



Paramount WorkPlace

– Submitting Requisitions

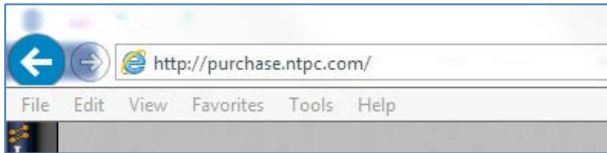
Table of Contents

- Accessing WorkPlace 2
- Submitting Requisitions 3
 - Inventory..... 4
 - Duplicate Line..... 9
 - Non-Inventory 12
 - Duplicate Line..... 16
 - Mass Line Change 17
- Duplicating Requisitions..... 22
- Tracking Your Submitted Requisitions 23
 - Waiting for Approval..... 23
 - Approved..... 24
 - Disapproved 25
 - Canceled..... 26
 - Processed 27
- Viewing Details..... 27
 - Track Approval Routing..... 28
 - Purchasing Status..... 28
- Searching for Requisitions 29
- Rules to Remember..... 31
- Tips for Quick and Easy Requisition Entry..... 31

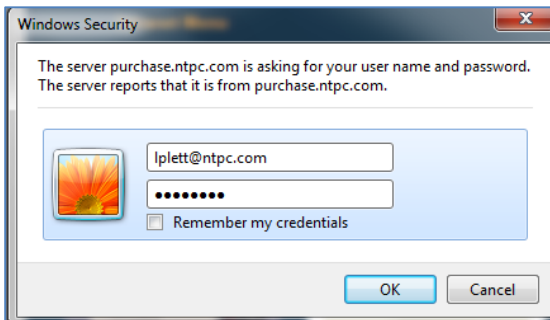
Paramount WorkPlace is an online solution that allows NTPC to automate the procurement process – from requisition entry to approval to processing (PO generation or inventory issue). A user-friendly, web-based tool allows employees to requisition inventory items or items for purchase. Requisitions are routed automatically to the appropriate managers for approval in accordance with the purchasing policy. Once approved, items are issued from inventory or purchased by Logistics.

Accessing WorkPlace

1. Open Internet Explorer.
2. In the address bar type <http://purchase.ntpc.com/>.



3. You will be prompted to enter your windows login username and password. Click OK.



4. At the WorkPlace login page, if the Company is blank select NWT Power Corporation. Then click **Login**.

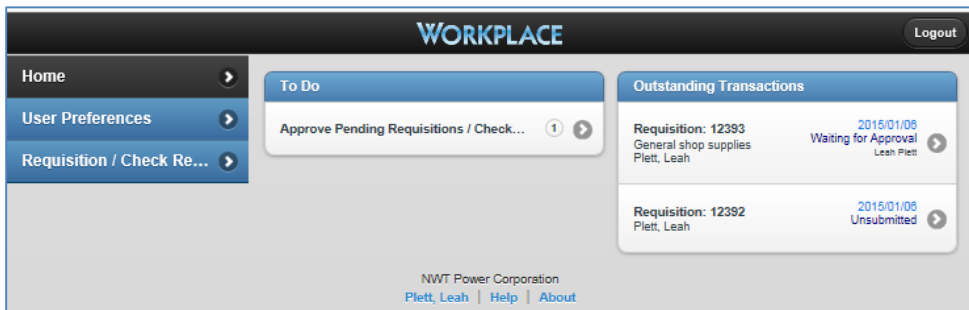


Once logged in you will be directed to the Home page. Any **Outstanding Transactions** will be listed here. This includes any requisitions you have saved or have submitted that have not yet been approved. If you are an approver you will also see requisitions pending approval.

Requisitioner:



Requisitioner and Approver:



Submitting Requisitions

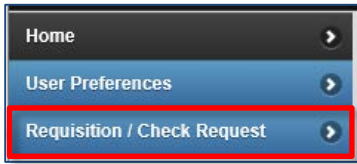
There are 2 types of requisitions you will create: Inventory and Non-Inventory. **You cannot combine inventory items and non-inventory items on one requisition.** Separate requisitions would have to be submitted.

If you are unsure if the item you require exists in Inventory, please take the time to search in the inventory system before submitting it as a non-inventory requisition.

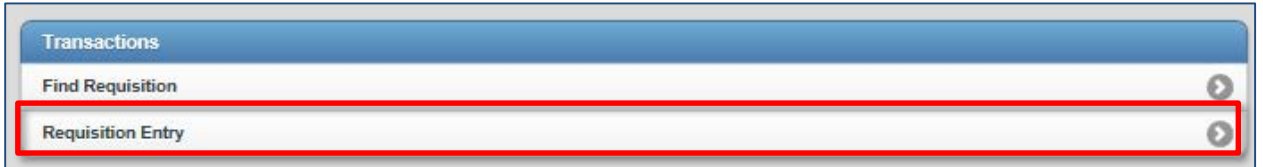
Follow the instructions below for submitting a requisition and use the Item lookup to search the Inventory Item List.

Inventory

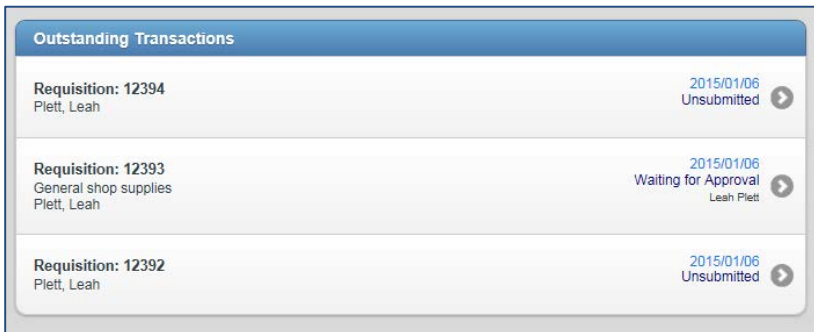
1. From the WorkPlace menu select **Requisition/Check Request**.



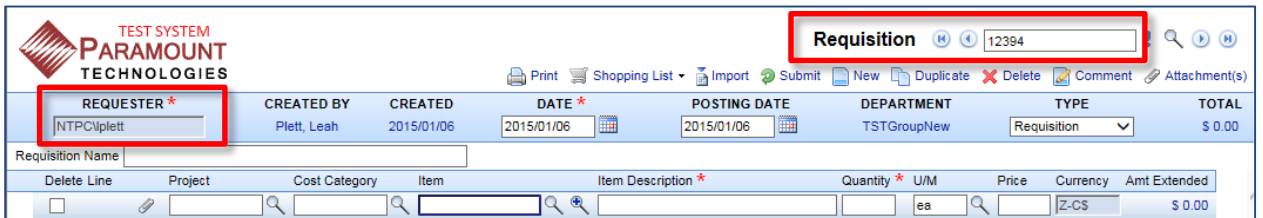
2. From the Transactions menu, select **Requisition Entry**.



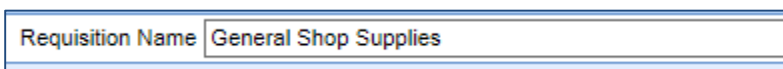
You can also edit existing requisitions by selecting them from **Outstanding Transactions** on the Home page or on the Requisition/Check Request page.



3. Each new requisition is assigned a unique requisition number which you will see in the top right corner. Your name will appear as the requester.



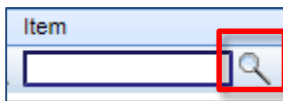
4. Start your requisition by entering a **Requisition Name**. This is a short description of what you are requesting.



5. Start entering in the first line that displays. All items with an * are required fields. **For inventory requisitions, you must select an item number that exists in Inventory.** If you know the number, you can type it in and when you tab off the field the description will populate automatically.

