

Purpose

Use this procedure to create a purchase requisition for goods, including entering:

- A line item
- Account assignment coding
- A valuation price for the line item
- A project title for the purchase requisition, in English and French

Trigger

Perform this procedure when you are required to create a purchase requisition for goods.

Prerequisites

- You must know the applicable cost center, fund, functional area, general ledger account number and consignee code (required for delivery address)

Portal

- Use the following link to access the myEMS (SAP) Portal:
<https://sapk5pci.service.gc.ca/irj/portal>.

Transaction Code

N/A

Helpful Hints

- A purchase requisition is an internal document that defines a need for goods or services.

Procedure

1. Start by accessing the myEMS (SAP) Portal.

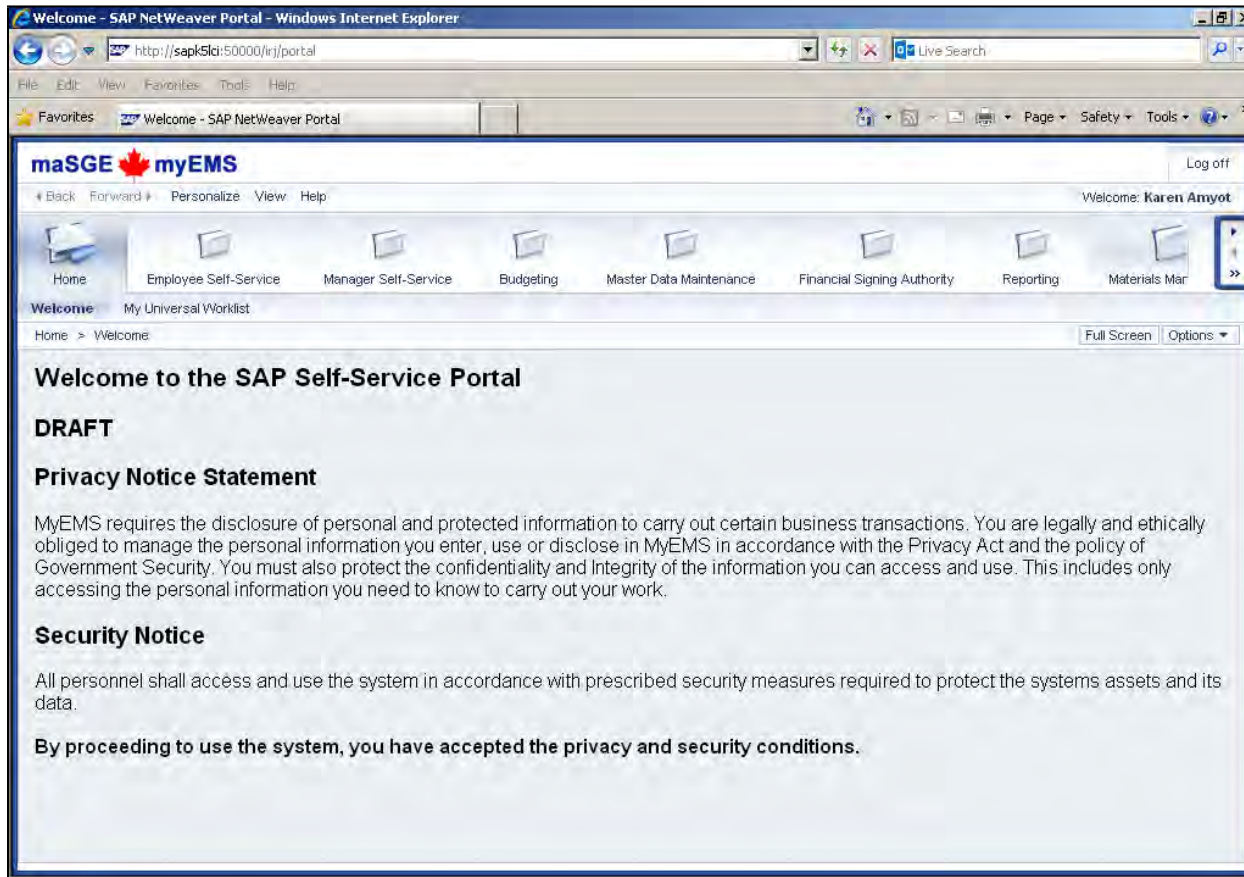


The data shown in this procedure is for example purposes only. When you perform this transaction, please enter the applicable data for your requirements.




First we will navigate to the create purchase requisition screen.

Welcome



Welcome - SAP NetWeaver Portal - Windows Internet Explorer

http://sapk5ldg:50000/inf/portal

maSGE  myEMS

Welcome: Karen Amyot

Home Employee Self-Service Manager Self-Service Budgeting Master Data Maintenance Financial Signing Authority Reporting Materials Mar

Welcome My Universal Worklist

Welcome to the SAP Self-Service Portal

DRAFT

Privacy Notice Statement

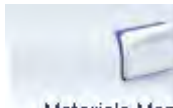
MyEMS requires the disclosure of personal and protected information to carry out certain business transactions. You are legally and ethically obliged to manage the personal information you enter, use or disclose in MyEMS in accordance with the Privacy Act and the policy of Government Security. You must also protect the confidentiality and Integrity of the information you can access and use. This includes only accessing the personal information you need to know to carry out your work.

Security Notice

All personnel shall access and use the system in accordance with prescribed security measures required to protect the systems assets and its data.

