Requisition

Selection Criteria

Company TRIUMF Inc.

Document Date On or After 2021-04-11

Exclude Canceled Yes

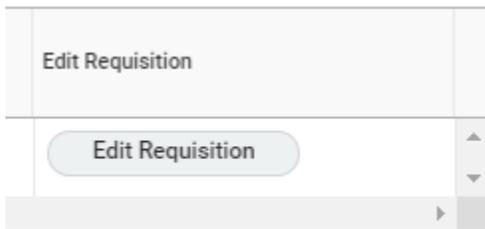
Exclude Closed Yes

Procurement Requisitions

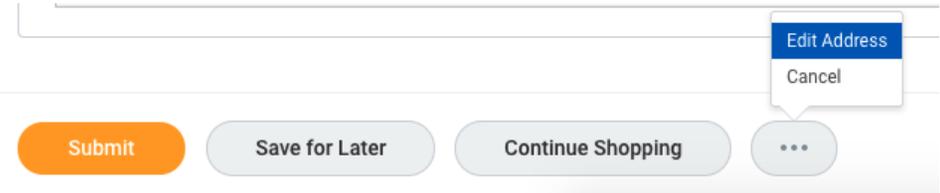
1 item

Requisition	Requisition Type	Requesting Inventory Site	Document Date	Total Amount	Currency	Supplier
10000001			2021-05-11	22.40	CAD	

4. Requisitions that are still in process can be edited. To edit a requisition, scroll to the right and click **Edit Requisition**.



5. Make your changes in the appropriate text fields. To change the shipping address, click **...** at the bottom of the page and then **Edit Address**.



6. After making your changes, click **Submit**.