Requisition Name: General Shop Supplies									
Delete Line	Project	Cost Category	Item	Item Description *	Quantity *	U/M	Price	Currency	Amt Extended
<input type="checkbox"/>			1000360	Connector Ampact 602007		ea	22.215	Z-CS	\$ 0.00
<input type="checkbox"/>						ea		Z-CS	\$ 0.00

In most cases, you will not know the item number. To get a list of inventory items, click the lookup beside the Item field.

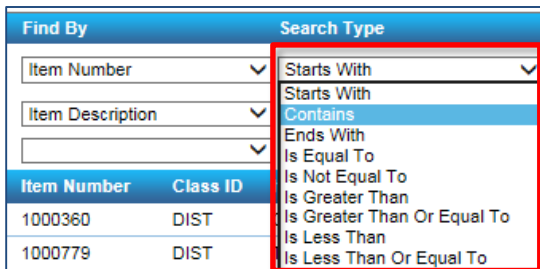


This will open the Item Search window. By default, it gives you the ability to search by Item Number and/or Item Description.

Find By	Search Type	Value	Maximum Records: 100		Export Screen	Export All
Item Number	Starts With		Search			
Item Description	Starts With					
	Starts With					

Item Number	Class ID	Item Description	Default Site ID	Primary Vendor	Primary Vendor Item	U of M	Unit Cost	Picture
1000360	DIST	Connector Ampact 602007				ea	\$ 22.2150	
1000779	DIST	Transformer 75 KVA 7200/120/240				ea	\$ 2,454.6750	
1000781	DIST	Transformer 100 KVA 7200/120/240				ea	\$ 3,658.6000	
1001315	MECH	Valve Gate 3"				ea	\$ 44.6100	
1001332	MECH	Valve Globe 3/8" 200 WOG				ea	\$ 10.3200	
1001535	ENG	Seal 11339 Armstrong				ea	\$ 76.6700	
1001792	ENG	Ring Rubber EMD 8479601				ea	\$ 41.6000	
1001794	ENG	Timing Relax EMD 8253244				ea	\$ 460.3400	

The Search Type by default is set to *Starts With*. You can change this to aid in your search.



For example, you might want to search on gaskets. You would select Item Description *Contains* and then in the value field enter gaskets.

Item Description	Contains	gaskets
------------------	----------	---------

Click the **Search** button. The results of your search will appear in the grid below.

Find By	Search Type	Value	Maximum Records: 100	Export Screen	Export All
Item Number	Starts With		Search →		
Item Description	Contains	gasket			
	Starts With				

Item Number	Class ID	Item Description	Default Site ID	Primary Vendor	Primary Vendor Item	U of M	Unit Cost	Picture
1003518	ENG	Gasket 8209776				ea	\$ 0.5560	
1003519	ENG	Gasket 8026760				ea	\$ 3.4500	
1003520	ENG	Gasket Seal Kits 9087072				ea	\$ 61.9207	
1003522	ENG	Gasket 40010852				ea	\$ 3.2100	
1003672	ENG	Gasket EMD40010838				ea	\$ 0.7292	

You can combine your search criteria to narrow down the search results. For example, you might be searching for gaskets that are < \$10. Add that to your criteria and click **Search**.

Find By	Search Type	Value	Maximum Records: 100	Export Screen	Export All
Item Number	Starts With		Search →		
Item Description	Contains	gasket			
Unit Cost	Is Less Than	10			

Item Number	Class ID	Item Description	Default Site ID	Primary Vendor	Primary Vendor Item	U of M	Unit Cost	Picture
1003518	ENG	Gasket 8209776				ea	\$ 0.5560	
1003519	ENG	Gasket 8026760				ea	\$ 3.4500	
1003522	ENG	Gasket 40010852				ea	\$ 3.2100	
1003672	ENG	Gasket EMD40010838				ea	\$ 0.7292	
1003676	ENG	Gasket EMD40010837				ea	\$ 1.1739	
1003725	ENG	Gasket Q-58403				ea	\$ 4.1377	
1004412	ENG	Gasket 2N3294				ea	\$ 9.5590	
1004413	ENG	Gasket 2N3295				ea	\$ 4.1250	
1004414	ENG	Gasket 2N3583				ea	\$ 5.1966	
1004415	ENG	Gasket 2N3584				ea	\$ 9.1733	

If you requisition inventory items often, you might find it useful to have a list of items in Excel. You can Export the item list by clicking the **Export Screen** or **Export All** options at the top.

Export Screen will export the results based on your search.

Export All will give you a list of all inventory items.

Find By	Search Type	Value	Maximum Records: 100	Export Screen	Export All
Item Number	Starts With		Search →		
Item Description	Contains	gasket			

Click on the item in the list to select it. The Item Description, U/M, and Price will populate from the inventory system.

Delete Line		Project	Cost Category	Item	Item Description *	Quantity *	U/M	Price	Currency	Amt Extended
<input type="checkbox"/>				1004415	Gasket 2N3584		ea	9.1733	Z-CS	\$ 0.00
<input type="checkbox"/>							ea		Z-CS	\$ 0.00

- Enter the **Quantity** and tab into the next field. WorkPlace will calculate the extended cost in the **Amt Extended** field.

Quantity *	U/M	Price	Currency	Amt Extended
10	ea	9.1733	Z-CS	\$ 91.73

- For each line item, you need to enter information in the detail section at the bottom of the screen:

- Priority** – this is a required field. Click the lookup to select or type it in.

ID	Description
A	Priority
B	Normal
C	Annual
R	Repair

- Site ID** – this will default to the main warehouse in your region. After you've selected an item, clicking the lookup for **Site ID** will display all Sites where this inventory item is currently assigned. If the item you are looking for is not assigned to the required site, please contact the **Supplies and Land Inventory Coordinator** for assistance.

Site ID	Description
136	Inuvik

If you leave the site as the default and the item you are requesting is not assigned to it, when you click save or submit on your requisition you will receive an error and the offending line will be highlighted in red.

REQUISITION * ERROR

REQUISITION * NTPC\plett CREATED BY Plett, Leah CREATED 2015/01/06 DATE * 2015/01/06 POSTING DATE 2015/01/06

Requisition Name General Shop Supplies

Delete Line	Project	Cost Category	Item	Item Description *	Quantity *	U/M	Price	Currency	Amt Extended
1			1001792	Ring Rubber EMD 8479601	10	ea	41.6	Z-CS	\$ 416.00
2						ea		Z-CS	\$ 0.00





- c. **Comments** – if you wish to provide the issuer with further instructions, make a comment in the **Internal Comment** window on the Comments tab.

The screenshot shows a software window with four tabs: 'General', 'Comments', 'Ship To Address', and 'Other'. The 'Comments' tab is active. It contains three text input fields: 'Vendor Comment', 'URL Reference', and 'Internal Comment'. The 'Internal Comment' field is highlighted with a red border and contains the text 'stock for Inuvik |'.

If you wish to have the inventory item issued directly to a project, enter the project number and cost category into the Internal Comment box.

The screenshot shows a close-up of the 'Internal Comment' field. It contains the following text: 'Please charge to 141509200001501', 'Cost Category 5301.0007', and 'Thanks'.

If a line has a comment added, a small note icon will appear on the left side of the line.

Delete Line	
<input type="checkbox"/>	1  
<input type="checkbox"/>	3  

- Continue on with your next item. **For each line item you must fill in the fields identified above.**

Duplicate Line

Because this is often duplicate information, it is sometimes easier to complete all of the required information in the first line and then duplicate that line.

Click in one of the fields in the line you wish to duplicate. Then click the **Duplicate Line** button at the bottom of the screen.

