

Mustang Market

Requisitioner User Guide

Financial Services



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Overview

Introduction

Mustang Market is Western's e-Procurement tool and is designed to provide you with the tools to easily access preferred vendor pricing, shop for items and request payments for goods and services incurred in the course of business at Western.

This guide provides the information and action steps that you will need to perform in Mustang Market with the role of Requisitioner.

Objectives of this guide

The objectives of this guide are to provide:

- An overview of the shopping process
 - From item selection to vendor fulfillment
 - The steps to select and submit items
 - Including items not found in the vendor catalogues
 - Details about the approval process for requisitions to be submitted
 - How to view
 - Actions available to the Requisitioner
-

How to use this guide

Refer to the table of contents to find the topic area you want details about, within each topic section you will find explanations, as well as step by step instructions that walk you through the task.

Where to go for additional support

For additional support please go to the Financial Services training website:
https://www.uwo.ca/finance/training_reference/index.html#procuranchor1

You can also send an email to: procurement@uwo.ca for questions / comments that are not addressed through other options.

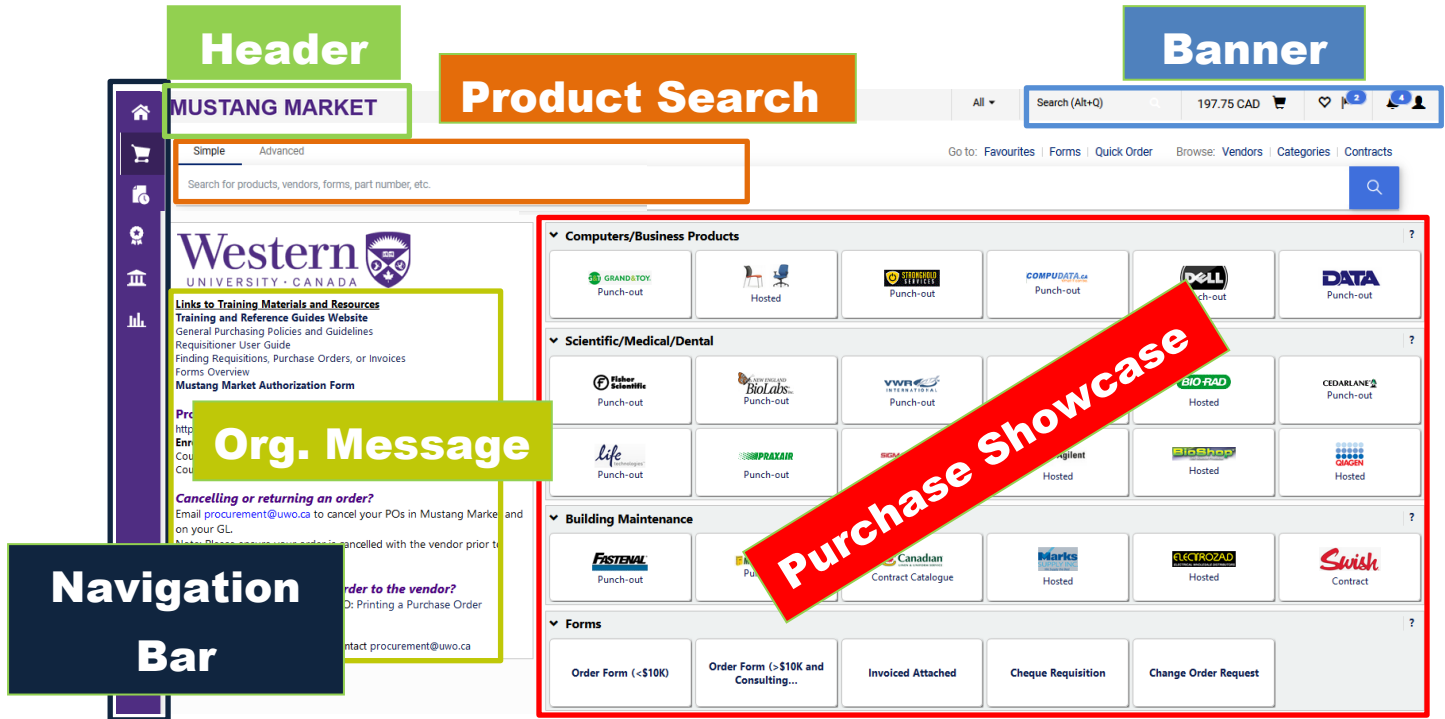
Mustang Market Basics

Introduction

Mustang Market is Western's web-based eProcurement solution for sourcing and purchasing goods and services.

Mustang Market interface




When you log in to Mustang Market you are taken to the Home page. The image below provides an overview of the homepage and points out key areas to help you navigate it.



The table below explains each of the main elements of the Mustang Market homepage.

| Element | Description |
|-------------------|---|
| Header | This is the title bar for Mustang Market, clicking on the header will return you to the homepage. |
| Banner | This area provides access to actions you need to take, messages, your active shopping cart, and key admin tasks such as profile setup. |
| Product Search | This area is also called 'shop at the top' and is one method for locating products in Mustang Market. |
| Navigation Bar | This is the main menu for accessing functions in Mustang Market, such as viewing documents or recent shopping carts. |
| Org. Message | This is the area where Western posts important messages for Mustang Market users. It also provides links to training materials. |
| Purchase Showcase | This is where preferred vendors are displayed. You can click on a vendor to search their catalogue (hosted) or access their site (punch-out). |

The table below contains a description for each main menu items found on the Navigation Bar. Menu items displayed depend on your role and/or your specific permissions.

| Menu Option | Description |
|---|---|
|  Home | Clicking on the Home icon will return the user to the site page that is configured as the homepage. The default is shopping home. |
|  Shop Menu | The Shop menu contains the menu options related to shopping tasks including product quick search, access to the shopping page, forms and favourites. It is also where you can access carts and orders you have created, or have been shared / assigned to you. |
|  Orders Menu | The Orders menu contains menu options related to searching for any type of document found in Mustang Market (Purchase Orders, Requisitions, Invoices, etc.) and also where you go to view your own orders, and if applicable, requisitions sent to you for approval. |

Definitions

The table below provides a list of terms that are used in Mustang Market.

| Term | Definition |
|----------------------------|---|
| Approver | A person with budgetary authority who 'approves' a requisition. |
| Assign | A term used to indicate that a draft cart has been sent to a Requisitioner to view and submit for approval, or an Approver has put a requisition into their folder to action. |
| Cheque Requisition | A cheque requisition is a request to have payment made for non-procurement related activities. For example: conference payments where Pcards are not accepted. |
| Hosted Catalogue | A vendor, whose catalogue of items with special pricing negotiated for Western, is viewable on Mustang Market. |
| Non-Catalogue Item | Items being purchased that cannot be found on Mustang Market or punch-out sites. |
| Purchase Order | A purchase order is created once a requisition is approved. This is the formal order document sent to the vendor. |
| Punch-out Catalogue | A website that Mustang Market directs the user to, where items with Western pricing are displayed and available to select for purchase. |
| Requisitioner | A person who can shop AND submit a requisition for approval. |
| Requisition | Purchase requisition (PR) is the document created once the Requisitioner submits a 'shopping cart' for approval. |
| Shopper | A person who can 'put items' in a cart but cannot submit their own requisition. |
| Voucher/Invoice | A payment document tied to the purchase order. |
| Workflow | A term used to describe the steps a document goes through from start to finish, including approvals. |

Supported browsers

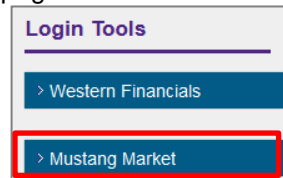
Mustang Market needs to use **mixed content** and **cookies** in order to provide the full functionality of the system. The following browsers are compatible with Mustang Market; however you may need to configure your browser to enable mixed content (explained below the list).

- Internet Explorer v11 and higher
- Firefox v23 and higher
- Chrome v21 and higher

How to log in to Mustang Market

To log in to Mustang Market, go to the Western Financial Services webpage:

- <http://www.uwo.ca/finance/>
 - Click on the Mustang Market button, found under 'Login Tools' on the right side of the page.



- Log in using your: Western ID and Password
 - If you do not know this information, contact Western Technology Services.

NOTE: If you know your username and password, but cannot login, it may mean that you do not have access to Mustang Market. Please email procurement@uwo.ca for assistance in obtaining and submitting the required access form.

Do not bookmark the login page; there is a hidden re-direct that will prevent a bookmark from working. However, you can book mark the finance webpage and then use the Mustang Market login button.

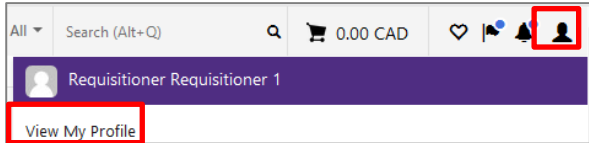
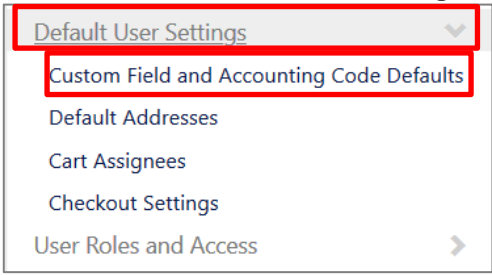
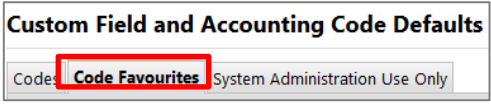
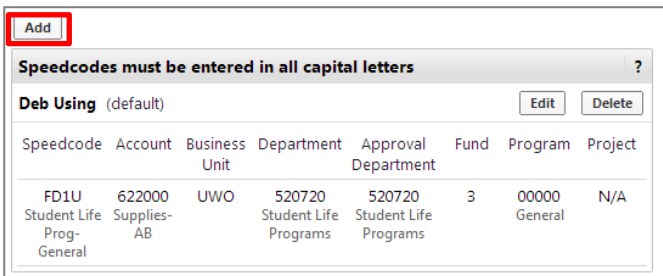
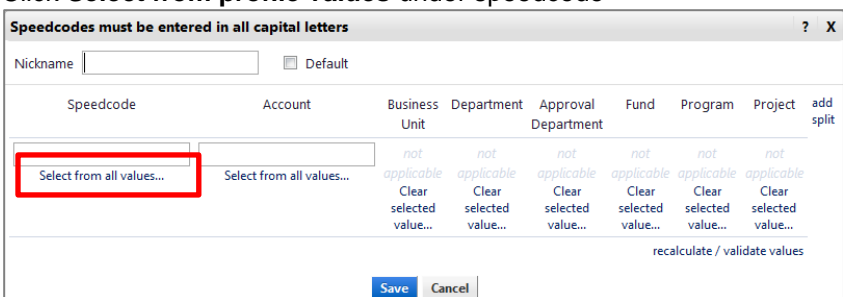
A - Setting up your Mustang Market Profile

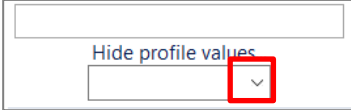

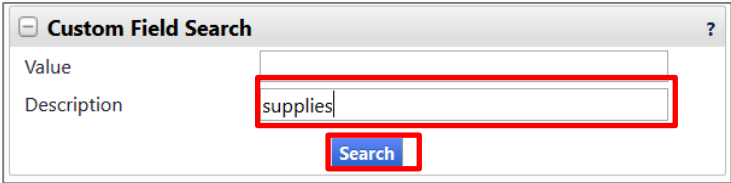
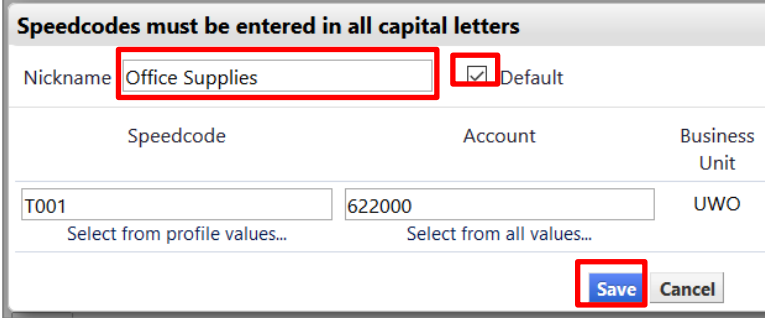
Introduction

Before you begin shopping you need to set up your profile by adding default speedcodes, shipping addresses, etc. This will simplify the shopping process.

Setting up your accounting information (default speedcode)

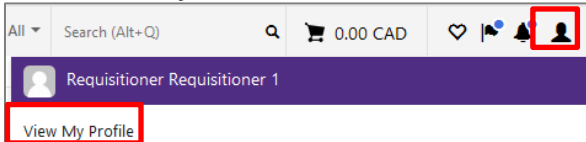
To set a default speedcode, follow the steps in the table below.

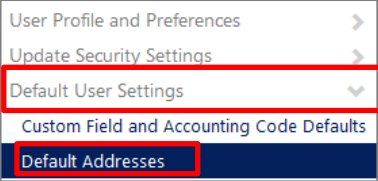
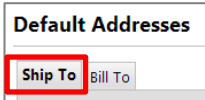
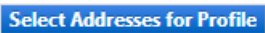
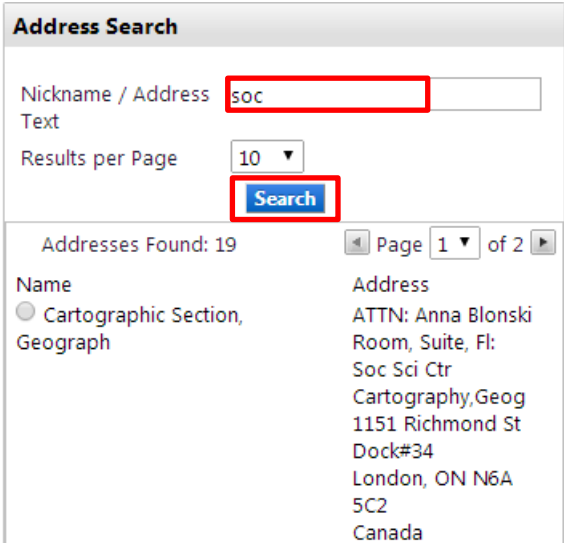
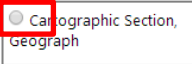
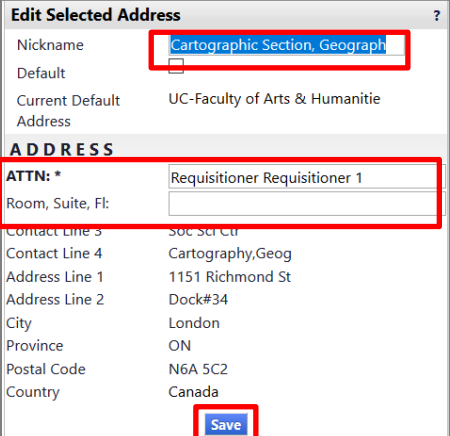
| Step | Action |
|------|--|
| 1. | <p>Click the Person icon from the banner</p> <ul style="list-style-type: none"> Select View My Profile from the menu  |
| 2. | <p>Click Default User Settings from the menu on the left</p> <ul style="list-style-type: none"> Click Custom Field and Accounting Code Defaults  |
| 3. | <p>Click the Code Favourites tab</p>  |
| 4. | <p>Click Add above the Speedcode box</p>  |
| 5. | <p>Click Select from profile values under speedcode</p>  |

| | |
|----|--|
| | <ul style="list-style-type: none"> • Click the drop down arrow • Select the value you want to make your favourite  <p>OR</p> <p>Type in your speedcode and account code manually:</p>  |
| 6. | <p>Click Select from profile values under Account</p> <ul style="list-style-type: none"> • Enter a Description in the pop-up dialogue box • Click Search • Scroll and click select next to the account you want to add  |
| 7. | <p>Type in a Nickname for the default speedcode</p> <ul style="list-style-type: none"> • Check the Default checkbox to set this as the default code • Click Save  |

Setting up a shipping address

To set a default shipping address, follow the steps in the table below.

