

## To Follow Up on A Requisition

Follow the navigation through the menu in the screen shot below.

The screenshot shows the 'Document Status' application in Microsoft Internet Explorer. The browser address bar displays 'http://ps-web2.cna.ni.ca/psg/fm/prd/EMPLOYEE/ERP/C/PROCUREMENT\_ANALYSIS.PRCR\_DOCSTAT\_REQ.GBL'. The page header includes the College of the North Atlantic logo and navigation links for Home, Worklist, Add to Favorites, and Sign out. A search bar is located at the top right. On the left, a 'Menu' sidebar is visible with categories like My Favorites, Vendors, Purchasing, Requisitions, and Document Status. The main content area is titled 'Requisition Document Status' and contains a search form with fields for Business Unit, Requisition ID, Requisition Status, Requisition Date, Origin, Requester, and Description. A 'Find an Existing Value' button is present above the search fields. Below the search fields are buttons for 'Search', 'Clear', 'Basic Search', and 'Save Search Criteria'. The Windows taskbar at the bottom shows the Start button, several open applications, and the system clock at 11:01 AM.

Key information related to the requisition number you are interested in following up on. For purposes of this example, I will use requisition 4213.

The screenshot shows the 'Document Status' application displaying details for a specific requisition. The browser address bar is the same as in the previous screenshot. The page header is identical. The 'Menu' sidebar is also visible. The main content area is titled 'Req DOC Status' and displays the following information:

- Business Unit:** CHANL
- Req ID:** 000004213
- Status:** Approved
- Document Date:** 03/14/2005
- Document Type:** Requisition
- Budget Status:** Valid
- Currency:** CAD
- Amount:** 320.00
- Requester:** Kevin Biles

Below this information is an 'Associated Document' table with columns for Business Unit, DOC ID, Document Type, Status, Document Date, Vendor ID, and Location. The table contains two rows of data:

Business Unit	DOC ID	Document Type	Status	Document Date	Vendor ID	Location
CHANL	000000289	RFO	Approved	03/15/2005		
CHANL	000000289	PO	Approved	03/17/2005	0000001119	DEFAULT

At the bottom of the table are navigation buttons: 'Return to Search', 'Next in List', and 'Previous in List'. The Windows taskbar at the bottom shows the system clock at 11:12 AM.

The above screen is what comes up.

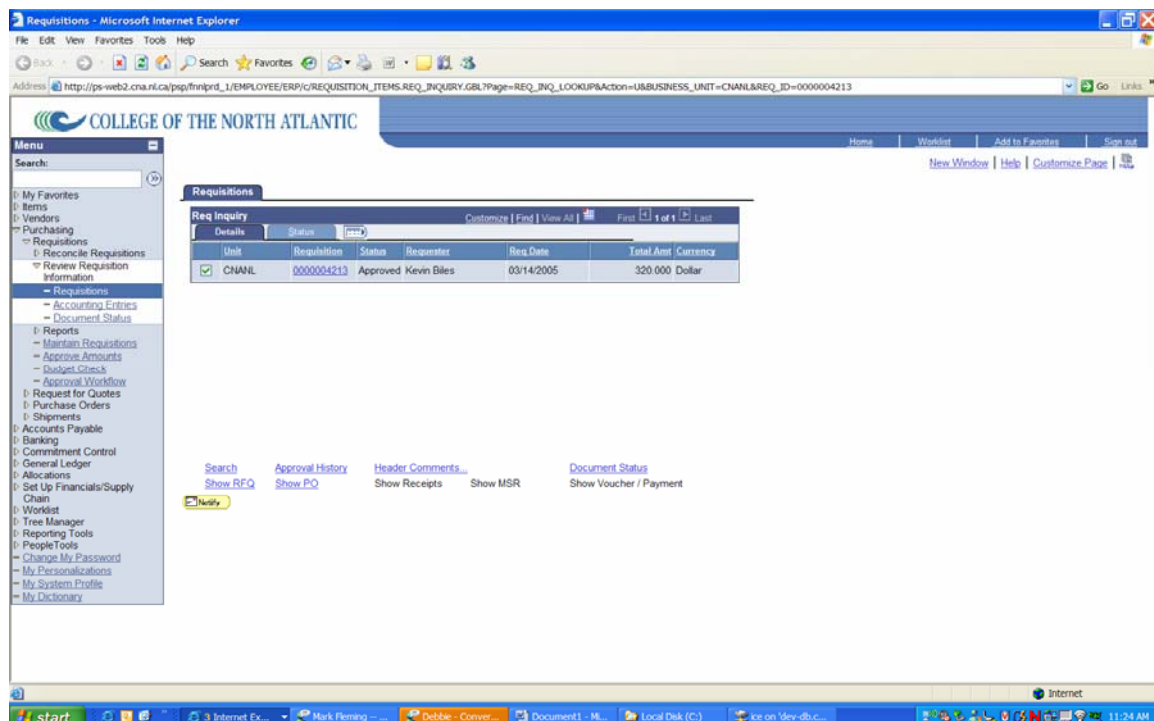
For this particular example, there are some related documents. The available related documents are as follows:

- RFQ – Request for Quote
- PO – Purchase Order
- VOUCHER – Invoice has been entered
- RECEIPT – Receiving has happened
- PAYMENT – Payment has been issued.
- NO DOCUMENTS – is still progressing through the approval process or not yet actioned on by the buyer

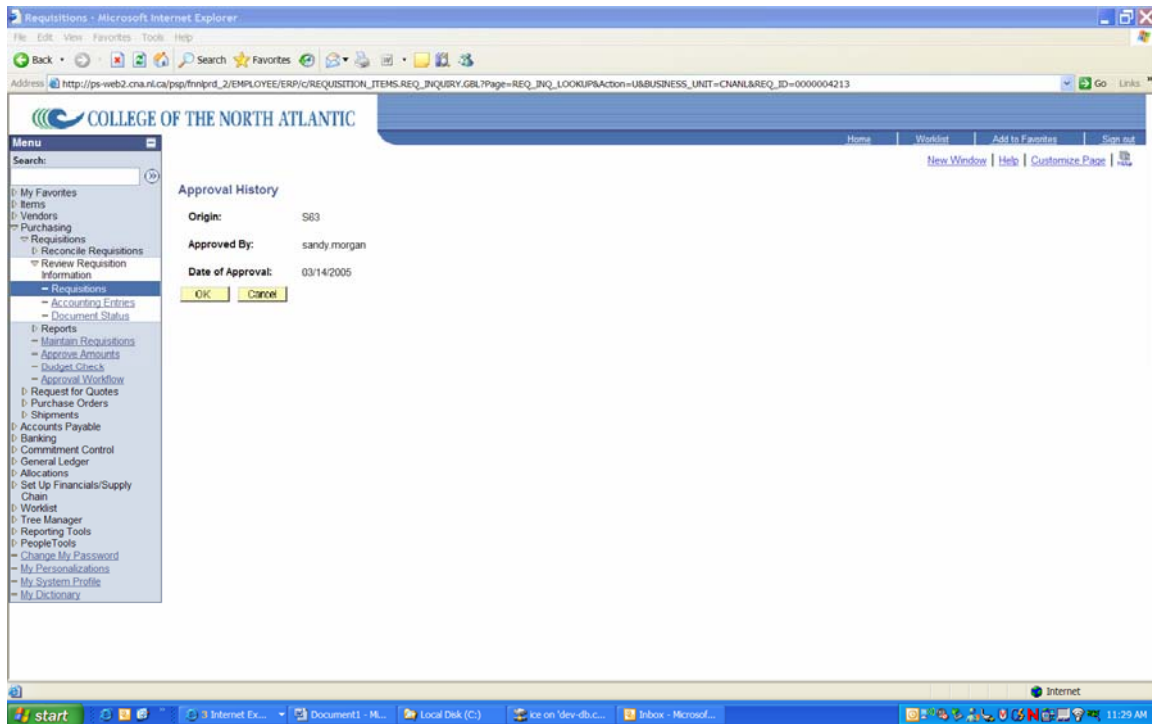
If you are interested in looking at any of these related documents, click on the hyperlink associated with the one of interest.

If you encounter a NO DOCUMENTS, then this is the process to use:

1. Click on the requisition number hyperlink. This will automatically open a new window and display the following screen.



2. Click on the “Approval History” hyperlink at the bottom of the page and you will get the following screen.



The significance of this screen is:

1. If you see no name – this means that you have not done an “approve amounts” which is how the requisition gets to your supervisor. Go back and do.
2. If you see your name – this means that the requisition is with the supervisor associated with the origin that is used on the requisition.
3. If you see your supervisors name (related to origin) - then this means that they have taken action – either approved, recycled, or denied
4. If you see the OBA name – then this means that the requisition has been approved by the supervisor associated with the origin and that action taken by the OBA – either approved, recycled, or denied

If the OBA name is there, then **if a buyer has been selected**, the requisition will become available to the buyer for processing once the requisition has been budget checked.

The budget checking process is scheduled to run every two hours starting at 8:15 am.

If you encounter any difficulties, please email [psfn@cna.nl.ca](mailto:psfn@cna.nl.ca).