Delete Line	Project	Cost Category	Item	Item Description *	Quantity *	U/M	Price	Currency	Amt Extended
<input type="checkbox"/>	1		1001792	Ring Rubber EMD 8479601	10	ea	41.6	Z-CS	\$ 416.00
<input type="checkbox"/>						ea		Z-CS	\$ 0.00

General | Comments | Ship To Address | Other

Department: TSTGroupNew, Site ID: 136, Vendor: Inuvik, Vendor Address ID: 10-350-4000-1402-90, Vendor Item: Hay River, Manufacturer's Item: Accountable Stores

Date Required: 2015/01/06, Ship To: 350, G/L Account: 10-350-4000-1402-90, Priority: B, Shipping Method: Normal, Expense Type: Normal

Date Promised: 2015/01/06, Bill To: Hay River, Drop Ship: , Blanket PO: , Payment Term: , Customer ID: , PO Number:

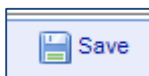
Vendor Contract: , Contract: , Vendor Tax Schedule: , 1099 Box Number:

Buttons: Save, Duplicate Line, Details

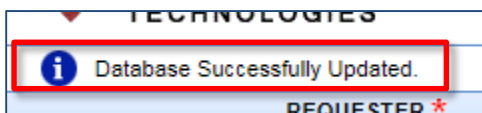
Note that the entire line is duplicated, including comments and any information entered in the details section at the bottom. Click the lookup beside **Item** to select your next inventory item and change the quantity as required.

Delete Line	Project	Cost Category	Item	Item Description *	Quantity *	U/M	Price	Currency	Amt Extended
<input type="checkbox"/>	1		1001792	Ring Rubber EMD 8479601	10	ea	41.6	Z-CS	\$ 416.00
<input type="checkbox"/>			1001792	Ring Rubber EMD 8479601	10	ea	41.6	Z-CS	\$ 416.00

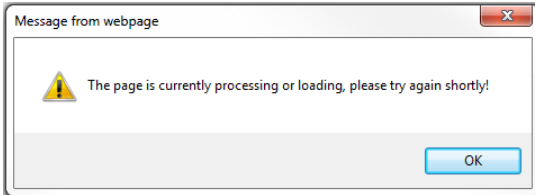
- Once you have completed entering all of your items click the **Save** button at the bottom of the screen.



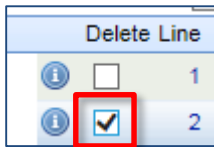
It might not appear like the requisition is saving but please be patient as it takes a few seconds. Once it is finished, you will get a message at the top of the screen to verify it has saved correctly.



If you try to click **Save** again before it is completed, you will get a message. Just click OK to close.



10. If you wish to delete a line item from your requisition, click in the delete checkbox at the far left of the line you wish to delete. Then click the **Save** button.



11. At any point you can save your requisition and return to it at a later date to complete.

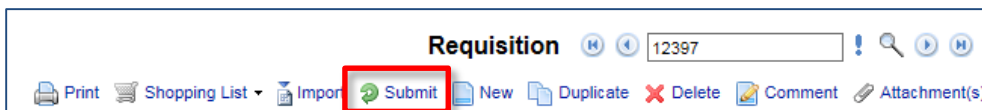
12. If you do not wish to submit or keep the requisition for processing at a later date, click the **Delete** button.



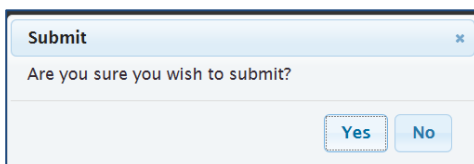
13. You can print the requisition by clicking the **Print** button.



14. Once you are ready to submit for approval and processing, click the **Submit** button.



You will get a dialog box confirming if you wish to submit. Click **Yes** to Submit or **No** to Cancel.



Once the requisition has been submitted, it will indicate success in the top left corner. Note that all of the fields are now read only.

TEST SYSTEM
PARAMOUNT TECHNOLOGIES

Requisition 12392

Print Shopping List Recall New Duplicate Comment Attachment(s)

1 Requisition / Check Request has been Submitted.

REQUESTER	CREATED BY	CREATED	DATE *	POSTING DATE	DEPARTMENT	TYPE	TOTAL
NTPC\plett	Plett, Leah	2015/01/06	2015/01/06	2015/01/06	TSTGroupNew	Requisition	\$ 5,019.40

Requisition Name: General Shop Supplies

Delete Line	Project	Cost Category	Item	Item Description *	Quantity *	U/M	Price	Currency	Amt Extended
1			1001792	Ring Rubber EMD 8479601	10	ea	41.6	Z-CS	\$ 416.00
3			1001794	Timing Relax EMD 8253244	10	ea	460.34	Z-CS	\$ 4,603.40

General Comments Ship To Address Other

Department	Site ID	Vendor	Vendor Address ID	Vendor Item	Manufacturer's Item	
TSTGroupNew	136					
Testing Group	Inuvik					
Date Required	Ship To	G/L Account	Priority *	Shipping Method	Expense Type	
2015/01/06	350	10-350-4000-1402-90	B			
	Hay River	Accountable Stores	Normal			
Date Promised	Bill To	Drop Ship	Blanket PO	Payment Term	Customer ID	PO Number
2015/01/06		<input type="checkbox"/>	<input type="checkbox"/>			
Vendor Contract	Contract	Vendor Tax Schedule	1099 Box Number			

Details Paramount Technologies, Inc.

If you wish to recall a requisition to make changes or to cancel it, click the **Recall** button.

Print Shopping List **Recall** New Duplicate Comment Attachment(s)

You will be prompted for confirmation.

Message from webpage

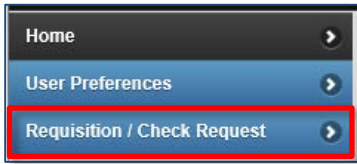
Recall from Approval?

OK Cancel

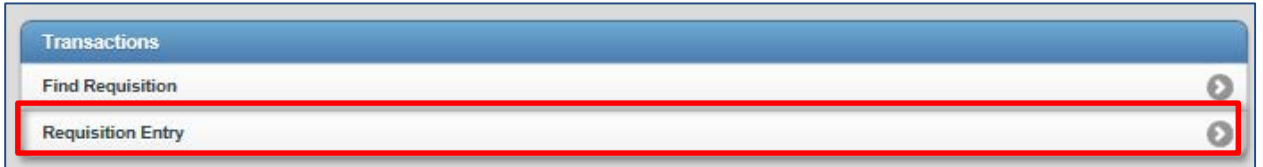
You will now be able to make changes to the requisition and resubmit it or delete it.

Non-Inventory

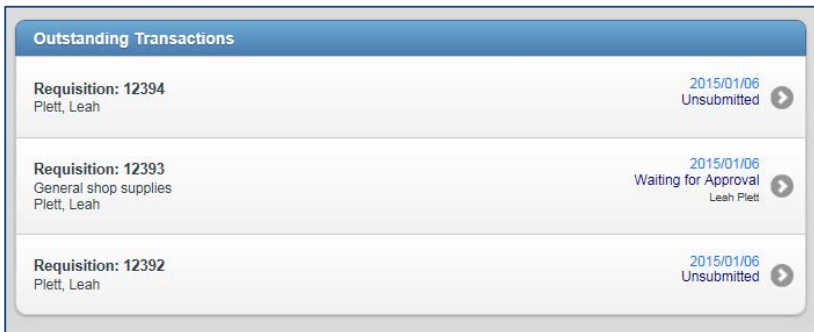
1. From the WorkPlace menu select **Requisition/Check Request**.



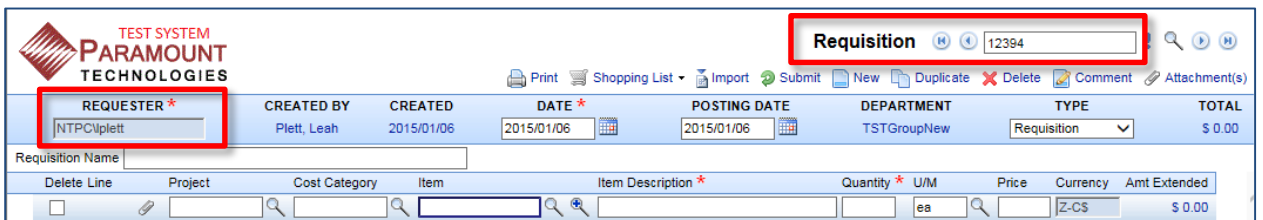
2. From the Transactions menu, select **Requisition Entry**.