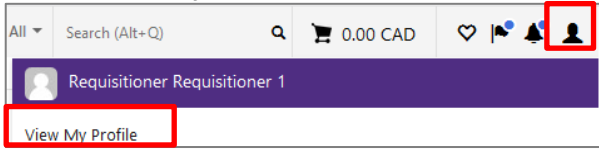
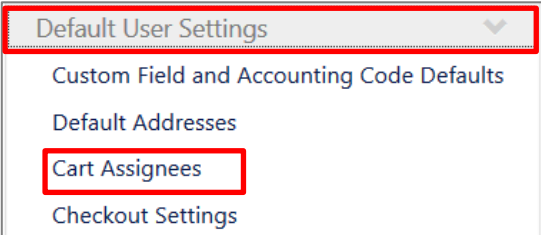
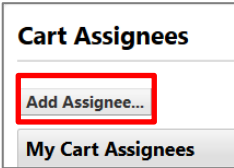
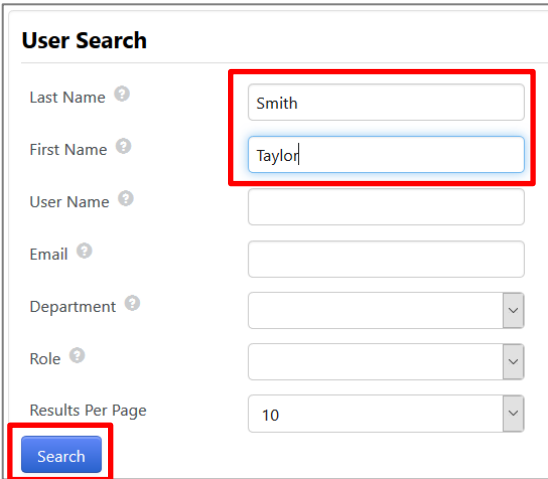
| Step | Action |
|------|---|
| 1. | <p>Click on the Person icon from the banner</p> <ul style="list-style-type: none"> • Select View My Profile from the menu  |
| 2. | Click Default User Settings from the menu on the left |

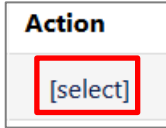
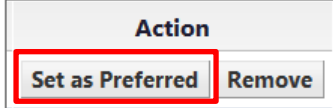
| | |
|----|---|
| | <ul style="list-style-type: none"> Click Default Addresses  |
| 3. | Click Ship To tab  |
| 4. | Click Select Addresses for Profile  |
| 5. | Enter the first few letters of the location you want to find, for example: for addresses in Social Sciences Centre, type 'soc' <ul style="list-style-type: none"> Click Search  |
| 6. | Click Radio button next to the appropriate address  |
| 7. | Click Default to set the selected address as your default <ul style="list-style-type: none"> Enter a room number (optional). Click Save  |

Adding a cart assignee

There may be times when you want to assign your cart to another Requisitioner to review and submit on your behalf. You can search for and assign a Requisitioner when you are done shopping, or you can set up a default Requisitioner that is displayed for you to select.

To set up a default assignee, follow the steps in the table below.

| Step | Action |
|------|---|
| 1. | <p>Click on the Person icon in the Banner area</p> <ul style="list-style-type: none"> Select View My Profile  |
| 2. | <p>Click Default User Settings from the menu on the left</p> <ul style="list-style-type: none"> Click Cart Assignees  |
| 3. | <p>Click Add Assignee from the 'Cart Assignees' area in the centre of the page</p>  <ul style="list-style-type: none"> Type in the name of the person you want to setup as an assignee in the 'Last Name' & 'First Name' fields Click Search  |

| | |
|----|--|
| 4. | <p>Click Select next to the name of the person you want to assign</p>  <p>The screenshot shows a grey rectangular box with the word "Action" in bold black text at the top. Below it, there is a button with the text "[select]" in a light blue font, which is highlighted with a red rectangular border.</p> |
| 5. | <p>Click Set as Preferred, if you want that person to be your default assignee</p>  <p>The screenshot shows a grey rectangular box with the word "Action" in bold black text at the top. Below it, there are two buttons: "Set as Preferred" and "Remove". The "Set as Preferred" button is highlighted with a red rectangular border.</p> <ul style="list-style-type: none">• You can add multiple assignees, who will be available from a drop down menu when you are finished shopping and click 'Assign' cart. |

B - Placing an Order



Introduction

There are many ways to shop in Mustang Market. You can go to specific vendor catalogues (hosted or punch-out), search across multiple catalogues, and use a form to purchase items that are: not found in the vendor catalogues, from vendors who are not setup in Mustang Market, or for services. The following pages provide information and the steps for these types of shopping. Read the intro above the steps for each to be sure that you are following the correct method for your purchase type.

Conducting a simple product search


The simple Product Search is used to search multiple vendor catalogues and is available from the Shopping Homepage of Mustang Market. The table below provides the steps to conduct a Simple Search.

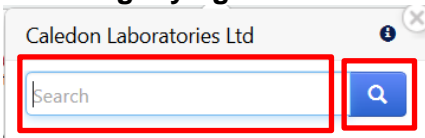

Note: The search results will not include all punch-out vendor items as some punch-out catalogues are not loaded directly into Mustang Market.

| Step | Action |
|------|--|
| 1. | <p>Click in the Product Search field</p> <ul style="list-style-type: none"> Type in a product type <ul style="list-style-type: none"> Be as specific as possible to improve search results <p>For example: red pen is better than 'pen'</p>  <p>The screenshot shows a search interface with two tabs: 'Simple' (selected) and 'Advanced'. Below the tabs is a search input field containing the text 'beaker'. To the right of the input field is a blue search button with a magnifying glass icon. A red box highlights the input field.</p> |
| 2. | <p>Click the magnifying glass</p> <ul style="list-style-type: none"> Search results will display on a new page |
| 3. | <p>Beside the item you wish to purchase: Update the number of items, if needed</p> <ul style="list-style-type: none"> Click Add to Cart  <p>The screenshot shows a quantity input field with the number '1' and an 'Add to Cart' button with a dropdown arrow. A red box highlights both the quantity field and the button.</p> <p>OR</p> <ul style="list-style-type: none"> Click the item name to see additional details about the item. |

Placing an order from a hosted or contract catalogue

When you click on a *Hosted* or *Contract* Catalogue vendor from the Purchase Showcase you are able to browse for products specific to that vendor within Mustang Market. To shop using a catalogue, follow the steps in the table below.


| Step | Action |
|------|---|
| 1. | <p>Click on the vendor sticker from the Purchase Showcase</p>  <p>The screenshot shows a vendor sticker with the text 'MICALEDON' in blue and 'Hosted' in red below it. A red box highlights the 'Hosted' text.</p> |
| 2. | <p>Enter a product or key word in the Search field to look for a specific product type, or</p> <ul style="list-style-type: none"> Leave the Search field empty, to see all available products |

| | |
|----|--|
| | <ul style="list-style-type: none"> ○ Click Magnifying Glass  |
| 3. | <p>Beside the item you wish to purchase:</p> <ul style="list-style-type: none"> • Update the number of items, if needed • Click Add to Cart  <p>OR</p> <ul style="list-style-type: none"> • Click the item name to see additional details about the item. |
| 4. | Follow the steps in the section ' Submitting your shopping cart ' to complete the purchase, once you have selected all the items you need to purchase. |

Placing an order from a punch-out catalogue

When accessing a punch-out catalogue, you are automatically taken to the vendor's ordering website. The website will show the appropriate products and pricing based on the contract with Western.

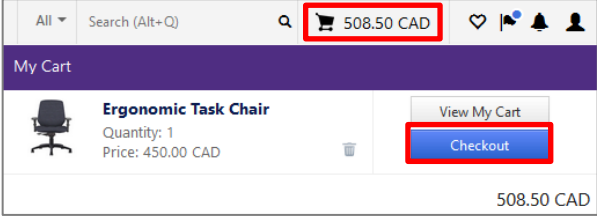
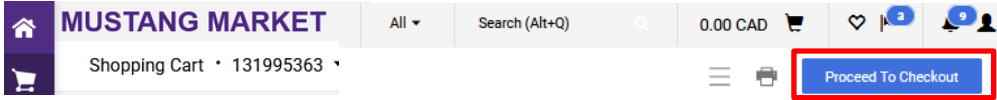





To shop from a punch-out site, follow the steps in the table below:



| Step | Action |
|------|---|
| 1. | <p>Click on the vendor sticker from the Purchase Showcase</p> <ul style="list-style-type: none"> • You are redirected to the vendor's webpage and recognized as being from Western  |
| 2. | Search for your product(s) |
| 3. | Add the item(s) to your shopping cart |
| 4. | <p>Checkout from the vendor site once you have all the items you want</p> <ul style="list-style-type: none"> • Some sites may have a 'transfer' button in addition to check-out, follow the instructions to finalize the sale on the site <ul style="list-style-type: none"> ○ This returns you to the Mustang Market with the items you selected from the punch-out site |
| 5. | Follow the steps in the section ' Submitting your shopping cart ' to complete the purchase, once you have selected all the items you need to purchase. |

Submitting your shopping cart

When you have added all of the items you want to your shopping cart in Mustang Market, you will need to submit it. This step will send it to an Approver to approve, if applicable, and will create the requisition number.

To submit a cart, follow the steps in the table below.

| Step | Action |
|------|--|
| 1. | <p>There are 2 ways to submit your cart, you can either:</p> <ul style="list-style-type: none"> Click on the Shopping Cart icon from the banner at the top <ul style="list-style-type: none"> Click on Checkout from the drop down menu  <p>OR</p> <ul style="list-style-type: none"> Click Proceed to Checkout, if you are already in the Shopping Cart view  |
| 2. | <p>If you do not have default accounting codes setup, then: On the 'Requisition', Accounting Codes section:</p> <ol style="list-style-type: none"> Click the edit icon  Enter the codes directly into the fields or use the magnifying glass to search for a code <div data-bbox="599 1058 1013 1171"> <p>Speedcode * Account *</p> <p>Search Search</p> <p><small>Required Required</small></p> </div> Click the recalculate / validate values checkmark  Click Save  |
| 3. | <p>If you do not have a default shipping address setup, then: On the 'Requisition', Shipping/Billing section:</p> <ol style="list-style-type: none"> Click the edit icon  Scroll down, below your saved addresses, to the Shipping address code field Enter the 'name' of the department or building <ol style="list-style-type: none"> Note: these will likely be shorted. For example, to search for Chemistry, try searching "chem"). <div data-bbox="716 1717 1089 1797"> <p>chem </p> <p>Shipping address code</p> </div> Select the most relevant address. Edit the ATTN and Room fields if applicable. You can also save the address for future use by clicking Add to my addresses |

| | |
|----|---|
| | Click Save  |
| 4. | Click Submit Requisition from the top right of the screen  |

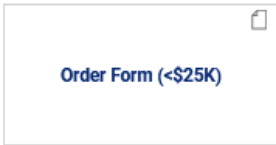
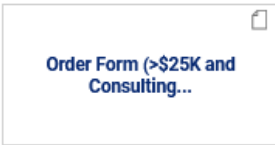
Placing an order for non-catalogue items or consulting services

The non-catalogue order forms should be used when you cannot find the item needed from the catalogues (hosted, contract, or punch-out). You can also use the non-catalogue forms when you are purchasing from a new vendor (one who is not yet on Mustang Market), or to create a purchase order for services.

There are two non-catalogue forms; they are based on the total amount of the purchase and / or type of purchase. The forms are identical with one exception: the over \$25K / Consulting form has one extra section that needs to be completed: the Competitive Bid Requirements section.

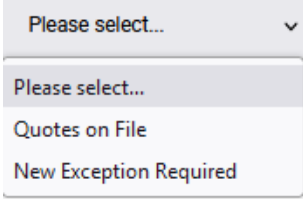
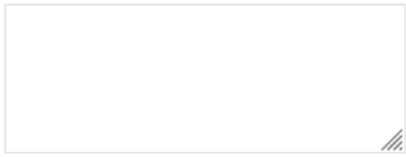
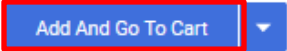
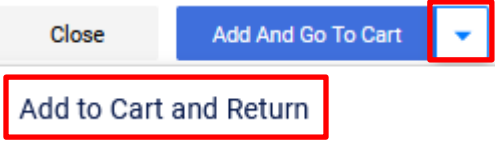
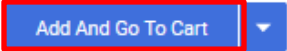
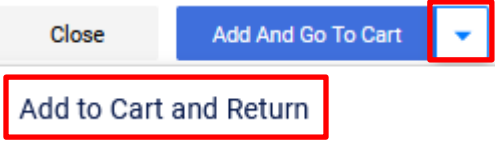
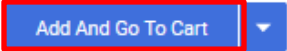
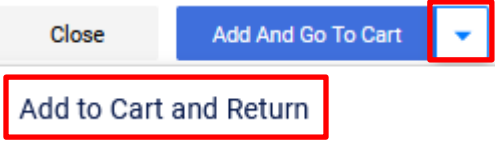
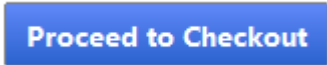
**Do not use either form to submit an invoice for payment. Email the invoice to apinvoice@uwo.ca with the PO number on it. If a PO doesn't exist, submit the invoice on an Invoice Attached Form, refer to the '[Invoice Attached – submitting an invoice for payment without a PO](#)' section for details.

To complete the Under \$25K and Over \$25K/Consulting forms follow the steps in the table below.


| Step | Action | | | | |
|-----------------------------|--|---------------------|----------|-----------------------------|--|
| 1. | <p>Click the appropriate form, located near the bottom of the Purchase Showcase, select the:</p> <ul style="list-style-type: none"> • <\$25K Order Form for items totaling less than \$25K (before tax) • >\$25K / Consulting Order Form for items totaling \$25K or more (before tax), or Consulting <ul style="list-style-type: none"> ○ When you are acquiring consulting services, you must use the >\$25K / Consulting form regardless of the amount of the engagement. All consulting services require competitive bidding prior to the purchase. <div style="display: flex; justify-content: space-around; margin-top: 10px;"> <div style="border: 1px solid #ccc; padding: 5px; text-align: center; width: 150px;">  </div> <div style="border: 1px solid #ccc; padding: 5px; text-align: center; width: 150px;">  </div> </div> | | | | |
| 2. | <p>Type the first few letters of vendor name in the Vendor Search Field</p> <table border="1" style="margin-top: 10px; width: 100%;"> <thead> <tr> <th>If the vendor is...</th> <th>Then....</th> </tr> </thead> <tbody> <tr> <td>Available in Mustang Market</td> <td> <p>Select the vendor from the list that appears and continue to step #3.</p> <div style="border: 1px solid #ccc; padding: 5px;"> <p>Enter Vendor <input style="width: 150px;" type="text" value="acm"/></p> <ul style="list-style-type: none"> <li style="background-color: #e0e0e0; padding: 2px;">ACM-ICPC, ECNA RPC - USD <li style="padding: 2px;">Acme Analytical Laboratories </div> </td> </tr> </tbody> </table> | If the vendor is... | Then.... | Available in Mustang Market | <p>Select the vendor from the list that appears and continue to step #3.</p> <div style="border: 1px solid #ccc; padding: 5px;"> <p>Enter Vendor <input style="width: 150px;" type="text" value="acm"/></p> <ul style="list-style-type: none"> <li style="background-color: #e0e0e0; padding: 2px;">ACM-ICPC, ECNA RPC - USD <li style="padding: 2px;">Acme Analytical Laboratories </div> |
| If the vendor is... | Then.... | | | | |
| Available in Mustang Market | <p>Select the vendor from the list that appears and continue to step #3.</p> <div style="border: 1px solid #ccc; padding: 5px;"> <p>Enter Vendor <input style="width: 150px;" type="text" value="acm"/></p> <ul style="list-style-type: none"> <li style="background-color: #e0e0e0; padding: 2px;">ACM-ICPC, ECNA RPC - USD <li style="padding: 2px;">Acme Analytical Laboratories </div> | | | | |

| | | |
|----|--|---|
| | <p>Not found / new in Mustang Market</p> | <p>If the vendor is not found, type new vendor in the field and select New Vendor from the list.</p> <div data-bbox="748 191 1219 279" style="border: 1px solid black; padding: 5px;"> <p>Enter Vendor <input type="text" value="new v"/> <input type="button" value="New Vendor"/></p> </div> <p>Complete as much of the New Vendor portion (right side of the form) as possible, refer to the section How to enter a new vendor for details.</p> <p>New Vendor Details</p> <p><i>Select New Vendor in the Enter Vendor field under the Non-Catalogue Item Details section, if</i></p> <p>Vendor's Legal Name <input type="text"/></p> <p>Doing Business As' Name <input type="text"/></p> <p>GST/HST Reg # <input type="text"/></p> <p>Conflict of Interest Is there an actual or perceived conflict of interest vendor? <input type="button" value="v"/></p> <p>Vendor Payment Method <input type="radio"/> EFT or Wire <input type="radio"/> Cheque</p> <p>Vendor will be contacted directly to arrange EFT or Wire payments.</p> |
| 3. | <p>For new vendors: select the Currency, from drop down (existing vendors will have this pre-filled)</p> | |
| 4. | <p>Enter a Product Description to indicate what item you are purchasing Note: you can only enter ONE item per order form.</p> | |
| 5. | <p>Enter the Catalogue number, if known</p> <p>Catalogue No. <input type="text"/></p> | |
| 6. | <p>Enter the number of the items you are purchasing in the Quantity field</p> <p>Quantity * <input type="text"/></p> | |
| 7. | <p>Enter the total price in the Estimated Price field, this is the amount before tax</p> <p>Estimated Price (pre-tax) * <input type="text"/></p> | |
| 8. | <p>Select the Packaging option from the drop down menu</p> <ul style="list-style-type: none"> o This is the unit of measurement (i.e. each, box.) <p>Packaging * <input type="button" value="EA - Each"/> <input type="button" value="v"/></p> | |
| 9. | <p>Select a Commodity Code from the drop down menu</p> <ul style="list-style-type: none"> • This is a code that represents a category for the item you are purchasing. For example: office supplies, computer equipment, science equipment. <p>Commodity Code * <input type="button" value="v"/></p> | |

| | |
|-----|---|
| 10. | <p>Select applicable Health & Safety information related to the item.</p> <p>Health and Safety</p> <ul style="list-style-type: none"> <input type="checkbox"/> Controlled substance <input type="checkbox"/> Recycled <input type="checkbox"/> Hazardous/Bio-Hazardous material <input type="checkbox"/> Radioactive <input type="checkbox"/> Rad Minor <input type="checkbox"/> Select Agent <input type="checkbox"/> Toxin <input type="checkbox"/> Energy Star <input type="checkbox"/> Green <ul style="list-style-type: none"> • Radioactive, hazardous, and controlled substances must be indicated on the form by selecting the appropriate Health and Safety checkbox. • Radioactive orders require a Permit Number to be entered on the Requisition Summary screen and a Chemistry ship-to address must be selected during the checkout process. <ul style="list-style-type: none"> ○ For details about adding a shipping address, refer to ‘Submitting your shopping cart’ |
| 11. | <p>Select a response to the accessibility consideration question.</p> <ul style="list-style-type: none"> • Provide an explanation for your selection in the comments field below the selection. <p>Have you considered accessibility criteria and features in this purchase? *</p> <p>Yes <input type="radio"/></p> <p>No <input type="radio"/></p> <p>Explain</p> <div style="border: 1px solid #ccc; height: 40px; width: 100%;"></div> <p>254 characters remaining</p> |
| 12. | <p>Click Add Attachment under External Attachments to attach any forms you need to send to the vendor (such as quotes or contracts)</p> <p>External attachments are for any documents to be sent to the vendor.</p> <p>Do not use this form to submit an invoice.</p> <p>External Attachments Add</p> <p>Note: Internal comments can be added on the Requisition's Summary screen during the check-out process.</p> |
| 13. | <p>Complete the Competitive Bid Requirement section for all consulting (regardless of dollar value) or total purchase over \$25K. For details about this requirement refer to: https://www.uwo.ca/finance/procurement/preparing_buy/competitive_bid_process.html#</p> <p>To complete the competitive bid section on the form: Select either:</p> <ul style="list-style-type: none"> • Quotes on File if you obtained the minimum number required by the purchase amount. • Exception if you have a valid reason for not requiring multiple quotes. |

| | <p>For further details about either requirement, go to: https://www.uwo.ca/finance/procurement/preparing_buy/competitive_bid_process.html</p>  <p>Add Comments related to the quote or exception in the box below, for example for:</p> <ul style="list-style-type: none"> • Quotes on file: indicate the number of quotes obtained • Exception: enter the exception reason. <p>For Quotes on File -> Enter number of quotes obtained or RFX number For New Exception Required -> Enter exception report reason</p>  <p>2000 characters remaining expand clear</p> <p>**Ensure you attach the successful quote to the form to send it to the vendor along with the PO document, see step #12 above.</p> | | | | | | |
|--|---|----------------|---------|--|--|--|--|
| 14. | <p>To add the form to your shopping cart:</p> <table border="1" data-bbox="532 1024 1448 1577"> <thead> <tr> <th data-bbox="532 1024 808 1056">If you are....</th> <th data-bbox="808 1024 1448 1056">Then...</th> </tr> </thead> <tbody> <tr> <td data-bbox="532 1056 808 1157">Not purchasing another item from that vendor</td> <td data-bbox="808 1056 1448 1157"> Click Add And Go To Cart at the top, right of the form  </td> </tr> <tr> <td data-bbox="532 1157 808 1577">Purchasing another item from the same vendor</td> <td data-bbox="808 1157 1448 1577"> Select Add to Cart and Return at the top right of the form, <ul style="list-style-type: none"> • This adds the form to your cart and open up another form with the same vendor already selected. • Click on the down arrow and select "Add to Cart and Return"  <ul style="list-style-type: none"> • Return to step #4 and complete the form </td> </tr> </tbody> </table> | If you are.... | Then... | Not purchasing another item from that vendor | Click Add And Go To Cart at the top, right of the form  | Purchasing another item from the same vendor | Select Add to Cart and Return at the top right of the form, <ul style="list-style-type: none"> • This adds the form to your cart and open up another form with the same vendor already selected. • Click on the down arrow and select "Add to Cart and Return"  <ul style="list-style-type: none"> • Return to step #4 and complete the form |
| If you are.... | Then... | | | | | | |
| Not purchasing another item from that vendor | Click Add And Go To Cart at the top, right of the form  | | | | | | |
| Purchasing another item from the same vendor | Select Add to Cart and Return at the top right of the form, <ul style="list-style-type: none"> • This adds the form to your cart and open up another form with the same vendor already selected. • Click on the down arrow and select "Add to Cart and Return"  <ul style="list-style-type: none"> • Return to step #4 and complete the form | | | | | | |
| 15. | <p>Click Proceed to Checkout</p>  | | | | | | |
| 16. | <p>From the Requisition tab, enter the Accounting Codes and Shipping Address if you do not have defaults set up.</p> <ul style="list-style-type: none"> • Refer to ‘Submitting your shopping cart’ in this guide, for details on how to do both steps. | | | | | | |

| | |
|-----|---|
| 17. | Click Submit Requisition from the top right of the screen to send your requisition for approval. |
|-----|---|






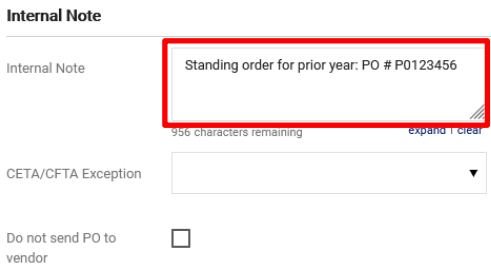




Creating a standing order

Standing Orders may be issued to repeatedly purchase a product or service from the same vendor over the course of a fiscal year, if the quantity and/or cost is unknown. The standing order PO is set up with the vendor who will submit invoices against the PO.

- Note: To make a change to a standing order, use the Change Order Request form.

To create a standing order, follow the steps in the table below.

| Step | Action |
|------|---|
| 1. | Complete either the Under \$25K or Over \$25K/Consulting Order Form to initiate a standing order. <ul style="list-style-type: none"> In the Product Description field, enter “SO” before the description of the product or service Select from <u>only one vendor</u> for standing orders |
| 2. | Click Proceed to Checkout from the top of the screen  |
| 3. | Click the Edit icon in the General section of the Summary tab <ul style="list-style-type: none"> Scroll down to Standing Order  |
| 4. | Click the arrow to edit <ul style="list-style-type: none"> Select Yes from the drop down menu  |
| 5. | Click Save  <ul style="list-style-type: none"> Enter details outlining the frequency of the standing order in the <i>External Notes</i> section of the header, if applicable <p>Note: Refer to the section 'Adding external notes and attachments (Vendors)' for details about using this field.</p> |
| 6. | IF there was a prior years's PO number then: <ul style="list-style-type: none"> Under Internal Notes, select edit  <ul style="list-style-type: none"> Enter the prior year's PO number, if applicable, and any other notes Click Save  |

| | |
|----|--|
| | |
| 7. | <p>To set up a standing order for the next fiscal budget year, change the Accounting Date field (General section) to May 1st of that year:</p>  <p>The screenshot shows a purple header bar labeled 'Edit General'. Below it, the 'Accounting Date' field is visible, containing the date '01/05/2021' and a calendar icon. The date field is highlighted with a red rectangular box. Below the date, the format 'dd/mm/yyyy' is indicated.</p> |
| 8. | <p>Enter the Accounting Codes and Shipping Address if you do not have defaults setup.</p> <p>Refer to 'Submitting your shopping cart' in this guide, for details on how to do both steps.</p> |
| 9. | <p>Click Submit Requisition</p>  <p>A blue button with the text 'Submit Requisition' is shown.</p> |

C - Ways to Request Payment or Change an Order

Introduction

In the Forms section of the Purchase Showcase, there are forms that you use when you need to: request payment for goods / services already received without a purchase order, when you want to request payment for a non-procurement related activity, or need to change an order that has already completed workflow. These forms are:

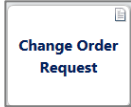
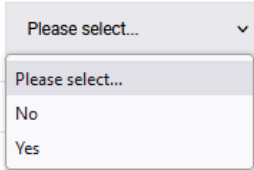
- Change Order
- Invoice Attached
- Cheque Requisition

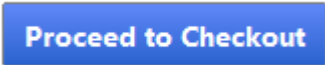

Change Order – requesting a change to your purchase order

Use the Change Order Request form to make a change to an existing purchase order or standing order, **do not use this form to cancel an order**.

To cancel an order, first cancel with the vendor and then email procurement@uwo.ca with the PO number and reason for cancellation.

To submit a change order, follow the instructions in the table below.

| Step | Action |
|------|---|
| 1. | Click Change Order Request , found under 'Forms' on the Purchase Showcase  |
| 2. | Enter the original Purchase Order Number Purchase Order Number * <input type="text"/> |
| 3. | Enter the Vendor Name Vendor Name * <input type="text"/> |
| 4. | Enter the New PO Total <ul style="list-style-type: none"> • This is the current PO total plus any requested increases or decreases (the final pre-tax PO amount). New PO Total * <input type="text"/> |
| 5. | Select a response to Send Revised PO to Vendor , using the drop down menu to indicate whether or not to send the revised PO to the vendor Send Revised PO to Vendor *  |
| 3. | Select the applicable check box(es) in the Change Order Request Details section, on the right of the form, to indicate the changes that need to be made to the original order. <ul style="list-style-type: none"> • Enter a description in the field below the check boxes to provide additional details about the order |

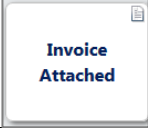
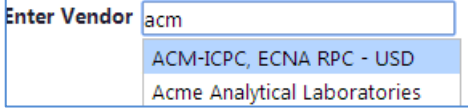
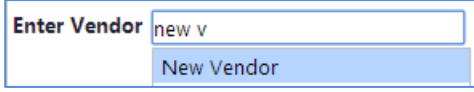
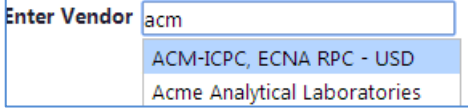
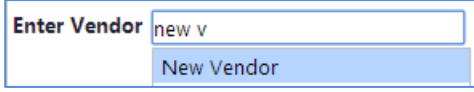
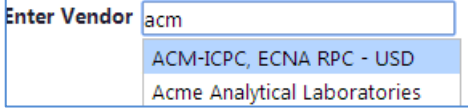
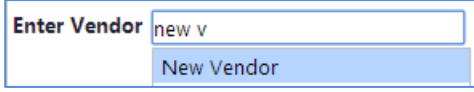
| | |
|----|--|
| | <input type="checkbox"/> Change Account: New Account should be entered on requisition. <input type="checkbox"/> Change Speedcode(s): New Speedcode(s) should be entered on requisition. <input type="checkbox"/> Increase Amount: <input type="checkbox"/> Decrease Amount: <input type="checkbox"/> Change Quantity: <input type="checkbox"/> Add a New Line: Enter description, quantity, unit price, UOM, account, speedcode in change descript. <input type="checkbox"/> Cancel line: Enter line number below. |
| 4. | Click Add and go to Cart from the top right of the form, once it is complete. <ul style="list-style-type: none"> Click Go |
| 5. | Click Proceed to Checkout  |
| 6. | Enter the Accounting Codes and Shipping Address if you do not have defaults set up. Refer to ' Submitting your shopping cart ' in this guide, for details on how to do both steps. |
| 7. | Click Submit Requisition from the top right of the screen  |

Invoice Attached – submitting an invoice for payment without a PO

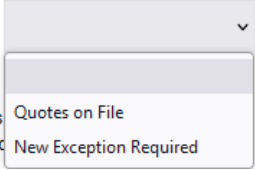
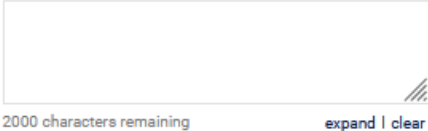



There are times when you have to obtain service prior to generating a requisition and purchase order in Mustang Market; for example an emergency repair. In these cases, use an **Invoice Attached** form to submit an invoice for payment.