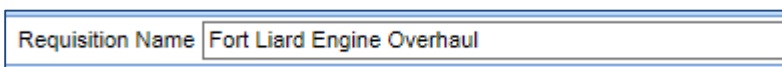
You can also edit existing requisitions by selecting them in **Outstanding Transactions** on the Home page or on the Requisition/Check Request page.



3. Each new requisition is assigned a unique requisition number which you will see in the top right corner. Your name will appear as the requester.

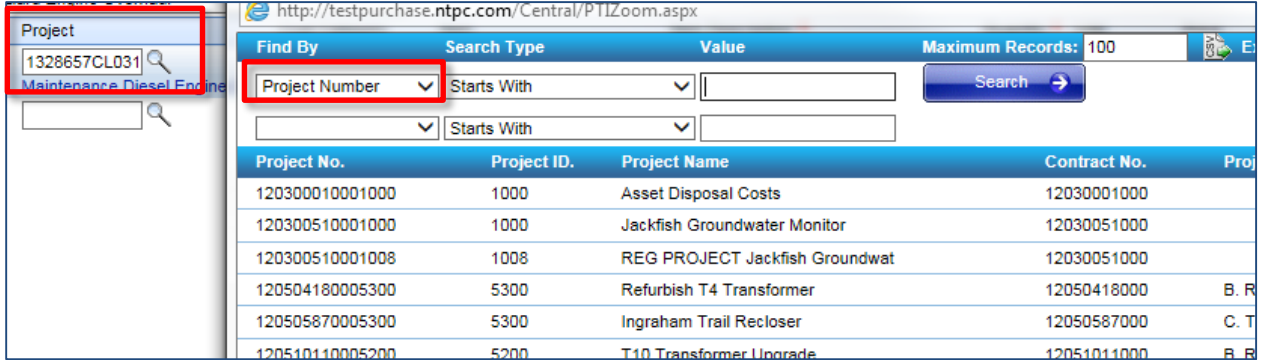


4. Start your requisition by entering a **Requisition Name**. This is a short description of what you are requesting.

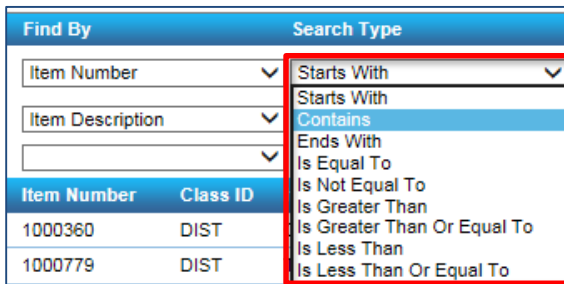


- Start entering in the first line that displays. You must select a **Project Number** when entering a non-inventory requisition.

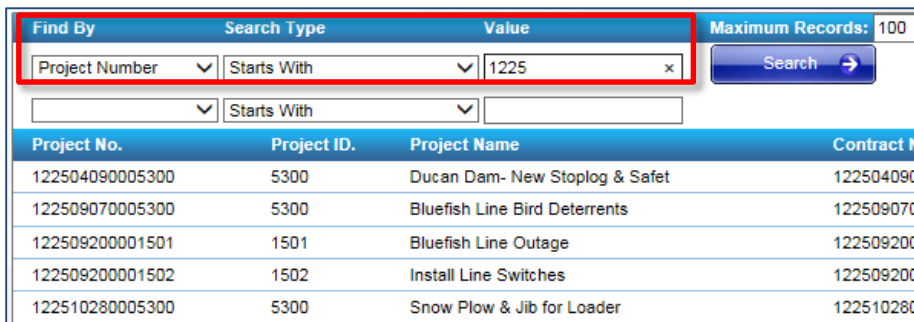
Click the lookup beside project number to open the Project search window. By default it gives you the option to search by Project Number.



The default search type is *Starts With*. You can change this to aid in your search.



For example you might want to search for all capital projects in bluefish. You would select Project Number *Starts With* 1225 and click **Search**. All of the projects meeting your criteria will be displayed in the grid below.



You can combine your search criteria to narrow down the search results. For example, you might be searching for all projects in Inuvik that contain the word LNG in their description. Click **Search**.

Find By	Search Type	Value
Project Number	Starts With	136
Project Name	Contains	LNG

Project No.	Project ID.	Project Name	Contract No.
136509900005300	5300	LNG Storage	13650990000
136511140005300	5300	LNG Make-up Valve	13651114000
136866000001000	1000	LNG Offloading	13686600000
136866100001000	1000	LNG Production Fuel	13686610000
136866200001001	1001	Maintenance of LNG plant -Prev	13686620000
136866200001002	1002	Maintenance of LNG plant -Corr	13686620000

Click on a project to select it.

6. Select a **Cost Category** by clicking the lookup. Only cost categories assigned to the project selected will be listed. If you require a cost category that is not listed please contact the Finance department.

Delete Line	Project	Cost Category	Item	Item Description *	Quantity *	U/M	Price	Currency	Amt Extended
<input type="checkbox"/>	1328657CL031 Maintenance Diesel Engine-CL03 Materials	5301.0000	KWCCE3508-2F	3508 CCE Dual Turbo W/O fltr	1	ea		Z-C\$	\$ 0.00

7. Enter a full description of the item you are requisitioning in the **Item Description**. This is the description that will appear on the purchase order sent to the vendor.

Delete Line	Project	Cost Category	Item	Item Description *	Quantity *	U/M	Price	Currency	Amt Extended
<input type="checkbox"/>	1328657CL031 Maintenance Diesel Engine-CL03 Materials	5301.0000	KWCCE3508-2F	3508 CCE Dual Turbo W/O fltr	1	ea		Z-C\$	\$ 0.00

Because this is a non-inventory requisition, you do not select an inventory item number. If you have a vendor item number you can enter it into the **Item** field.

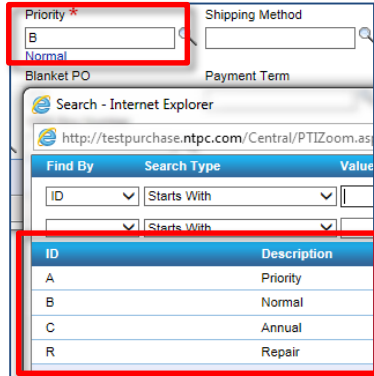
8. Enter a **Quantity**, a **Unit of Measure** and a **Price**. **Price is required.** If you have a quote, enter that price. If you do not have a quote and are unsure of the item price, enter \$1 in the price field.

Requisitions will not route for approval if you do not enter a price.