Note: If a Purchase Order was created ahead of time and you still received the invoice from the vendor, email the invoice to apinvoice@uwo.ca and indicate the PO number associated with it. Do not use the Invoice Attached form to submit it.

To submit an Invoice Attached form, follow the steps in the table on the next page.

| Step | Action | | | | | | |
|--------------------------------|--|---------------------|----------|-----------------------------|---|--------------------------------|---|
| 1. | Click Invoice Attached , found under 'Forms' on the Purchase Showcase  | | | | | | |
| 2. | Enter the first few letters of the vendor name in the Enter Vendor field and: <table border="1" data-bbox="496 380 1435 1486"> <thead> <tr> <th data-bbox="496 380 680 478">If the vendor is...</th> <th data-bbox="680 380 1435 478">Then....</th> </tr> </thead> <tbody> <tr> <td data-bbox="496 478 680 657">Available in Mustang Market</td> <td data-bbox="680 478 1435 657"> Select the vendor from the list that appears and continue to step #3.  </td> </tr> <tr> <td data-bbox="496 657 680 1486">Not found / new Mustang Market</td> <td data-bbox="680 657 1435 1486"> If the vendor is not found, type new vendor in the field and select New Vendor from the list.  Complete as much of the New Vendor portion (right side of the form) as possible, refer to the section How to enter a new vendor for details. New Vendor Details <i>Select New Vendor in the Enter Vendor field under the Non-Catalogue Item Details section, if</i> Vendor's Legal Name <input type="text"/> Doing Business As' Name <input type="text"/> GST/HST Reg # <input type="text"/> Conflict of Interest Is there an actual or perceived conflict of interest? <input type="text"/> <input type="button" value="v"/> Vendor Payment Method <input type="radio"/> EFT or Wire <input type="radio"/> Cheque Vendor will be contacted directly to arrange EFT or Wire payments. </td> </tr> </tbody> </table> | If the vendor is... | Then.... | Available in Mustang Market | Select the vendor from the list that appears and continue to step #3.  | Not found / new Mustang Market | If the vendor is not found, type new vendor in the field and select New Vendor from the list.  Complete as much of the New Vendor portion (right side of the form) as possible, refer to the section How to enter a new vendor for details. New Vendor Details <i>Select New Vendor in the Enter Vendor field under the Non-Catalogue Item Details section, if</i> Vendor's Legal Name <input type="text"/> Doing Business As' Name <input type="text"/> GST/HST Reg # <input type="text"/> Conflict of Interest Is there an actual or perceived conflict of interest? <input type="text"/> <input type="button" value="v"/> Vendor Payment Method <input type="radio"/> EFT or Wire <input type="radio"/> Cheque Vendor will be contacted directly to arrange EFT or Wire payments. |
| If the vendor is... | Then.... | | | | | | |
| Available in Mustang Market | Select the vendor from the list that appears and continue to step #3.  | | | | | | |
| Not found / new Mustang Market | If the vendor is not found, type new vendor in the field and select New Vendor from the list.  Complete as much of the New Vendor portion (right side of the form) as possible, refer to the section How to enter a new vendor for details. New Vendor Details <i>Select New Vendor in the Enter Vendor field under the Non-Catalogue Item Details section, if</i> Vendor's Legal Name <input type="text"/> Doing Business As' Name <input type="text"/> GST/HST Reg # <input type="text"/> Conflict of Interest Is there an actual or perceived conflict of interest? <input type="text"/> <input type="button" value="v"/> Vendor Payment Method <input type="radio"/> EFT or Wire <input type="radio"/> Cheque Vendor will be contacted directly to arrange EFT or Wire payments. | | | | | | |
| 3. | Enter the Invoice Amount , this is the amount before taxes Invoice Amount (excluding taxes) * <input type="text"/> | | | | | | |
| 4. | Enter the Supplier Invoice No. Supplier Invoice No. * <input type="text"/> | | | | | | |
| 5. | Enter the Product Description <ul style="list-style-type: none"> This is where you indicate what you purchased | | | | | | |


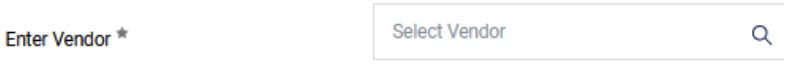
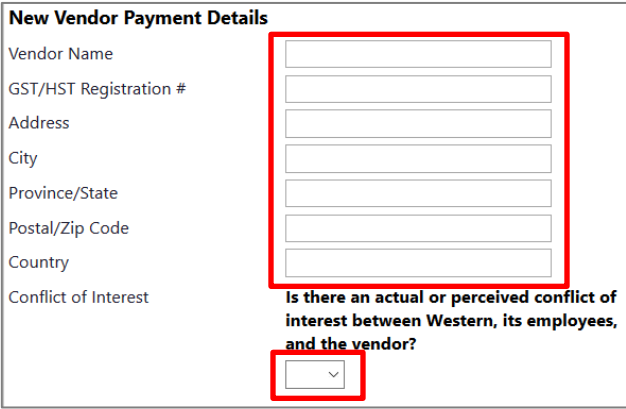



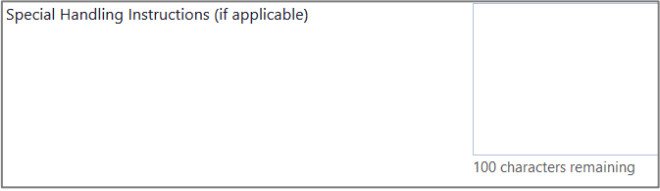
| | |
|-----|--|
| | <p>Product Description *</p> <div style="border: 1px solid #ccc; padding: 5px; min-height: 40px;"> 254 characters remaining expand clear </div> |
| 6. | <p>Enter the number of items you have purchased in the Quantity field</p> <p>Quantity *</p> <input style="width: 80px; height: 25px;" type="text"/> |
| 7. | <p>Select the Commodity Code from the drop down menu</p> <ul style="list-style-type: none"> This is the category of the item purchased, i.e. office supplies, computing equipment <p>Catalogue No.</p> <p>Quantity *</p> <p>Commodity Code *</p> <div style="border: 1px solid #ccc; padding: 5px; margin-top: 10px;"> <p>M307 - Supplies-Heat/Refrg</p> <p>M308 - Supplies-Plumbing</p> <p>M309 - Supplies-Cleaning</p> <p>M409 - Supplies-Office Products</p> <div style="border: 2px solid red; padding: 2px; text-align: right;"> v </div> </div> |
| 8. | <p>Select a response to the accessibility consideration</p> <ul style="list-style-type: none"> Explain your selection in the comments box below <p>Have you considered accessibility criteria and features in this purchase? *</p> <p><input type="radio"/> Yes</p> <p><input type="radio"/> No</p> <p>Explain</p> <div style="border: 1px solid #ccc; padding: 5px; min-height: 40px;"> 254 characters remaining </div> |
| 9. | <p>Click Add beside Internal Attachments</p> <ul style="list-style-type: none"> Attach the invoice from the vendor <p>Internal Attachments Add</p> |
| 10. | <p>Select a Reason Code to indicate why a payment is being made without a Purchase Order</p> <ul style="list-style-type: none"> Add an explanation in the Explanation field to provide details to support your Reason Code <p>Reason Code *</p> <p>Explanation *</p> <div style="border: 1px solid #ccc; padding: 5px; margin-top: 10px;"> <p>Please select... v</p> <p>Please select...</p> <p>Reimbursement to Company or Affiliates (i.e. salaries, travel, lab fees)</p> <p>Urgent Request to Vendor</p> <p>Deposit or Advance Payment Required</p> <p>Registration or Membership Fee</p> </div> |
| 11. | <p>Complete the Competitive Bid Requirement section for <u>all consulting or items over \$25K</u>:</p> |

| | |
|-----|--|
| | <ul style="list-style-type: none"> • Select either: <ul style="list-style-type: none"> ○ Quotes on File if you obtained the minimum number required by the purchase amount. ○ Exception if you have been granted an exception by Procurement and do not require quotes. <ul style="list-style-type: none"> ▪ For further details about either requirement, go to: https://www.uwo.ca/finance/procurement/preparing_buy/competitive_bid_process.html <div style="text-align: center;"> <p>Quotes or Exception</p>  <p>For Quotes on File -> Enter number of quotes For New Exception Required -> Enter exception report reason</p> </div> <ul style="list-style-type: none"> • Input Comments related to the quote or exception in the box below <ul style="list-style-type: none"> ○ Quotes on file: indicate the number of quotes obtained ○ Exception: enter a valid reason for not requiring multiple quotes <p>For Quotes on File -> Enter number of quotes obtained or RFX number For New Exception Required -> Enter exception report reason</p> <div style="text-align: center;">  <p>2000 characters remaining expand clear</p> </div> <ul style="list-style-type: none"> • You should attach the successful quote to the form to send it to the vendor along with the PO document, refer to step #9 for details. |
| 12 | Click Add And Go To Cart from the top of the form, once the form is complete <div style="text-align: center;">  </div> |
| 13. | Click Proceed to Checkout <div style="text-align: center;">  </div> |
| 14. | Enter the Accounting Codes and Shipping Address if you do not have defaults setup. Refer to ' Submitting your shopping cart ' in this guide, for details on how to do both steps. |
| 15. | Click Submit Requisition from the top right of the screen <div style="text-align: center;">  </div> |

Cheque Requisition—requesting payment for a non-procurement activity

A Cheque Requisition can be used to request payment for a non-procurement related activity or service. Refer to the list of permissible uses on the form.

To complete this form, follow the steps in the table below.

| Step | Action |
|------|---|
| 1. | Click the Cheque Requisition form, found under 'Forms' on the Purchase Showcase  |
| 2. | Type the first few letters of the vendor name in the Vendor field <ul style="list-style-type: none"> Type New Vendor if the vendor is <u>not</u> already in Mustang Market  |
| 3. | For new vendors, enter the Vendor Details  <ul style="list-style-type: none"> Respond to the conflict of interest question using the drop down arrow, for details refer to the COI information found at: https://www.uwo.ca/finance/procurement/ethical_procurement_practices.html |
| 4. | Enter the Payment Total , after taxes  |
| 5. | Select the applicable Tax Included option  |
| 6. | Select the Mail Cheque option that is applicable  |
| 7. | Enter the Special Handling Instructions , if applicable  |
| 8. | Enter the Product Description to indicate what good/service was purchased |

| | |
|-----|--|
| | <p>Product Description</p> <div style="border: 1px solid black; height: 40px; width: 100%;"></div> <p style="text-align: right; font-size: small;">254 characters remaining</p> |
| 9. | <p>Click Add Attachments:</p> <ul style="list-style-type: none"> Under Internal to send relevant documents to Accounts Payable <div style="border: 1px solid black; padding: 5px;"> <p>Please attach any relevant back-up documentation for Accounts Payable:</p> <p>Internal Attachments</p> <div style="border: 1px solid gray; display: inline-block; padding: 2px 5px; margin-top: 5px;">Add Attachments</div> </div> |
| 10. | <p>Click Add and go to Cart from the top right of the form</p> <ul style="list-style-type: none"> This takes you back to the shopping cart view <div style="display: flex; justify-content: space-around; margin-top: 10px;"> <div style="border: 1px solid gray; padding: 2px 10px; background-color: #f0f0f0;">Close</div> <div style="border: 1px solid gray; padding: 2px 10px; background-color: #0056b3; color: white;">Add And Go To Cart</div> <div style="font-size: 1.2em;">▼</div> </div> |
| 11. | <p>Click Proceed to Checkout</p> <div style="border: 1px solid gray; padding: 2px 10px; background-color: #0056b3; color: white; margin-top: 10px; display: inline-block;">Proceed to Checkout</div> |
| 12. | <p>Enter the Accounting Codes and Shipping Address if you do not have defaults setup.</p> <p>Refer to 'Submitting your shopping cart' in this guide, for details on how to do both steps.</p> |
| 13. | <p>Click Submit Requisition from the top right of the screen</p> <div style="border: 1px solid gray; padding: 2px 10px; background-color: #0056b3; color: white; margin-top: 10px; display: inline-block;">Submit Requisition</div> |

D – Adding Notes, Attachments & Special Requests to Orders

Introduction

Some orders in Mustang Market may not follow standard processes and in these cases you will need to add notes or attachments for Financial Services, the vendor or others in your department who review / approve the order.

Some examples of this might be:

- Adding a note or attachment for Procurement or Accounts Payable
- Sending the vendor an attachment
- Attaching a note to the order for the approver
- Requesting that a payment is made in a different way than is setup on the system

This section provides the steps to add these types of special requests on your order or payment request.

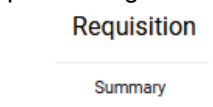
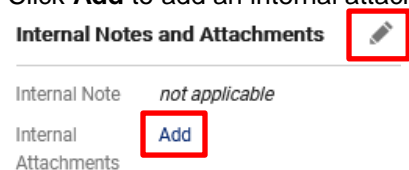
Adding Internal notes and

Internal notes are used to communicate to Procurement and Accounts Payable. You might use this to indicate payment or tax handling instructions.

attachments
(Procurement
and Accounts
Payable at
Western)

Internal attachments are not shared with the vendor, but can also be viewed by the Requisitioner and Approver on the order.

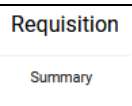
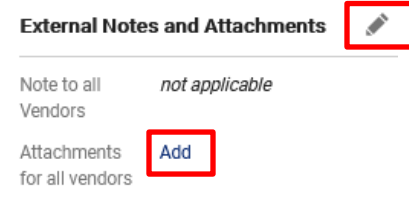
To add internal notes or attachments follow the steps in the table below.

| Step | Action |
|------|--|
| 1. | Click on the 'Requisition', Summary tab, after proceeding to checkout,  |
| 2. | Scroll down to the Internal Notes and Attachments section <ul style="list-style-type: none"> Click the edit icon to add an internal note. Type in your note Click Save. Click Add to add an internal attachment.  |

Adding
external notes
and
attachments
(Vendors)

External notes are used to communicate to the vendor. You might use this to include instructions or more information on your order, such as delivery instructions or customer account numbers.

External attachments might be used to send a quote or contract document to the vendor, along with your purchase order.