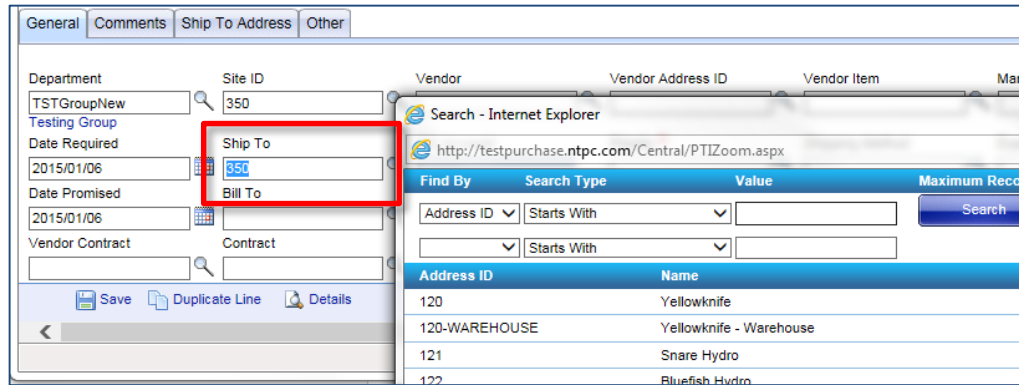
Delete Line	Project	Cost Category	Item	Item Description *	Quantity *	U/M	Price	Currency	Amt Extended
<input type="checkbox"/>	1328657CL031 Maintenance Diesel Engine-CL03 Materials	5301.0000	KWCCE3508-2F	3508 CCE Dual Turbo W/O fltr	1	ea	1.00	Z-C\$	\$ 1.00

9. For each line item, you need to enter some information in the detail section at the bottom of the screen:

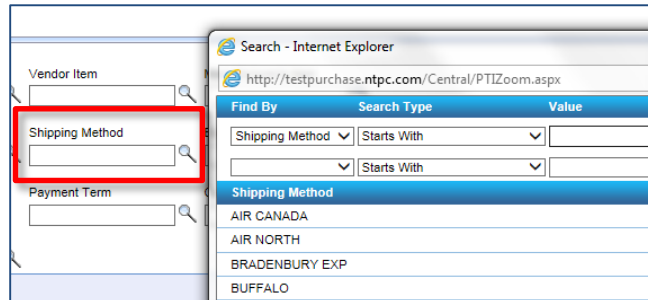
a. **Priority** – this is a required field. Click the lookup to select or type it in.



b. **Ship To** – this will default to the main warehouse in your region. If you require your items to be shipped to a different location click the lookup and select a location.

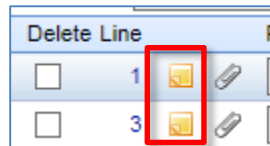


c. **Shipping Method** – this is an optional field. If the items you are requisitioning need to be shipped by a specific method, click the lookup to select it.



- d. **Comments** – there are two types of comments: vendor and internal. Vendor comments will appear on the purchase order. Internal comments are used to provide the buyer further information and to assist him in purchasing your items.

If a line has a comment added, a small note icon will appear on the left side of the line.



- Continue on with your next item. **For each line item you must fill in the fields identified above.**

Duplicate Line

Because this is most often duplicate information, it is sometimes easier to complete all of the required information in the first line and then duplicate that line.

Click in one of the fields in the line you wish to duplicate. Then click the **Duplicate Line** button at the bottom of the screen.

Note that the entire line is duplicated, including comments and any information entered in the details section at the bottom.

Delete Line	Project	Cost Category	Item	Item Description *	Quantity *	U/M	Price	Currency	Amt Extended
<input type="checkbox"/>	1328657CL031 Maintenance Diesel Engine-CLD3	5301.0000 Materials	KWCCE3508-2F	3508 CCE Dual Turbo W/O fltr	1	ea	1.00	Z-C\$	\$ 1.00
<input type="checkbox"/>	1328657CL031 Maintenance Diesel Engine-CLD3	5301.0000 Materials	KWCCE3508-2F x	3508 CCE Dual Turbo W/O fltr	1	ea	1.00	Z-C\$	\$ 1.00

Modify the line with the required information.

Mass Line Change

Another feature that can speed up entry of requisitions is the **Mass Line Change** feature.

The screenshot shows the 'Requisition' form with various fields for requester, date, department, and items. The 'Mass Line Change' button is located at the bottom of the form, below the 'Save' and 'Duplicate Line' buttons.

There are only certain fields that NTPC uses that can be updated using this feature.

The dialog box contains the following fields:

- Date Required
- Vendor Address ID
- Priority**
- Department
- Contact
- Site ID**
- Project**
- Cost Category**
- Vendor Doc. No.
- PO Number
- Ship To**
- Shipping Method**
- Vendor

Buttons at the bottom: Update & Close, Close

For example, perhaps you have entered the incorrect project number on each of your lines. Select the correct project from the lookup on the Mass Line Change window.

The screenshot shows a 'Mass Line Change' window with various fields for data entry. The 'Project' field is highlighted with a red rectangular box and contains the alphanumeric string '1328657CL031002'. Other fields include Date Required, Vendor Address ID, Priority, Department, Contact, Cost Category, Vendor Doc. No., PO Number, Ship To, Shipping Method, and Vendor. At the bottom, there are 'Update & Close' and 'Close' buttons.

Click **Update & Close**.

If a cost category you selected for the previous project is no longer valid for the new project that field will be cleared. Select a new valid cost category as required.

11. If you have a quote for the items or any other documentation you need to pass on to the buyer or vendor, you need to attach it to the first line in your requisition. Click on the paper clip icon on the left of the line.

The screenshot shows a 'Delete Line' window with a list of lines. The first line is selected, and a paper clip icon is highlighted with a red rectangular box, indicating the option to attach a file to that line.

The Attach File window will open.

The screenshot shows the 'Attach File' window. It has a title bar with the Paramount Technologies logo and the text 'Attach File'. Below the title bar, there is a 'New Attachment:' section with a 'File' field containing a 'Browse...' button and a 'Description' field. An 'Attach File' button is located below the description field. A 'Files Currently Attached:' section below shows the message 'There are currently no files attached.' At the bottom, there is a 'Save & Close' button and the text 'Paramount Technologies, Inc.'

Click the **Browse....** button and find the file you wish to attach. Click **Open**. The file will appear in the File box. Enter a good description and click **Attach File**.

This screenshot shows the 'Attach File' window with the 'File' field populated with the path 'C:\Users\LPlett\Desktop\quote.pdf' and the 'Description' field containing 'Quote from supplier'. The 'Attach File' button is visible below the description field.

The file will appear under Files Currently Attached. You can add as many files here as you need. Once you are done, click the **Save & Close** button. If you need to remove the file you've attached, check the **Delete** checkbox before clicking **Save & Close**.


New Attachment:

File Browse...

Description

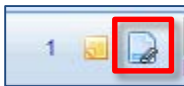
Attach File

Files Currently Attached:

Delete	PO Attach	RFQ	Date	Attachment	File Size	Description
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	2015/01/07	 quote.pdf	56310 Bytes	Quote from supplier

Save & Close Paramount Technologies, Inc.

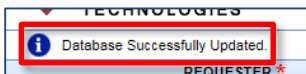
The paperclip icon changes to show that an attachment has been added. Click on this icon to view or modify your attachments.



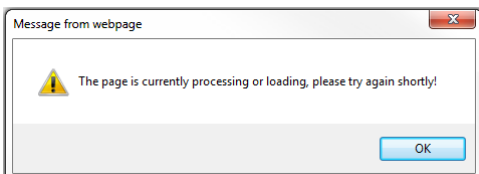
- Once you have completed entering all of your items click the **Save** button at the bottom of the screen.



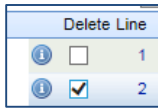
It might not appear like the requisition is saving but please be patient as it takes a few seconds. Once it is finished, you will get a message at the top of the screen to verify it has saved correctly.



If you try to click **Save** again before it is completed, you will get a message. Just click OK to close.



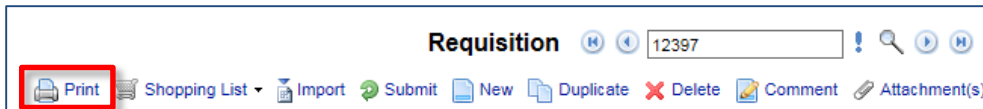
13. If you wish to delete a line item from your requisition, click in the **Delete** checkbox at the far left of the line you wish to delete. Then click the **Save** button.



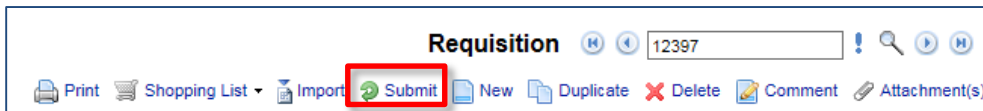
14. At any point you can save your requisition and return to it at a later date to complete.
15. If you do not wish to submit or keep the requisition for processing at a later date, click the **Delete**.