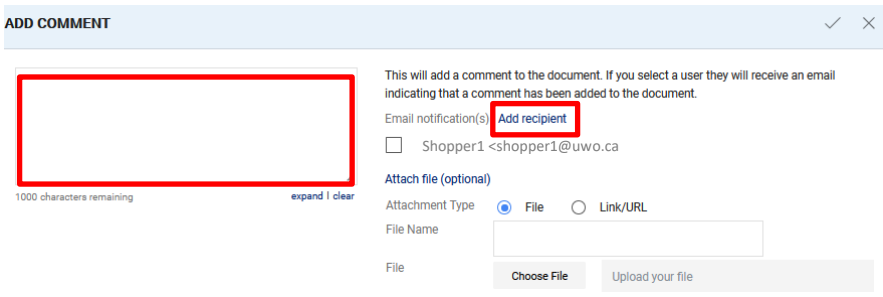
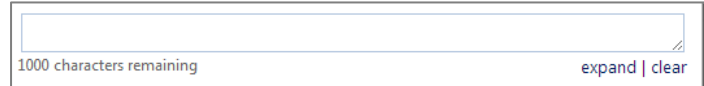
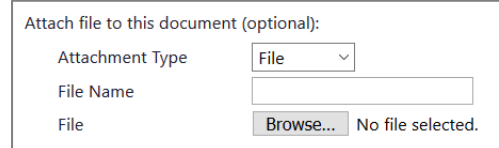


| Step | Action |
|------|---|
| 1. | Click on the 'Requisition', Summary tab, after proceeding to checkout,  |
| 2. | Scroll down to the External Notes and Attachments section <ul style="list-style-type: none"> Click the edit icon to add an external note. Type in your note Click Save Click Add to add an external attachment.  |

Adding
comments for
others in the

Comments can be added to purchase requisitions, purchase orders, and vouchers. Comments provide a way for users to communicate any questions or directions they have to other users. Any user in Mustang Market can be added as a recipient.

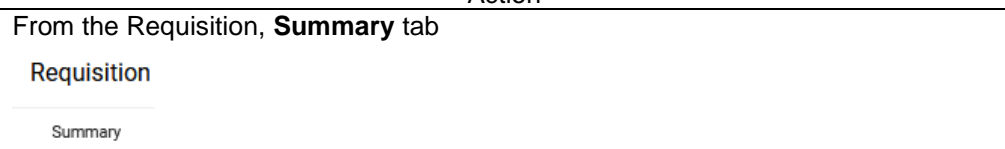
review /
approval
process



To add comments to a requisition, follow the steps in the table below.

| Step | Action |
|------|---|
| 1. | <p>Click the Comments tab, after proceeding to checkout and entering the Accounting Codes and Shipping/Billing address.</p>  |
| 2. | <p>Click the + button to add a comment</p>  |
| 3. | <p>Click checkboxes for the users that you would like notified of the comment via email.</p> <ul style="list-style-type: none"> Click add recipient to add someone additional  |
| 4. | <p>Enter the Comments in the text box</p> <ul style="list-style-type: none"> Max 1,000 characters  |
| 5. | <p>Attach a file, if applicable</p>  |
| 6. | <p>Click the checkmark to save the comment</p> <ul style="list-style-type: none"> The appropriate people will be emailed If an attachment was added on the comments tab, the number of attachments will be indicated on the attachment tab  |
| 7. | <p>Click Submit Requisition</p>  |

Requesting
alternative
payment
methods or
change in
taxes

There are some instances where a requisition may need to be reviewed by Procurement. To send a requisition to Procurement, follow the steps in the table below.

| Step | Action |
|------|--|
| 1. | <p>From the Requisition, Summary tab</p>  |

| | <p>General </p> <ul style="list-style-type: none"> Click the edit icon beside the General section and scroll down to the Procurement Request section | | | | | | |
|--|--|--------|----------|--|----------------------------------|--|------------------------------|
| 2 | <p>Click the appropriate box(es):</p> <table border="1" data-bbox="456 327 1417 546"> <thead> <tr> <th data-bbox="456 327 1021 359">If....</th> <th data-bbox="1021 327 1417 359">Then....</th> </tr> </thead> <tbody> <tr> <td data-bbox="456 359 1021 449">A tax exception applies to the order (i.e. order is for books, newspapers, salaries)</td> <td data-bbox="1021 359 1417 449">Click Send for Tax Review</td> </tr> <tr> <td data-bbox="456 449 1021 546">You need an alternative payment method (i.e. vendor does not accept PO's), or the order is for a research item</td> <td data-bbox="1021 449 1417 546">Click Send for Review</td> </tr> </tbody> </table> <p style="text-align: center;">Procurement Request</p> <hr/> <p style="text-align: center;">Send for Tax Review <input data-bbox="1214 632 1260 678" type="checkbox"/></p> <p style="text-align: center;">Send for Review <input data-bbox="1214 709 1260 756" type="checkbox"/></p> | If.... | Then.... | A tax exception applies to the order (i.e. order is for books, newspapers, salaries) | Click Send for Tax Review | You need an alternative payment method (i.e. vendor does not accept PO's), or the order is for a research item | Click Send for Review |
| If.... | Then.... | | | | | | |
| A tax exception applies to the order (i.e. order is for books, newspapers, salaries) | Click Send for Tax Review | | | | | | |
| You need an alternative payment method (i.e. vendor does not accept PO's), or the order is for a research item | Click Send for Review | | | | | | |
| 3. | Click Save | | | | | | |
| 4. | <p>Scroll down to Internal Notes and Attachments</p> <ul style="list-style-type: none"> Click the edit icon Add a note to indicate the reason this checkbox was selected. Click Save <p style="text-align: center;">Internal Notes and Attachme. </p> <hr/> <p style="text-align: center;">Internal Note <i>not applicable</i></p> | | | | | | |
| 5. | <p>Click Submit the Requisition</p> <p style="text-align: center;"><input data-bbox="456 1157 873 1203" type="button" value="Submit Requisition"/></p> | | | | | | |

E - Ordering from a New Vendor or Making Changes to an Existing Vendor

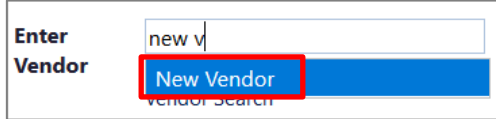


Introduction

A vendor will need to be entered as a “New Vendor” when you complete any order form if:

- The vendor cannot be found in the Mustang Market database
- There are changes to vendor information (address, payment, contact, etc.)

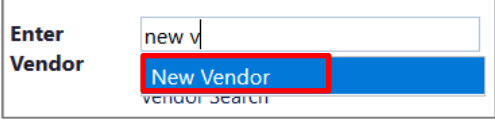
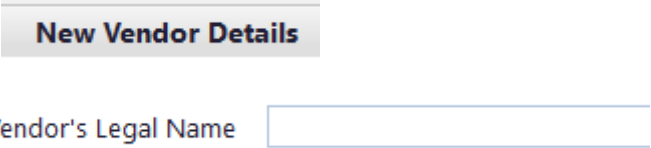

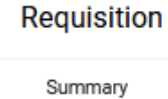

How to enter a new vendor

To enter a new vendor, select the applicable form and follow the steps in the table below.

| Step | Action |
|------|--|
| 1. | <p>Type in “new vendor” in the ‘Enter Vendor’ field</p> <ul style="list-style-type: none"> • Select New Vendor from the drop down menu  |
| 2. | <p>On the right side of the form under the New Vendor Details section:</p> <p>New Vendor Details</p> <ul style="list-style-type: none"> • Complete as much information as possible. Missing information will delay setting up the new vendor. <ul style="list-style-type: none"> ○ Vendor Name ○ GST/HST Reg# ○ Conflict of Interest (COI) – for details about COI, refer to the COI information found at: https://www.uwo.ca/finance/procurement/ethical_procurement_practices.html ○ Preferred Payment Method* ○ Vendor Payment Address ○ Vendor Contact Information <p>*Procurement Services will contact the vendor directly to obtain required banking information. Please do not email or attach this information (unless included on an invoice).</p> |
| 3. | <p>Complete the rest of the form</p> <ul style="list-style-type: none"> • Refer to the applicable topic in the ‘Table of Contents’ for details about completing the specific form you are completing. |
| 4. | <p>Click Add and go to Cart from the top of the page</p> <ul style="list-style-type: none"> • This takes you back to the shopping cart view  |
| 5. | <p>Click Submit Requisition</p>  |

How to make changes to an existing vendor

To make a change to an existing vendor, open the applicable form and follow the steps in the table below.

| Step | Action |
|------|--|
| 1. | <p>In the Enter Vendor field, type in “new vendor”</p> <ul style="list-style-type: none"> Select New Vendor from the drop down list  |
| 2. | <p>On the right side of the form under the New Vendor Details section,</p> <ul style="list-style-type: none"> Enter the existing vendor’s vendor name and number/ID in the vendor name field. Indicate the information that has changed in the appropriate field(s).  |
| 3. | <p>Click Add and go to Cart from the top of the page</p> <ul style="list-style-type: none"> This takes you back to the shopping cart view  |
| 4. | <p>From the 'Requisition', Summary Tab</p>  <ul style="list-style-type: none"> Add Internal Notes to further explain the change, refer to the ‘Adding Internal Notes’ section for details. |
| 5. | <p>Click Submit Requisition</p>  |

F - Other Tools to Simplify Shopping

Introduction

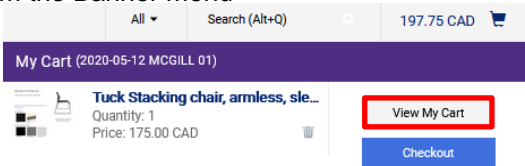
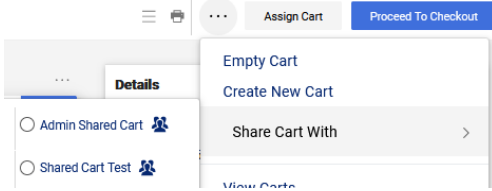
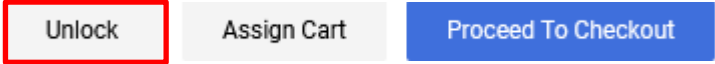
A few tools can simplify the shopping experience:

- sharing a single cart across a department can consolidate orders,
- copying a cart reduces the need to look up items again,
- using multiple speedcodes and / or accounts on an order, or for each item and
- adding commonly purchased items to Favourites folder can speed up the purchase process.

The steps for each of these tasks can be found in the following section.

How to share a cart

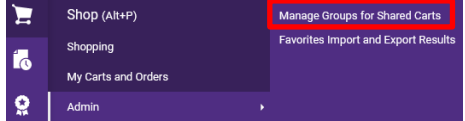
You can share a cart at any time during the shopping process. To share a cart, follow the instructions in the table below.


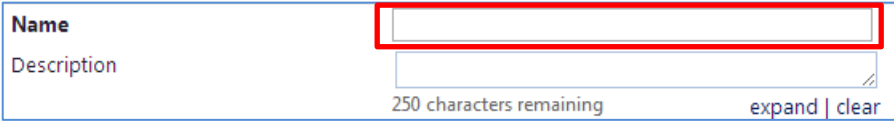
| Step | Action |
|------|--|
| 1. | <p>Click the Shopping Cart icon, from the Banner menu</p> <ul style="list-style-type: none"> • Click on View My Cart  |
| 2. | <p>Click on the action menu (...)</p> <ul style="list-style-type: none"> • Click Share my cart with and select the group's name  <ul style="list-style-type: none"> • Click Unlock, from the top right of the screen, so others will be able to use the cart  |

Note: When you share a cart it will be saved and accessible from the **Shared Carts** tab, after you click the **Shop** menu and select '**My Carts and Orders**', and then select, '**View Carts**'.

Creating another group to share a cart / edit existing group

To create another Group to share a cart with, or edit the original group, follow the instructions in the table below.

| Step | Action |
|------|---|
| 1. | <p>Click the Shopping Cart icon, from the Navigation Bar</p> <ul style="list-style-type: none"> • Select Admin, then Manage Groups for Shared Carts  |

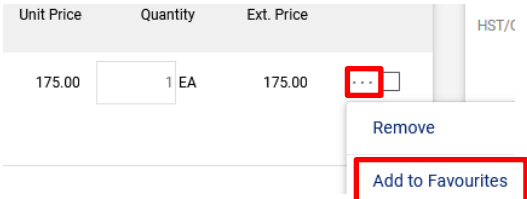
| | | |
|----|--|---|
| 2. | Click Create New Group |  |
| 3. | Type a Name for the Shared Cart |  |
| 4. | If you want to add | Then.... |
| | Individual users | Click User <ul style="list-style-type: none"> Type the “last name” of the user(s) you want to add Click Search Click select to the right of the name(s) Click Add Selected Users |
| | An entire department | Click Department <ul style="list-style-type: none"> Select Department Name from the drop down list |
| 5. | Click Save | |

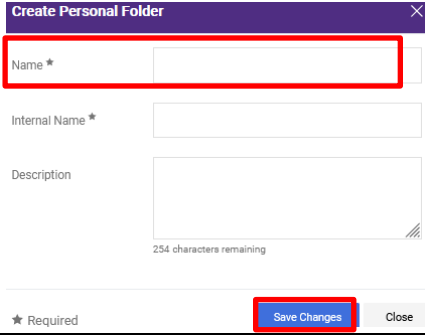
Creating a list of frequently purchased items (favourites)

There may be some items you frequently need to purchase; these items can be added to a list of favourites so that you can easily add them to a cart, instead of looking them up each time.

The first time you add something to favourites you will have to set up a folder for it to go into. You can add additional folders at any time; this is a great way to separate out item types.

To create a list of favourites follow the steps in the table below.

| Step | Action |
|------|--|
| 1. | From a Shopping Cart <ul style="list-style-type: none"> Click Add to Favourites beside the item you want to put in a favourites list  |
| 2. | Click New folder icon <ul style="list-style-type: none"> Top level personal folder <ul style="list-style-type: none"> those with permission can also add Shared folders to be used across departments Top level personal folder Top level shared folder Subfolder of selected folder Create New <p>NOTE: Once you create a top level folder under personal, you can create subfolders</p> |

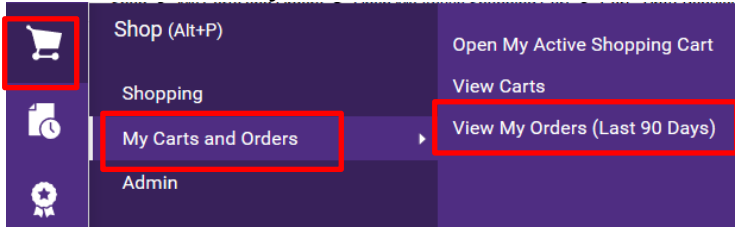
| | |
|----|---|
| | |
| 3. | <p>Type a Name for the folder</p> <ul style="list-style-type: none"> Click Save Changes  |
| 4. | <p>Click on the new folder created</p> <ul style="list-style-type: none"> Click Save Changes <ul style="list-style-type: none"> The item selected is added to the favourites folder. |
| 5. | <p>Click Close and continue shopping</p> |

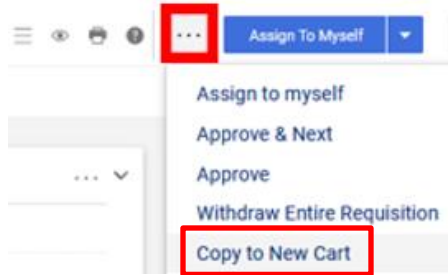
Copying an order

There may be times when most or all of a purchase is going to be repeated, when this is the case, you can copy the purchase requisition instead of searching for each item again. Once you copy the requisition, you can add additional items, or remove items you don't want.