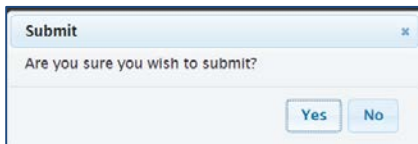
16. You can print the requisition by clicking the **Print** button.



17. Once you are ready to submit for approval and processing, click the **Submit** button.



You will get a dialog box confirming if you wish to submit. Click **Yes** to Submit or **No** to Cancel.



Once the requisition has been submitted, it will indicate success in the top left corner. You will note that all of the fields have now become read only.

If you wish to recall a requisition to make changes or to cancel the requisition, click the **Recall** button.

You will be prompted for confirmation.

You will now be able to make changes to the requisition and resubmit it or delete it.

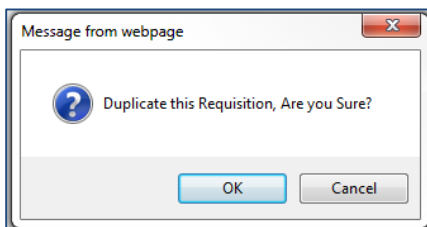
Duplicating Requisitions

If you find you submit similar requisitions on a regular basis, you might find it useful to duplicate requisitions.

1. Open any requisition. It can be a requisition of any status: saved, waiting for approval, approved, already processed.
2. From the top menu click Duplicate.



You will be prompted for confirmation.



This copies all of the lines and the line details into a new requisition. It does not copy over any line attachments.

Follow the previous instructions for submitting a requisition to make the necessary changes required and submit.

Note that if a line detail, like priority, is different on the new requisition from the old requisition you MUST update it on each line.

Tracking Your Submitted Requisitions

Waiting for Approval

Your submitted requisitions will appear under Outstanding Transactions with the status **Waiting for Approval**.

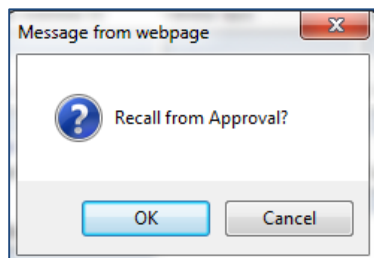
Outstanding Transactions	
Requisition: 12395 Plett, Leah	2015/01/06 Approved
Requisition: 12393 General shop supplies Plett, Leah	2015/01/06 Waiting for Approval Leah Plett
Requisition: 12392 General Shop Supplies Plett, Leah	2015/01/06 Disapproved

An email has been sent to the appropriate approver(s) as determined by your department, the amount of the requisition and NTPC's purchasing policy.

If you wish to recall a requisition to make changes or to cancel the requisition, click the **Recall** button.



You will be prompted for confirmation.



You will now be able to make changes to the requisition and resubmit it or delete it.

Approved

Once your requisition has been approved, it will appear in your Outstanding Transactions with the status **Approved**.

Outstanding Transactions	
Requisition: 12395 Plett, Leah	2015/01/06 Approved
Requisition: 12393 General shop supplies Plett, Leah	2015/01/06 Waiting for Approval Leah Plett
Requisition: 12392 General Shop Supplies Plett, Leah	2015/01/06 Disapproved

You will receive an email confirmation once your requisition has been approved.

Wed 07/01/2015 9:13 AM
WorkPlace <WorkPlace@ntpc.com>
Requisitions / Check Requests have been Approved.

To: Leah Plett

If there are problems with how this message is displayed, click here to view it in a web browser.

NWT Power Corporation
The Following Requisitions / Check Requests have been Approved, click the Link below to view these Requisitions / Check Requests:

Requisitioner: Plett, Leah

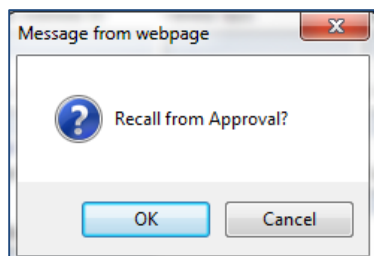
Requisition / Check Request	Priority	Project	Cost Category	Item	Item Description	Vendor Comment	Internal Comments	Approver	Notes	Qty	U/M	Price	Amt Ext	Currency
12395	Normal	1328657CL031001	5301.0000	KWCCE3508-2F	3508 CCE Dual Turbo W/O fltr		Ship to Fort Liard. Request quote from supplier.			1	ea	\$1.0000	\$1.00	Z-C\$
12395	Normal	1328657CL031001	5301.0000	40-1082	CAT 3500 16" Bracket/Plate/HDWE		Ship to Fort Liard. Request quote from supplier.			1	ea	\$1.0000	\$1.00	Z-C\$

If you click on the requisition number link, it will take you to workplace and directly to this requisition.

At this point, you can still recall a requisition to make changes or to cancel it. Click the **Recall** button.



You will be prompted for confirmation.



You will now be able to make changes to the requisition and resubmit it or delete it.

Disapproved

If your requisition has been disapproved, it will appear in your Outstanding Transactions list with the status **Disapproved**.

Outstanding Transactions	
Requisition: 12395 Plett, Leah	2015/01/06 Approved
Requisition: 12393 General shop supplies Plett, Leah	2015/01/06 Waiting for Approval Leah Plett
Requisition: 12392 General Shop Supplies Plett, Leah	2015/01/06 Disapproved

You will receive an email informing you of the disapproval.

Tue 06/01/2015 6:36 PM
WorkPlace <WorkPlace@ntpc.com>

Requisitions / Check Requests have been Disapproved!

To: Leah Plett

If there are problems with how this message is displayed, click here to view it in a web browser.

NWT Power Corporation
The Following Requisitions / Check Requests have been Disapproved!, click the Link below to view these Requisitions / Check Requests:

Requisitioner: Plett, Leah														
Requisition / Check Request	Priority	Project Cost Category	Item	Item Description	Vendor Comment	Internal Comments	Approver Notes	Qty	U/M	Price	Amt Ext	Currency		
12392	Normal		1001794	Timing Relax EMD 8253244	stock for Inuvik		already requisitioned by other user	10	ea	\$460.3400	\$4,603.40	Z-C\$		
12392	Normal		1001792	Ring Rubber EMD 8479601	stock for Inuvik		already requisitioned by other user	10	ea	\$41.6000	\$416.00	Z-C\$		

If you click on the requisition number link, it will take you to workplace and directly to this requisition.

When an approver disapproves a requisition or specific lines in your requisition, they must enter an approver note. The note appears in the email under Approver Notes.

Tue 06/01/2015 6:36 PM
WorkPlace <WorkPlace@ntpc.com>

Requisitions / Check Requests have been Disapproved!

To: Leah Plett

If there are problems with how this message is displayed, click here to view it in a web browser.

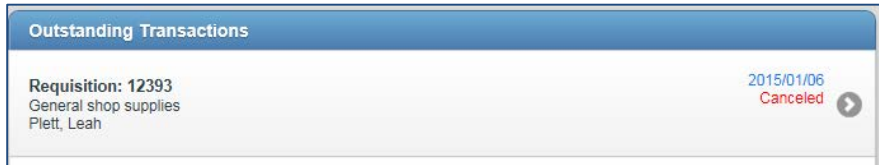
NWT Power Corporation
The Following Requisitions / Check Requests have been Disapproved!, click the Link below to view these Requisitions / Check Requests:

Requisitioner: Plett, Leah														
Requisition / Check Request	Priority	Project Cost Category	Item	Item Description	Vendor Comment	Internal Comments	Approver Notes	Qty	U/M	Price	Amt Ext	Currency		
12392	Normal		1001794	Timing Relax EMD 8253244	stock for Inuvik		already requisitioned by other user	10	ea	\$460.3400	\$4,603.40	Z-C\$		
12392	Normal		1001792	Ring Rubber EMD 8479601	stock for Inuvik		already requisitioned by other user	10	ea	\$41.6000	\$416.00	Z-C\$		

Disapproved requisitions will remain in your **Outstanding Transactions** list until you delete them or make changes and resubmit.