Note: This works for hosted vendors and form orders, it does not work for most punch-out vendors.

To copy a requisition, follow the instructions in the table below.

| Step | Action | | | | | | | | | | | | |
|--------------------|--|------------------------------|--------|------------------|---------|--------------------|------------------------------|---------|----------------------|------------------------------|---------|----------------------|------------------------------|
| 1. | <p>Hover over the Shop icon in the Navigation Bar</p> <ul style="list-style-type: none"> Select My Carts and Orders Select View My Orders  | | | | | | | | | | | | |
| 2. | <p>Click on the Requisition Number for the cart you want to copy</p> <ul style="list-style-type: none"> Look at the vendor details, date, and total cost to help you select the correct cart <table border="1" data-bbox="500 1577 1305 1759"> <thead> <tr> <th>Requisition Number</th> <th>Vendor</th> <th>Requisition Name</th> </tr> </thead> <tbody> <tr> <td>2866842</td> <td>Staedtler-Mars Ltd</td> <td>2020-01-15 requisitioner1 03</td> </tr> <tr> <td>2866685</td> <td>Agilent Technologies</td> <td>2020-01-15 requisitioner1 02</td> </tr> <tr> <td>2845395</td> <td>Procurement Services</td> <td>2019-12-09 requisitioner1 05</td> </tr> </tbody> </table> | Requisition Number | Vendor | Requisition Name | 2866842 | Staedtler-Mars Ltd | 2020-01-15 requisitioner1 03 | 2866685 | Agilent Technologies | 2020-01-15 requisitioner1 02 | 2845395 | Procurement Services | 2019-12-09 requisitioner1 05 |
| Requisition Number | Vendor | Requisition Name | | | | | | | | | | | |
| 2866842 | Staedtler-Mars Ltd | 2020-01-15 requisitioner1 03 | | | | | | | | | | | |
| 2866685 | Agilent Technologies | 2020-01-15 requisitioner1 02 | | | | | | | | | | | |
| 2845395 | Procurement Services | 2019-12-09 requisitioner1 05 | | | | | | | | | | | |
| 3. | <p>Select Copy to New Cart from the actions menu at the top right of the Requisition page</p> | | | | | | | | | | | | |

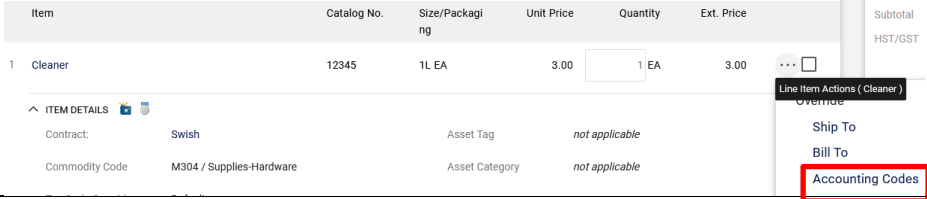
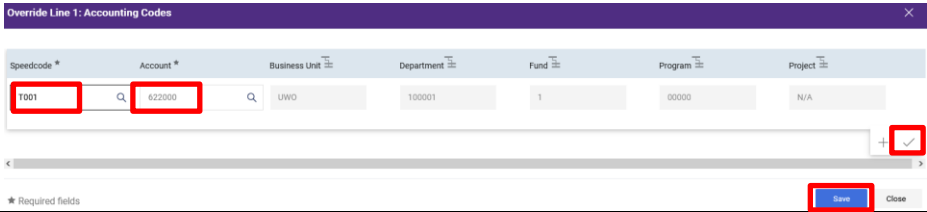

| | |
|----|---|
| |  |
| 4. | <p>Continue Shopping and / or</p> <ul style="list-style-type: none"> ○ Remove items as needed by clicking on More Actions and selecting Remove ● Click Proceed to Checkout and submit your requisition once you have the items you want to purchase in your cart |

NOTE: You can also use document search / orders to look up a requisition, once you have located the requisition you want to copy, follow steps 2-4 above.

Using different speedcodes for each item in the same order

When you want to charge a specific item(s) to a different account or speedcode than the rest of the order you have to add the account and speedcode to *each* line.

To attach different speedcodes / accounts to items follow the steps in the table below.

| Step | Action |
|------|---|
| 1. | Shop the site as normal, when you are finished: <ul style="list-style-type: none"> ● Click Proceed to checkout |
| 2. | Click on the 'Requisition', Summary tab, after proceeding to checkout, <p style="text-align: center;">Requisition</p> <p style="text-align: center;">Summary</p> |
| 3. | Scroll down to the first line item <ul style="list-style-type: none"> ● Click the Edit menu for the line and select Accounting Codes  |
| 4. | Enter the Speedcode and Account for that item <ul style="list-style-type: none"> ● Click recalculate / validate value ● Click Save  |
| 5. | Repeat Step #3 & 4 until all of the items have speedcodes and accounts attached them |
| 6. | Click Submit Requisition  |

NOTE: When you use different speedcodes in one order, the order may need to go to different Approvers and will automatically be directed. If multiple approvers are required, the order may take longer to approve and be sent to the vendor to fulfill. Refer to the section ['Finding the status of the requisition'](#) to see where it is the approval process.



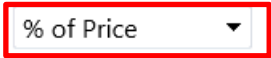
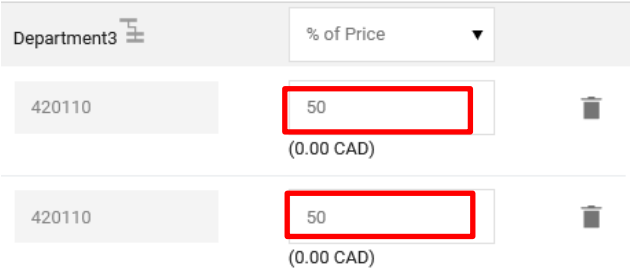

Using multiple speedcodes for the entire order (header account splits)

Carts and Requisitions can be split between different speedcode/accounts at the header level, meaning that the entire cost of the entire order will be distributed to two or more accounts / speedcodes.

For example:


- If a requisition subtotal is \$9000 and one account has \$4000 left in it, the order can be split with \$4000 applied to the limited account and \$5000 applied to another account,
 - You can also allocate cost using percentages of the requisition subtotal

To create a split, follow the steps in the table below.

| Step | Action |
|------|--|
| 1. | Shop the site as normal, when you are finished: <ul style="list-style-type: none"> • Click Proceed to checkout |
| 2. | Click the Edit icon in the <i>Accounting Codes</i> section  Accounting Codes Speedcodes must be entered in all capital letters Speedcode Account Business Unit Department Approval Department Fund Program Project Department3 Click the Add Split icon (plus sign) on the far right of the Speedcode window  |
| 3. | Click the % of Price drop down, select: <ul style="list-style-type: none"> • % of Quantity • Amount of Price or • % of Price, depending upon the split type you want to enter NOTE: you need to calculate the exact dollar / % / quantity for ALL splits, the system will not enter the 'remainder' in to the last line.  |
| 4. | Enter new Speedcode , and / or Account if needed, and <ul style="list-style-type: none"> • % / Amount / Quantity beside each line  |
| 5. | Click Save |
| 6. | Click Submit Requisition  |

Selecting an off-

If the ship-to address is not available under the organizational options, you may select the "Off-Campus" option to enter a custom address. Please note that all orders with this address code will be sent to Procurement for review.

| Step | Action |
|------|---|
| 1. | <p>On the Requisition Summary screen, select the edit icon beside the Shipping/Billing section.</p> <p style="text-align: center;">Shipping/Billing </p> |
| 2. | <p>Scroll down to the Shipping address code field and then:</p> <ul style="list-style-type: none"> Type in “off-campus” and click on the option that pops up <div style="border: 1px solid red; padding: 5px; margin: 5px 0;"> <p>Off-Campus Deliveries - [ATTN:*], [Room,</p> </div> <div style="border: 1px solid red; padding: 5px; margin: 5px 0;"> <p>off-campus X Q F</p> </div> <p>Shipping address code</p> |
| 3. | <p>Enter the ship-to address information. * fields are mandatory. Once completed, click Save.</p> <div style="border: 1px solid #4a4a8a; padding: 10px; margin: 10px 0;"> <p>Edit Shipping/Billing</p> <p>ATTN: * <input type="text"/></p> <p>Room, Suite, Fl: <input type="text"/></p> <p>Building: <input type="text"/></p> <p>Dept: <input type="text"/></p> <p>Dock: <input type="text"/></p> <p>Address Line 1 * <input type="text"/></p> <p>City * <input type="text"/></p> <p>Province <input type="text" value="ON"/></p> <p>Postal Code * <input type="text"/></p> <p>Country <input style="border-bottom: none;" type="text" value="Canada"/> ▼</p> </div> |

G - Finding and Re-submitting Returned Requisitions

Introduction

When your requisition is returned, you will receive details explaining the reason. You can open up the requisition, amend it and re-submit it for approval. There may be times when you want Procurement to review your order as well. This section outlines details for each situation and the steps to take.

Why a requisition may be returned to you

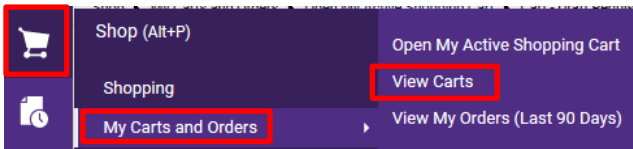
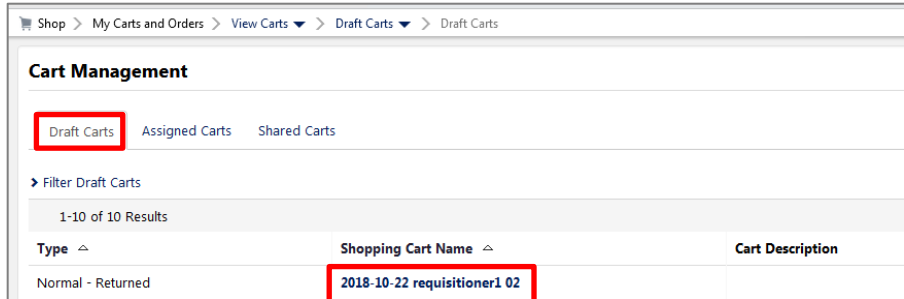
The system may automatically return a requisition for a number of reasons, including:

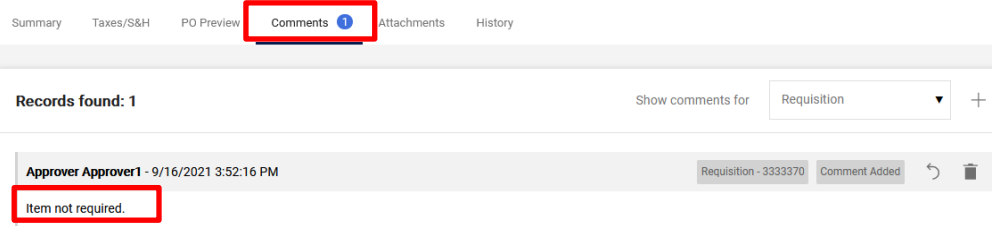
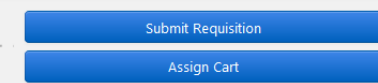
- No budget set up for speedcode/account code combination
- Requisition is over \$25K but the Competitive Bid Requirements section was not completed
- Requisition is returned to you by the assigned Requisitioner, by your Approver, or by Procurement

When a requisition is returned, you will receive an email with the reason. You can also view the reason on the History tab of the requisition document.

Finding and re-submitting a returned requisition

To locate a returned requisition, follow the steps listed in the table below.

| Step | Action |
|------|---|
| 1. | <p>Click the Shopping Cart icon on the left menu</p> <ul style="list-style-type: none">• Click My Carts and Orders• Click on View Carts  |
| 2. | <p>Click on the Draft Carts tab,</p> <ul style="list-style-type: none">• Find the returned requisition<ul style="list-style-type: none">○ Click on the requisition (hyperlink) under the 'Shopping Cart Name' column  |

| | |
|------------------|--|
| <p>3.</p> | <p>Click on the Comments tab and read the comments</p> <ul style="list-style-type: none"> This explains why the requisition was returned. <p>Note: you can also click on the History tab to find more information about why your requisition was returned.</p>  |
| <p>4.</p> | <p>Complete any required changes and once done,</p> <ul style="list-style-type: none"> Select Submit Requisition or Click Assign Cart to resubmit your requisition to the original Requisitioner, if applicable. <ul style="list-style-type: none"> Search for and select the appropriate Requisitioner Click Assign  |

H - Working with Carts Sent to You for Review (Assigned Carts)

Introduction

The term Requisitioner is used to describe someone that is responsible for reviewing a shopping cart and attaching a speedcode and account to it, as well as providing the first level of approval for the order. The Requisitioner creates the purchase requisition that goes to the Approver and on to become the purchase order that is sent to the vendor for fulfillment.

Actions associated with assigned carts

The following actions can be taken by a Requisitioner for a shopping cart assigned (sent) to them:

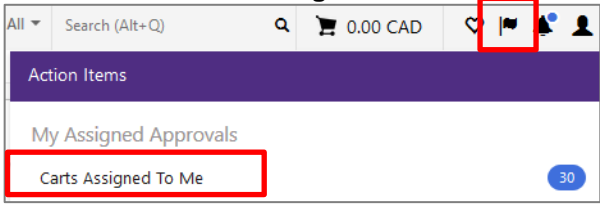


- The entire cart can be submitted for approval.
- One or more line items in the cart can be rejected.
 - If part of a cart is rejected (one or more line items), the remaining line items continue in the process.
- Comments and attachments can be sent “back and forth” between Requisitioners and Shoppers during the review process.

If a line item or the entire requisition is rejected, the rejection notice will show up in the History tab. If the user is set up to receive email notifications for rejections, they will also receive an email that contains the rejection reason.

View draft carts assigned to you

Once the Shopper’s cart is assigned to a Requisitioner, the Requisitioner it is assigned to sees a notification indicator and an action indicator in Mustang Market, and receives an email letting them know that a cart was assigned to them, if email notifications are turned on in their profile settings.