Canceled

If a requisition gets approved but the buyer cancels it for some reason (purchased on VISA for example), the requisition will appear in your Outstanding Transactions with the status Canceled.

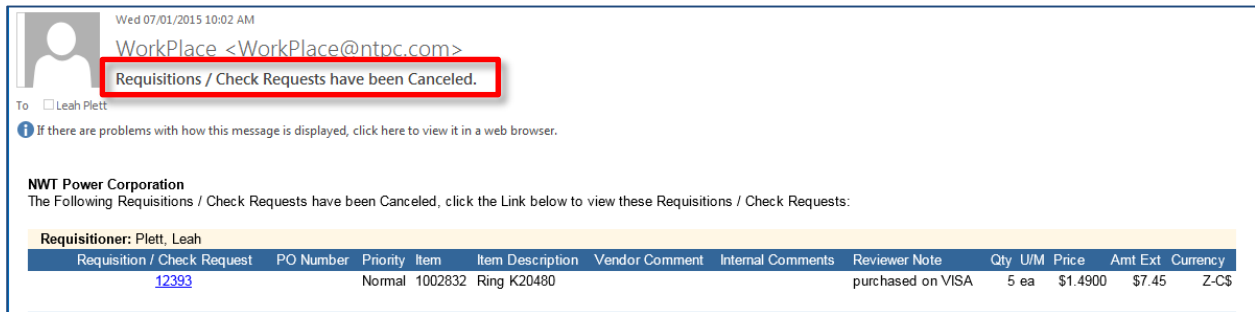


Outstanding Transactions

Requisition: 12393
General shop supplies
Plett, Leah

2015/01/06
Canceled

You will receive an email notifying of the cancellation.



Wed 07/01/2015 10:02 AM
WorkPlace <WorkPlace@ntpc.com>
Requisitions / Check Requests have been Canceled.

To: Leah Plett

If there are problems with how this message is displayed, click here to view it in a web browser.

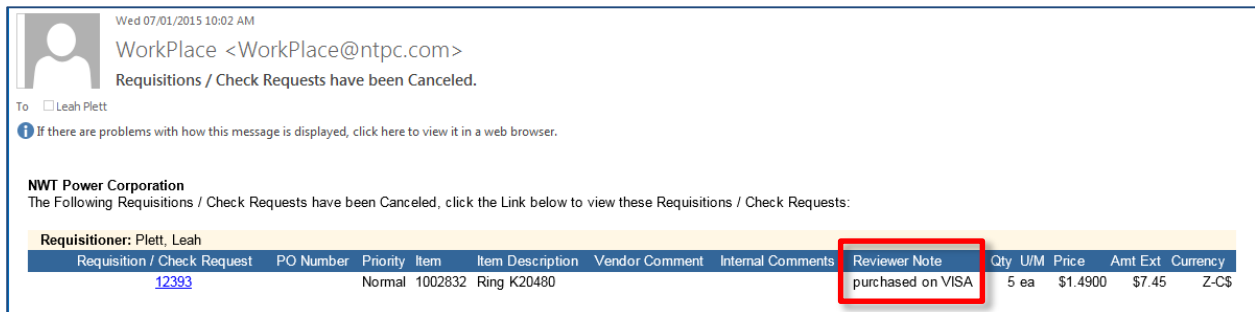
NWT Power Corporation
The Following Requisitions / Check Requests have been Canceled, click the Link below to view these Requisitions / Check Requests:

Requisitioner: Plett, Leah

Requisition / Check Request	PO Number	Priority	Item	Item Description	Vendor Comment	Internal Comments	Reviewer Note	Qty	U/M	Price	Amt Ext	Currency
12393		Normal	1002832	Ring K20480			purchased on VISA	5	ea	\$1.4900	\$7.45	Z-C\$

If you click on the requisition number link, it will take you to workplace and directly to this requisition.

When a buyer cancels a requisition or specific lines in your requisition, they must enter a reviewer note. The note appears in the email under Reviewer Note.



Wed 07/01/2015 10:02 AM
WorkPlace <WorkPlace@ntpc.com>
Requisitions / Check Requests have been Canceled.

To: Leah Plett

If there are problems with how this message is displayed, click here to view it in a web browser.

NWT Power Corporation
The Following Requisitions / Check Requests have been Canceled, click the Link below to view these Requisitions / Check Requests:

Requisitioner: Plett, Leah

Requisition / Check Request	PO Number	Priority	Item	Item Description	Vendor Comment	Internal Comments	Reviewer Note	Qty	U/M	Price	Amt Ext	Currency
12393		Normal	1002832	Ring K20480			purchased on VISA	5	ea	\$1.4900	\$7.45	Z-C\$

Cancelled requisitions will remain in your **Outstanding Transactions** list until you delete them or make changes and resubmit them.

Processed

Once your requisition has been approved and the buyer processes it (a PO generated), the requisition will disappear from your Outstanding Transactions.

You will receive an email notifying you of the completion of your requisition.

Wed 07/01/2015 9:24 AM
WorkPlace <WorkPlace@ntpc.com>
Requisitions / Check Requests have been Processed.

To: Leah Plett
You forwarded this message on 07/01/2015 12:57 PM.
If there are problems with how this message is displayed, click here to view it in a web browser.

NWT Power Corporation
The Following Requisitions / Check Requests have been Processed, click the Link below to view these Requisitions / Check Requests:

Requisitioner: Plett, Leah

Requisition / Check Request	PO Number	Priority	Project	Cost Category	Item	Item Description	Vendor Comment	Internal Comments	Reviewer Note	Qty	U/M	Price	Amt Ext
12395	PO9217	Normal	1328657CL031001	5301.0000	40-1082	CAT 3500 16" Bracket/Plate/HDWE		Ship to Fort Liard. Request quote from supplier.		1	ea	\$1.0000	\$1.00
12395	PO9217	Normal	1328657CL031001	5301.0000	KWCCE3508-2F	3508 CCE Dual Turbo W/O fltr		Ship to Fort Liard. Request quote from supplier.		1	ea	\$1.0000	\$1.00

If you click on the requisition number link, it will take you to workplace and directly to this requisition.

Viewing Details

The details button at the bottom of every submitted requisition provides a great amount of information about your requisition. Select a line from your requisition and click on the Details button. Some of the information will be the same across all lines (PO, approval routing) but some information will be different for each line (quantities shipped/received/invoiced, total costs).

**TEST SYSTEM
PARAMOUNT
TECHNOLOGIES**

REQUESTER * NTPC\plett
CREATED BY Plett, Leah
CREATE 2015/01/06

Requisition Name

Delete	Line	Project	Cost Category	Item
	1	1328657CL031	5301.0000	Maintenance Diesel Engine-CL03 Materials
	3	1328657CL031	5301.0000	Maintenance Diesel Engine-CL03 Materials

General | Comments | Ship To Address | Other

Department: TSTGroupNew, Site ID: 350, Vendor: 10010830, Vendor Ac: PRIMARY
 Testing Group: Hay River, Kingland Ford Mercury Sales
 Date Required: 2015/01/06, Ship To: 120-WAREHOUSE, G/L Account: 10-132-4306-5300-90, Priority: B
 Date Promised: 2015/01/06, Bill To: Yellowknife - Warehouse, Supplies and Services, Normal
 Vendor Contract: Contract, Vendor Tax Schedule: GSTP, 1099 Box

Details

Track Approval Routing

The status of the requisition will appear at the top of the detail window. If it is still waiting to be approved, the approval path will be shown.

In this example, the requisition was to be approved by Boyd, who has set an alternate of Stuart. The Status indicates Stuart has the line loaded into an approval session but has not yet approved it.