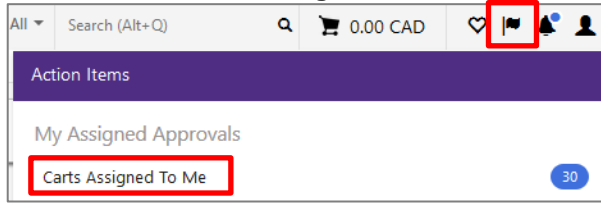

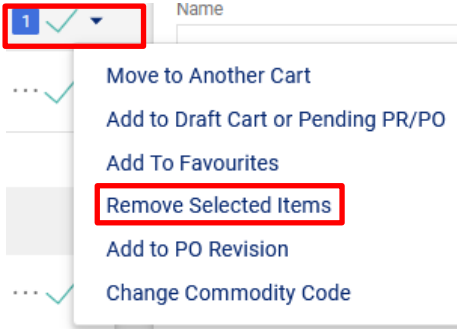
To review draft carts assigned to you follow the steps in the table below.

| Step | Action |
|------|--|
| 1. | Click the Action Items from the Banner area <ul style="list-style-type: none"> • Select Carts Assigned to Me  |
| 2. | Click on a “ Shopping Cart Name ” on the ‘Assigned Carts’ tab <ul style="list-style-type: none"> • Review the items in the cart  |
| 3. | Click Proceed to Checkout  |
| 4. | From the ‘Requisition’, Summary tab, <ul style="list-style-type: none"> • Review / Edit the information as needed, including: <ul style="list-style-type: none"> ○ General info |

| | |
|----|---|
| | <ul style="list-style-type: none"> ○ Shipping Address ○ Accounting Codes ○ Internal / External Notes and Attachments ○ Vendor / Line item details |
| 5. | Click Submit to create the requisition order <div style="text-align: center;">Submit Requisition</div> |

Removing an item from a cart assigned to you

To remove an item from a shopping cart that has been assigned to you, follow the steps in the table below.



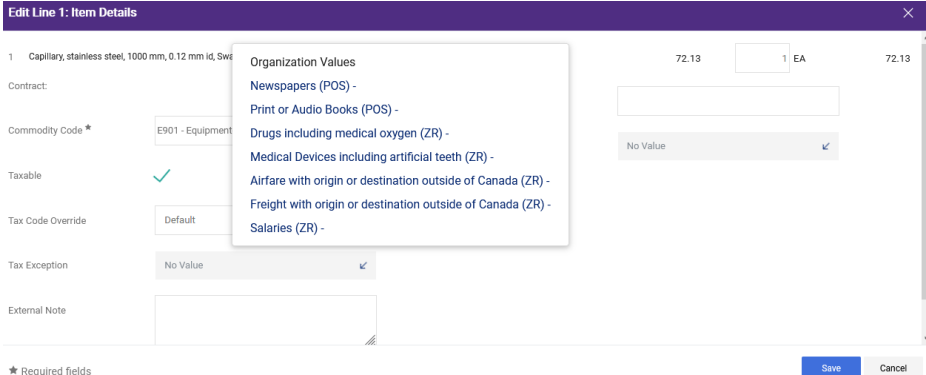
| Step | Action | | | | | | | | |
|------------|--|------------|------------------------------|------------|--|--------|------|--------|------------------------------|
| 1. | Click Action Items from the Banner area <ul style="list-style-type: none"> • Select Carts Assigned to Me  | | | | | | | | |
| 2. | Click on a ' Shopping Cart Name ' on the 'Assigned Carts' tab <ul style="list-style-type: none"> • Review the items in the cart  | | | | | | | | |
| 3. | Click check box to the right of the line item to be removed <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="width: 25%;">Unit Price</th> <th style="width: 25%;">Quantity</th> <th style="width: 25%;">Ext. Price</th> <th style="width: 25%;"></th> </tr> </thead> <tbody> <tr> <td style="text-align: center;">999.20</td> <td style="text-align: center;">1 PC</td> <td style="text-align: center;">999.20</td> <td style="text-align: center;">... <input type="checkbox"/></td> </tr> </tbody> </table> | Unit Price | Quantity | Ext. Price | | 999.20 | 1 PC | 999.20 | ... <input type="checkbox"/> |
| Unit Price | Quantity | Ext. Price | | | | | | | |
| 999.20 | 1 PC | 999.20 | ... <input type="checkbox"/> | | | | | | |
| 4. | Click the action menu '(# item selected)' drop down arrow <ul style="list-style-type: none"> • Select Remove Selected Items  | | | | | | | | |
| 5. | Click Proceed to Checkout <div style="text-align: center;">Proceed to Checkout</div> | | | | | | | | |
| 6. | Finish reviewing the requisition and then <ul style="list-style-type: none"> • See the section 'View draft carts assigned to you' for details | | | | | | | | |

| | |
|----|---------------------------------|
| 7. | Click Submit Requisition |
|----|---------------------------------|



Requesting tax exceptions or exemptions

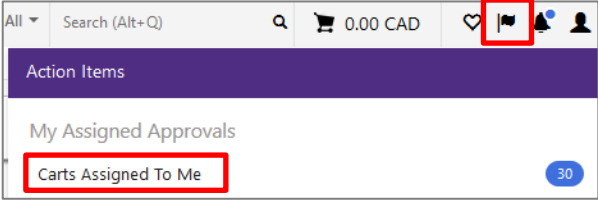
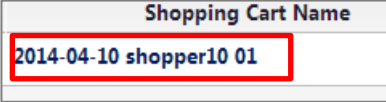
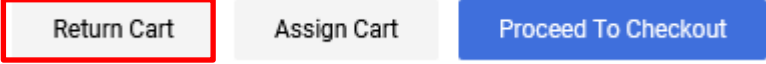
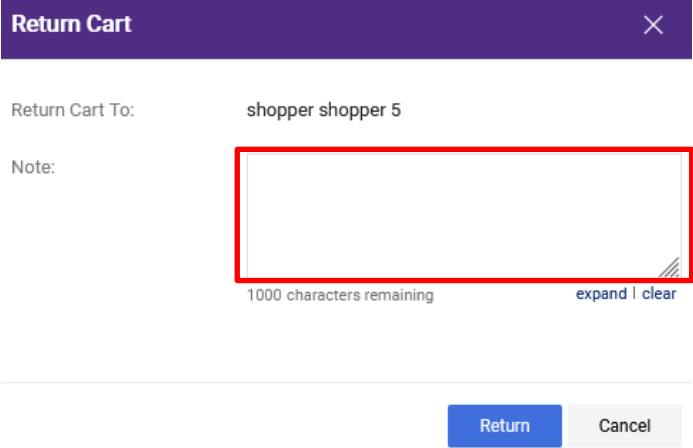
Tax exceptions and exemptions can only be made on a requisition by Procurement. To indicate that a tax exception is applicable, follow the instructions in the table below.

| Step | Action |
|------|--|
| 1. | <p>On the Requisition Summary screen, select the edit button in the Procurement Request section</p> <p>General </p> <ul style="list-style-type: none"> • Scroll down to the Procurement Request section <p>Procurement Request</p> <p>Send for Tax Review <input type="checkbox"/></p> <p>Send for Review <input type="checkbox"/></p> |
| 2. | <p>Check off the “Send for Tax Review” checkbox</p> <ul style="list-style-type: none"> • Click Save <p>Procurement Request</p> <p>Send for Tax Review <input checked="" type="checkbox"/></p> <p>Send for Review <input type="checkbox"/></p> |
| 3. | <p>Add an Internal Note to explain the tax exception</p> <p>Internal Notes and Attachments </p> <p>Internal Note <i>not applicable</i></p> |
| 3. | <p>To indicate the tax exception reason, scroll down to the item you are purchasing</p> <ul style="list-style-type: none"> • Click Edit to the right of the item • Select a Reason from the drop down menu • Click save  |

How to return a cart to the Shopper

You may need to return a cart to the original Shopper to have him/her make a change, for example to change a line item or a speedcode.

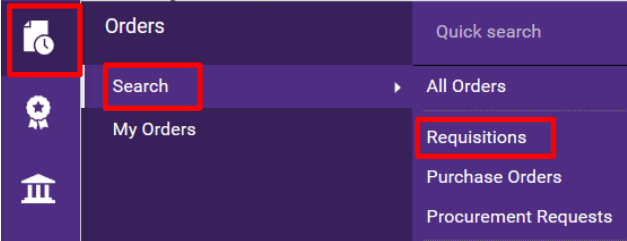

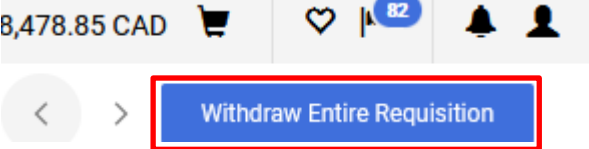
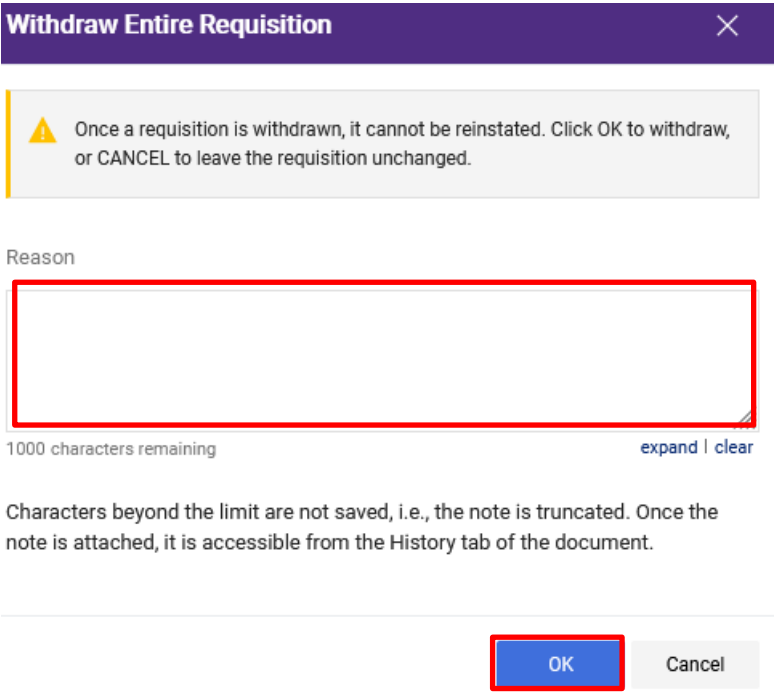
To return a shopping cart, follow the instructions in the table below.

| Step | Action |
|------|---|
| 1. | <p>Click Action Items from the Banner area</p> <ul style="list-style-type: none"> Select Carts Assigned to Me  |
| 2. | <p>Click on 'Shopping Cart Name' from the 'Assigned Carts' tab</p> <ul style="list-style-type: none"> Review the items in the cart  |
| 3. | <p>Click Return Cart from the top of the screen</p>  |
| 3. | <p>Enter Notes to explain the reason for the cart return</p> <ul style="list-style-type: none"> Click Return button  |

How to withdraw a requisition

You can withdraw your requisition as long as it is still in pending status, i.e. it has not become a purchase order.

To withdraw a requisition, follow the steps in the table below.

| Step | Action |
|------|---|
| 1. | <p>Hover over the Order icon from the Navigation bar on the left</p> <ul style="list-style-type: none"> Click Search Click Requisitions  |
| 2. | <p>Click the Requisition Number</p>  |
| 3. | <p>Click Withdraw Entire Requisition from the top right of the requisition</p>  |
| 4. | <p>Enter the Comment indicating the reason for the withdraw</p> <ul style="list-style-type: none"> Click OK  |

I – Finding an Order, Requisition or Invoice

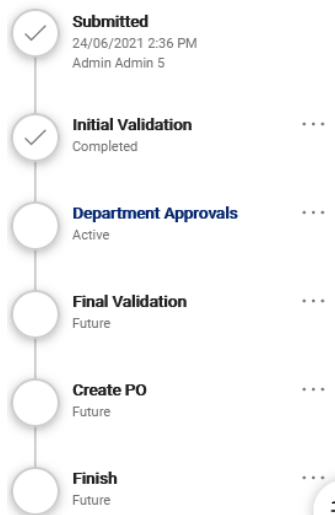
Introduction

Workflow describes the steps a document goes through in Mustang Market from the creation of a draft cart to the submission of the order to the vendor. It is helpful to know the workflow so you can see where your order or invoice is in workflow. This lets you know who to follow up with when needed.

Typical workflow of an order

Even a typical workflow can vary depending upon a number of things, such as the setup requested by the department / faculty, the spending limit of the Requisitioner or Approver, and the type of purchase being made. i.e. office supplies versus chemical products or for a CFI project.

Generally speaking, a draft cart is submitted and goes through the process outlined in the graphic below.



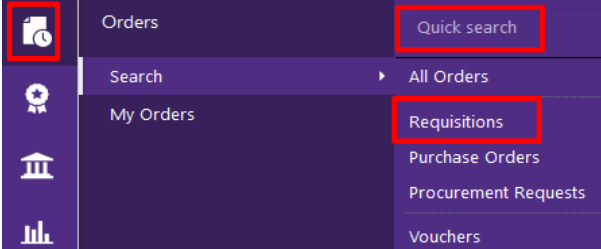
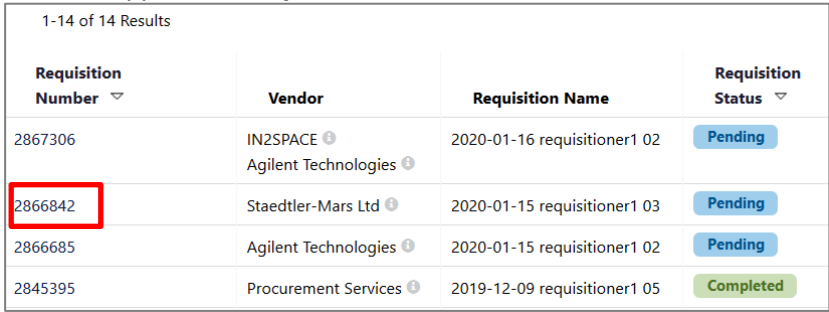
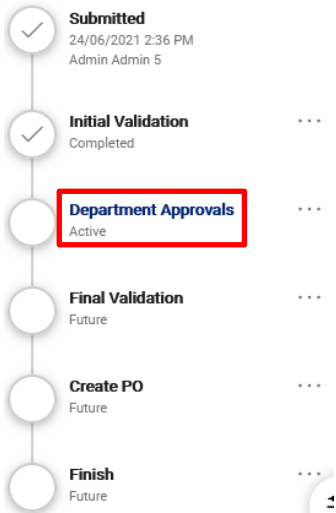
The stages of workflow may include:

- **Initial Validation** – this is a system check that ensures the account selected to pay for the purchase has budget for the current fiscal year
- **Department or Researcher Approvals** – all orders placed by Shoppers or Requisitioners require review and or approval and are directed to the appropriate department or research approver based on the speedcode used for the purchase
- **Procurement** – orders are automatically routed to Procurement for a number of reasons including purchase of biohazardous materials, consulting, new vendor, and when 'Send for review' is selected prior to the requisition being submitted.
- **Research Finance** – purchases made on research account that may require additional research finance review
- **Final Validation** – this is another system check that confirms there is budget for the current fiscal year

Once the order passes the Final Validation workflow, a Purchase Order is automatically created and sent to the vendor to fulfill.