Requisition Line Detail
 Requisition: 12511 Line: 1
 Status: Stuart Robinson has this line in Requisition Approval Session #11513

Approval Path
 *Note: Arrow indicates next pending approver, or role.

Approval List	Approver/Role	Assigned Alternate Approvers
MgrMSDehChoSahtu - Manager, Maintenance Services - Deh Cho/Sahtu		
	▶ Mallaley, Boyd	
		Robinson, Stuart

Near the bottom of the detail window is a log of all the transactions in the approval path. All submissions, approvals, recalls, and buyer processing are displayed. When an approver disapproves a requisition they must enter a comment. This will be displayed here. When the buyer cancels a requisition they must enter a comment. This will also be displayed here.

Requisition / Check Request Line Detail
 Requisition / Check Request: 12395 Line: 1
 Status: Requisition / Check Request Processed

Purchasing Status:
 PO Number: PO9217 PDF: View/Print
 Ordered Canceled Shipped Rejected Invoiced Matched
 Quantity: 1.0000 0.0000 0.0000 0.0000 0.0000 0.0000

Log:

Date	User	Action
Jan 7 2015 10:24AM	Plett, Leah	CHANGED: edfBillTo: -> 350, Ply
Jan 7 2015 10:24AM	Plett, Leah	PROCESSED From Review
Jan 7 2015 10:13AM	Plett, Leah	APPROVED
Jan 7 2015 10:04AM	Plett, Leah	SUBMITTED
Jan 7 2015 9:32AM	Plett, Leah	RECALLED
Jan 6 2015 10:37PM	Plett, Leah	APPROVED
Jan 6 2015 10:35PM	Plett, Leah	SUBMITTED

Purchasing Status

The next section on the window displays the purchasing status. If a PO was generated from the requisition, a link to a copy of the PO is included. Click on the link to open the PO. This is the Workplace version of the PO and not the final version that is sent to the vendor from Logistics.

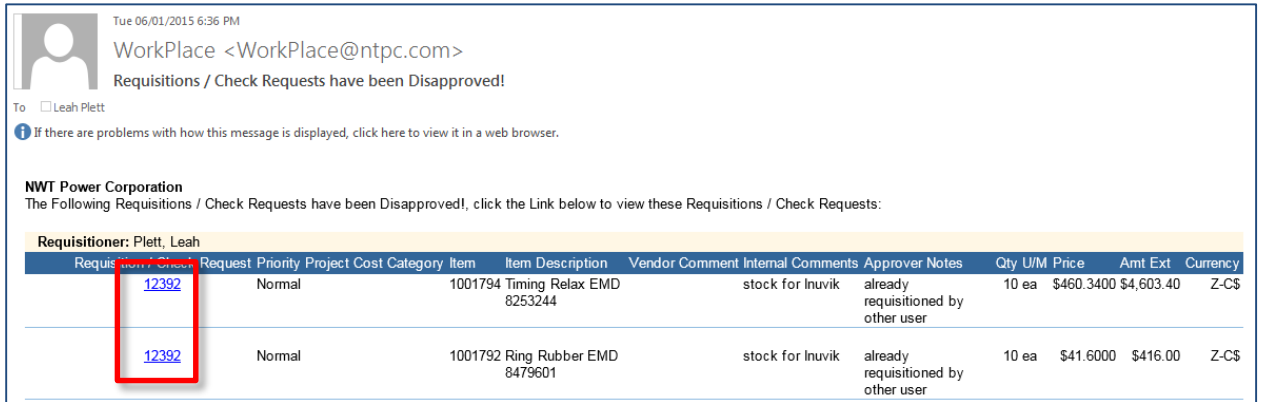
Purchasing Status:
 PO Number: PO9308 PDF: View/Print
 Ordered Canceled Shipped Rejected Invoiced Matched
 Quantity: 2.0000 0.0000 2.0000 0.0000 2.0000 2.0000

Quantities for this specific line item in your requisition will appear here for amounts ordered, shipped, invoiced and matched.

Searching for Requisitions

Once a requisition has been processed by the buyer, it will no longer appear in your Outstanding Transactions list. If you want to look at that requisition or view its details after it has been processed, you can do one of 2 things:

1. Click on the link from the email you received notifying you of approval or review.



Tue 06/01/2015 6:36 PM
WorkPlace <WorkPlace@ntpc.com>
Requisitions / Check Requests have been Disapproved!

To: Leah Plett

If there are problems with how this message is displayed, click here to view it in a web browser.

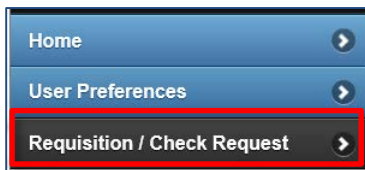
NWT Power Corporation
The Following Requisitions / Check Requests have been Disapproved!, click the Link below to view these Requisitions / Check Requests:

Requisitioner: Plett, Leah

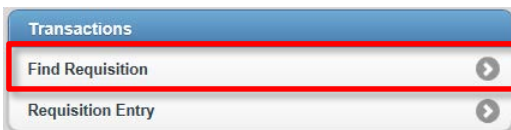
Requisition / Check Request	Request Priority	Project Cost Category	Item	Item Description	Vendor Comment	Internal Comments	Approver Notes	Qty	U/M	Price	Amt Ext	Currency
12392	Normal		1001794	Timing Relax EMD 8253244	stock for Inuvik		already requisitioned by other user	10	ea	\$460.3400	\$4,603.40	Z-C\$
12392	Normal		1001792	Ring Rubber EMD 8479601	stock for Inuvik		already requisitioned by other user	10	ea	\$41.6000	\$416.00	Z-C\$

2. Search for the requisition within WorkPlace.

From the WorkPlace menu select Requisition/Check Request.



Select **Find Requisitions** from the Transactions section.



As with the other search windows, you are able to search on many of the fields using many different search types. After you've entered your criteria click the **Search** button.

Transaction Number	Type	Requisition Name	Requisitioner								
12398	Requisition		Plett Leah								
No											
12397	Requisition	General Shop Supplies	Plett Leah								
Line Inv#	TRX#	Project	Cost Category	G/L Account G/L Description	Reference URL	Released	Department	Status No. Status Description	Customer ID Customer Name	Item No. Manufacturer's Item Item Description	Vendor ID Vendor Description Vendor Check Name
1	1328657	CL031001	5301.0000	10-132-4306- 5300-90 Supplies and Services		No	TSTGroupNew	100 in Requisition / Check Request Detail		3508 CCE Dual Turbo W/O Fltr	

Click on a requisition to open it.

Rules to Remember

The following rules are important to remember when entering requisitions. Not following these rules may result in a disapproved or canceled requisition which may delay the purchase or issue of your items.

- For an inventory requisition, you **MUST** select a valid inventory number in the item field.
- For a non-inventory requisition, you **MUST** select a project number and cost category on each line in your requisition.
- For an inventory requisition, you will **NOT** enter a project number or cost category in each line. If you wish to issue the item directly to a project, enter the project and cost category in the internal comment.
- Priority is required on each line.
- You cannot combine inventory and non-inventory items in the same requisition.
- If you are unsure if the item you are requisitioning exists in Inventory, please take the time to search the inventory list before submitting a non-inventory requisition.

Tips for Quick and Easy Requisition Entry

Follow these tips for quick and easy requisition entry.

- Use the **Duplicate Line** and **Mass Line Change** features to speed up entering the information required on each line of your requisition.
- If you have similar requisitions you enter regularly, use the **Duplicate** or **Shopping List** features to speed up the process.
- Clean out your Outstanding Transactions. If a requisition has been Canceled or Disapproved, modify it and resubmit it or delete it.
- Use the internal and vendor comment fields to provide information to the buyer and vendor.
- Use the details to track your submitted requisition: where it is in the approval routing, view the PO created, track comments by approvers and the buyer and view receiving and invoicing on the released PO.