Finding the status of the requisition

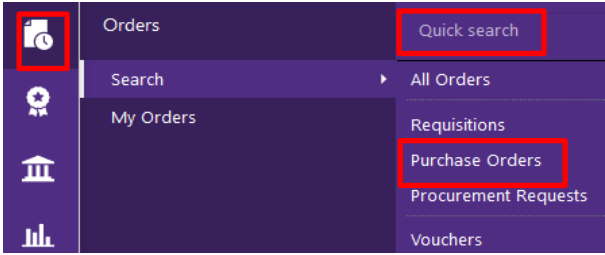
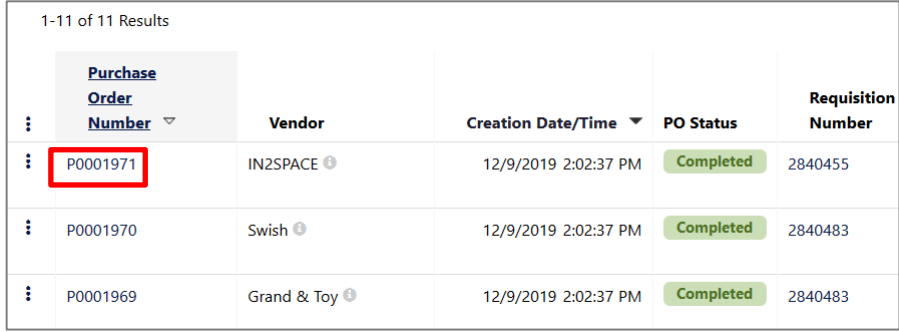
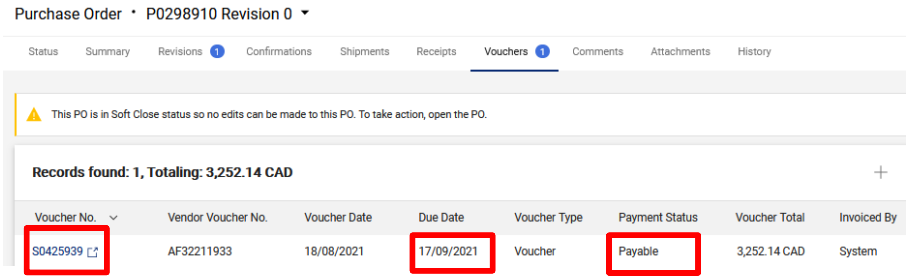
To look up the status of your requisition and see who needs to approve it, follow the instructions in the table below.

| Step | Action | | | | | | | | | | | | | | | | | | | | |
|--------------------|---|------------------------------|--------------------|------------------|--------------------|---------|----------------------------------|------------------------------|---------|---------|--------------------|------------------------------|---------|---------|----------------------|------------------------------|---------|---------|----------------------|------------------------------|-----------|
| 1. | <p>To find the related requisition: Hover over the Orders icon on the Navigation Bar on the left</p> <ul style="list-style-type: none"> And either: <ul style="list-style-type: none"> Click in the Quick search field Enter the requisition number if known, <p>OR</p> <ul style="list-style-type: none"> Click Requisitions to see a list of Requisitions submitted by you  | | | | | | | | | | | | | | | | | | | | |
| 2. | <p>Click the applicable Requisition Number</p>  <table border="1" data-bbox="495 850 1318 1159"> <thead> <tr> <th>Requisition Number</th> <th>Vendor</th> <th>Requisition Name</th> <th>Requisition Status</th> </tr> </thead> <tbody> <tr> <td>2867306</td> <td>IN2SPACE Agilent Technologies</td> <td>2020-01-16 requisitioner1 02</td> <td>Pending</td> </tr> <tr> <td>2866842</td> <td>Staedtler-Mars Ltd</td> <td>2020-01-15 requisitioner1 03</td> <td>Pending</td> </tr> <tr> <td>2866685</td> <td>Agilent Technologies</td> <td>2020-01-15 requisitioner1 02</td> <td>Pending</td> </tr> <tr> <td>2845395</td> <td>Procurement Services</td> <td>2019-12-09 requisitioner1 05</td> <td>Completed</td> </tr> </tbody> </table> | Requisition Number | Vendor | Requisition Name | Requisition Status | 2867306 | IN2SPACE Agilent Technologies | 2020-01-16 requisitioner1 02 | Pending | 2866842 | Staedtler-Mars Ltd | 2020-01-15 requisitioner1 03 | Pending | 2866685 | Agilent Technologies | 2020-01-15 requisitioner1 02 | Pending | 2845395 | Procurement Services | 2019-12-09 requisitioner1 05 | Completed |
| Requisition Number | Vendor | Requisition Name | Requisition Status | | | | | | | | | | | | | | | | | | |
| 2867306 | IN2SPACE Agilent Technologies | 2020-01-16 requisitioner1 02 | Pending | | | | | | | | | | | | | | | | | | |
| 2866842 | Staedtler-Mars Ltd | 2020-01-15 requisitioner1 03 | Pending | | | | | | | | | | | | | | | | | | |
| 2866685 | Agilent Technologies | 2020-01-15 requisitioner1 02 | Pending | | | | | | | | | | | | | | | | | | |
| 2845395 | Procurement Services | 2019-12-09 requisitioner1 05 | Completed | | | | | | | | | | | | | | | | | | |
| 3. | <p>In the requisition document, go to the workflow section on the right side of the requisition. On this screen you can see:</p> <ul style="list-style-type: none"> Completed, active, and future workflow steps Approvers – click on the active step, “Department Approvals” <ul style="list-style-type: none"> Tip: Use the Comments tab to send an email to the Approver  | | | | | | | | | | | | | | | | | | | | |

Finding the payment status of the invoice

Once an invoice has been processed by Accounts Payable, a Voucher document will be available in Mustang Market. Note: For additional invoice inquiries, please contact accountspayable@uwo.ca.

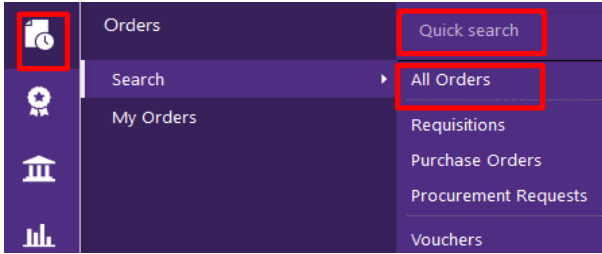
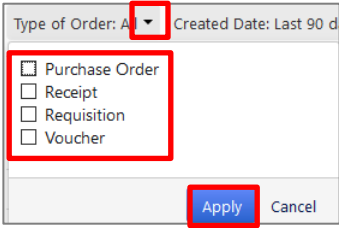
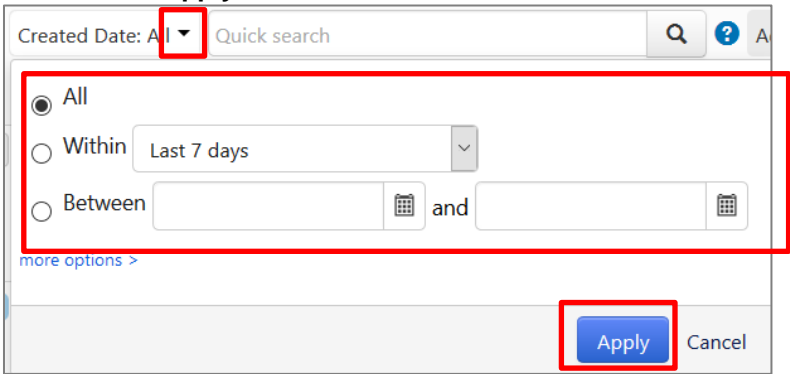
To look up the invoice and payment details, follow the instructions in the table below.

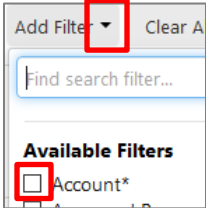

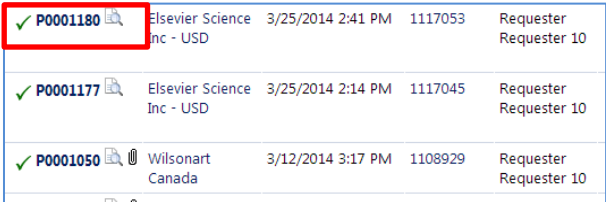
| Step | Action | | | | | | | | | | | | | | | | | | | | |
|-----------------------|--|-----------------------|--------------------|--------------------|----------------|--------------------|----------------|---------------|----------------------|-----------|------------|------------|------------|----------------------|-----------|--------------|----------|-------------|----------------------|-----------|---------|
| 1. | <p>Hover over the Orders icon on the Navigation Bar on the left</p> <ul style="list-style-type: none"> And either: <ul style="list-style-type: none"> Click in the Quick search field <ul style="list-style-type: none"> Enter a document number if known, <p>OR</p> <ul style="list-style-type: none"> Click Purchase Orders  | | | | | | | | | | | | | | | | | | | | |
| 2. | <p>Click the Purchase Order Number</p>  <table border="1"> <thead> <tr> <th>Purchase Order Number</th> <th>Vendor</th> <th>Creation Date/Time</th> <th>PO Status</th> <th>Requisition Number</th> </tr> </thead> <tbody> <tr> <td>P0001971</td> <td>IN2SPACE</td> <td>12/9/2019 2:02:37 PM</td> <td>Completed</td> <td>2840455</td> </tr> <tr> <td>P0001970</td> <td>Swish</td> <td>12/9/2019 2:02:37 PM</td> <td>Completed</td> <td>2840483</td> </tr> <tr> <td>P0001969</td> <td>Grand & Toy</td> <td>12/9/2019 2:02:37 PM</td> <td>Completed</td> <td>2840483</td> </tr> </tbody> </table> | Purchase Order Number | Vendor | Creation Date/Time | PO Status | Requisition Number | P0001971 | IN2SPACE | 12/9/2019 2:02:37 PM | Completed | 2840455 | P0001970 | Swish | 12/9/2019 2:02:37 PM | Completed | 2840483 | P0001969 | Grand & Toy | 12/9/2019 2:02:37 PM | Completed | 2840483 |
| Purchase Order Number | Vendor | Creation Date/Time | PO Status | Requisition Number | | | | | | | | | | | | | | | | | |
| P0001971 | IN2SPACE | 12/9/2019 2:02:37 PM | Completed | 2840455 | | | | | | | | | | | | | | | | | |
| P0001970 | Swish | 12/9/2019 2:02:37 PM | Completed | 2840483 | | | | | | | | | | | | | | | | | |
| P0001969 | Grand & Toy | 12/9/2019 2:02:37 PM | Completed | 2840483 | | | | | | | | | | | | | | | | | |
| 3. | <p>Click the Vouchers tab.</p> <p>To see any vouchers/invoices processed against the PO. On this screen you can see:</p> <ul style="list-style-type: none"> Voucher number Due Date Payment Status (processed or paid) <p>To view more information, click on the voucher number.</p>  <p>Purchase Order • P0298910 Revision 0 ▾</p> <p>Status Summary Revisions 1 Confirmations Shipments Receipts Vouchers 1 Comments Attachments History</p> <p>⚠ This PO is in Soft Close status so no edits can be made to this PO. To take action, open the PO.</p> <p>Records found: 1, Totaling: 3,252.14 CAD</p> <table border="1"> <thead> <tr> <th>Voucher No.</th> <th>Vendor Voucher No.</th> <th>Voucher Date</th> <th>Due Date</th> <th>Voucher Type</th> <th>Payment Status</th> <th>Voucher Total</th> <th>Invoiced By</th> </tr> </thead> <tbody> <tr> <td>S0425939</td> <td>AF32211933</td> <td>18/08/2021</td> <td>17/09/2021</td> <td>Voucher</td> <td>Payable</td> <td>3,252.14 CAD</td> <td>System</td> </tr> </tbody> </table> | Voucher No. | Vendor Voucher No. | Voucher Date | Due Date | Voucher Type | Payment Status | Voucher Total | Invoiced By | S0425939 | AF32211933 | 18/08/2021 | 17/09/2021 | Voucher | Payable | 3,252.14 CAD | System | | | | |
| Voucher No. | Vendor Voucher No. | Voucher Date | Due Date | Voucher Type | Payment Status | Voucher Total | Invoiced By | | | | | | | | | | | | | | |
| S0425939 | AF32211933 | 18/08/2021 | 17/09/2021 | Voucher | Payable | 3,252.14 CAD | System | | | | | | | | | | | | | | |

Finding a requisition, purchase order, or invoice

Using **Orders** you can search for: all documents, one type of document and / or provide a date range to search by. This is a useful search tool when you don't have a specific document number to search by or are reviewing multiple documents.

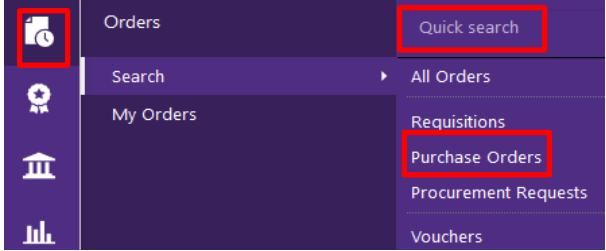
To conduct a simple document search follow the instructions in the table below.

| Step | Action |
|------|--|
| 1. | <p>Hover over the Orders icon on the Navigation Bar on the left</p> <ul style="list-style-type: none"> And either: <ul style="list-style-type: none"> Click in the Quick search field <ul style="list-style-type: none"> Enter a document number if known, <p>OR</p> <ul style="list-style-type: none"> Click All Orders or a specific document type to look up multiple documents or if the number is unknown  |
| 2. | <p>To look up specific document types , once you are on the All Orders screen,</p> <ul style="list-style-type: none"> Click the Type of Order drop down and Select one or more of the filters Click Apply  |
| 3. | <p>Click 'Date Created: All' drop down arrow</p> <ul style="list-style-type: none"> Enter / select a date range Click Apply  |

| | |
|----|---|
| 4. | <p>Click Add Filter to further narrow down your search</p> <ul style="list-style-type: none"> Select a filter  <ul style="list-style-type: none"> Enter the applicable filter information in the pop-up box that appears Click Apply  |
| 5. | <p>Click on the Document Number for the document you want to view</p> <ul style="list-style-type: none"> For example: P#### for purchase order R### for requisition V##### for voucher  |

Printing or resending an order

To resend the Purchase Order to a vendor, follow the steps in the table below.

| Step | Action |
|------|---|
| 1. | <p>Hover over the Orders icon on the Navigation Bar on the left</p> <ul style="list-style-type: none"> And either: <ul style="list-style-type: none"> Click in the Quick search field <ul style="list-style-type: none"> Enter a document number if known, <p>OR</p> <ul style="list-style-type: none"> Click Purchase Orders  |
| 2. | Click the Purchase Order Number |

1-11 of 11 Results

| Purchase Order Number | Vendor | Creation Date/Time | PO Status | Requisition Number |
|---------------------------------------|-------------|----------------------|-----------|--------------------|
| P0001971 | IN2SPACE | 12/9/2019 2:02:37 PM | Completed | 2840455 |
| P0001970 | Swish | 12/9/2019 2:02:37 PM | Completed | 2840483 |
| P0001969 | Grand & Toy | 12/9/2019 2:02:37 PM | Completed | 2840483 |

3. From the Purchase Order tab:
- Click the **actions** menu on the top right of the screen
 - Select **Print Fax Version**
 - This will bring up the official PO document in a new window.
 - From here, you can print or save the PO and then email it to the vendor.