By proceeding to use the system, you have accepted the privacy and security conditions.

2.



Click

Materials Mar

Welcome

Welcome - SAP NetWeaver Portal - Windows Internet Explorer

http://sapSId:50000/rj/portal

maSGE myEMS

Log off

Welcome: Karen Amyot

Employee Self-Service Manager Self-Service Budgeting Master Data Maintenance Financial Signing Authority Reporting Materials Management

Welcome Requisitioner PM Master Data Specialist AA Master Data Specialist Receiver

Materials Management > Welcome > Welcome

Full Screen Options

Materials Management

AA Master Data Specialist

For if you perform general accounting entries, process partner journal vouchers, and perform GL Financial and Master Data reporting.

PM Master Data Specialist

If you duties include setting the foundation for the management of physical assets in SAP, and/or enable HRSDC to perform all physical asset management processes and ensures compliance with policy requirements.

Receiver

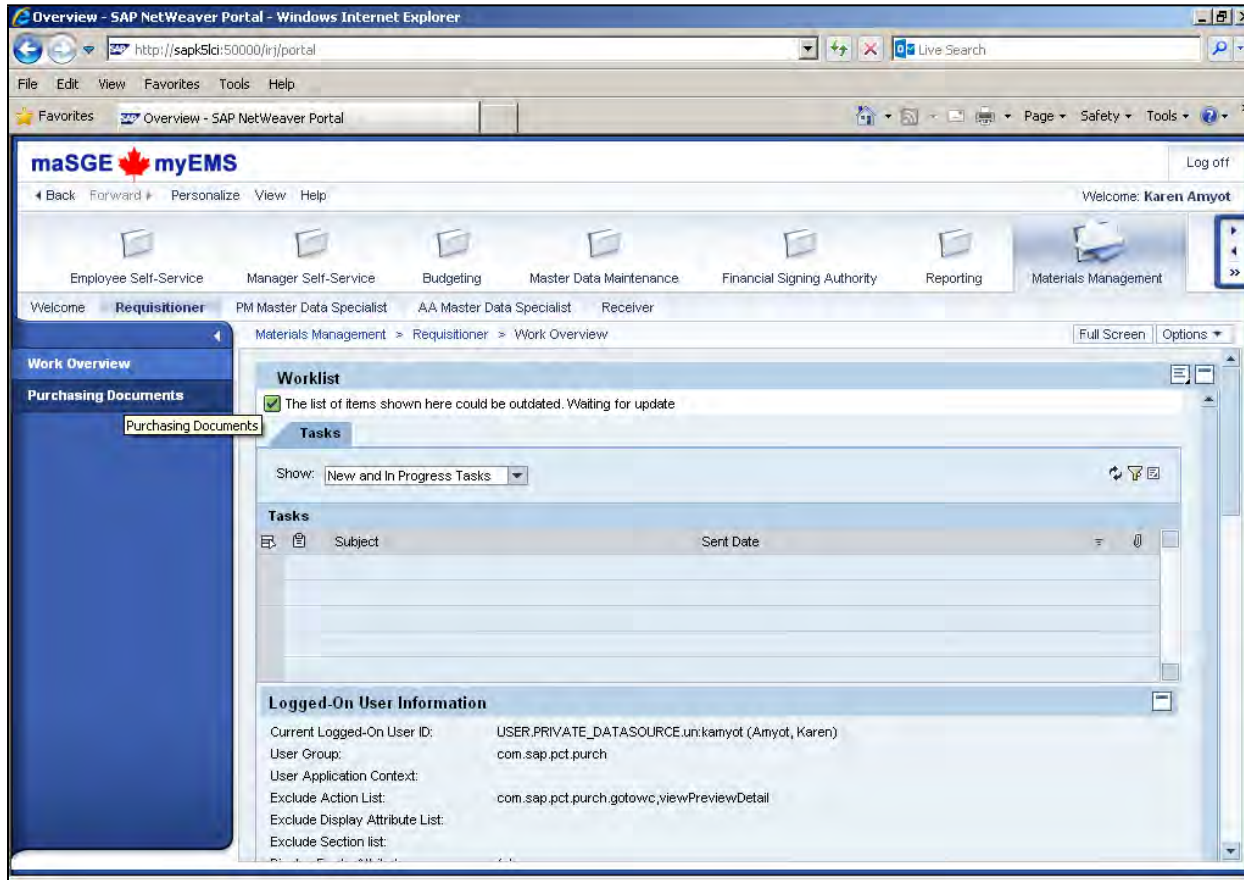
For if you receive any delivered asset and have to sign for it.

Requisitioner

For if you perform Section 33 payment authority, issue payments (PWGSC-SPS), and process Payment Cancellations.

3. Click **Requisitioner**

Overview



4. Click **Purchasing Documents**

Purchasing Documents

- Click [Create Purchase Requisition](#).



The *Create Purchase Requisition* screen is displayed in a new browser window.

- The screen has three areas: **Header**, **Item Overview** and **Item Detail**.
- Click to expand an area.
- Click to collapse an area.

Create Purchase Requisition

6. Click  beside the unlabelled field above  Header.

7. Select **Purchase Requisition**.



Now we will enter a line item, in the **Item Overview** area.





If the goods are not consumables and they must be tracked (i.e., bar coded with a departmental bar code) you must enter the MMR number in the **Material** field.

To search for a MMR used the dropdown list in the **Material** field.

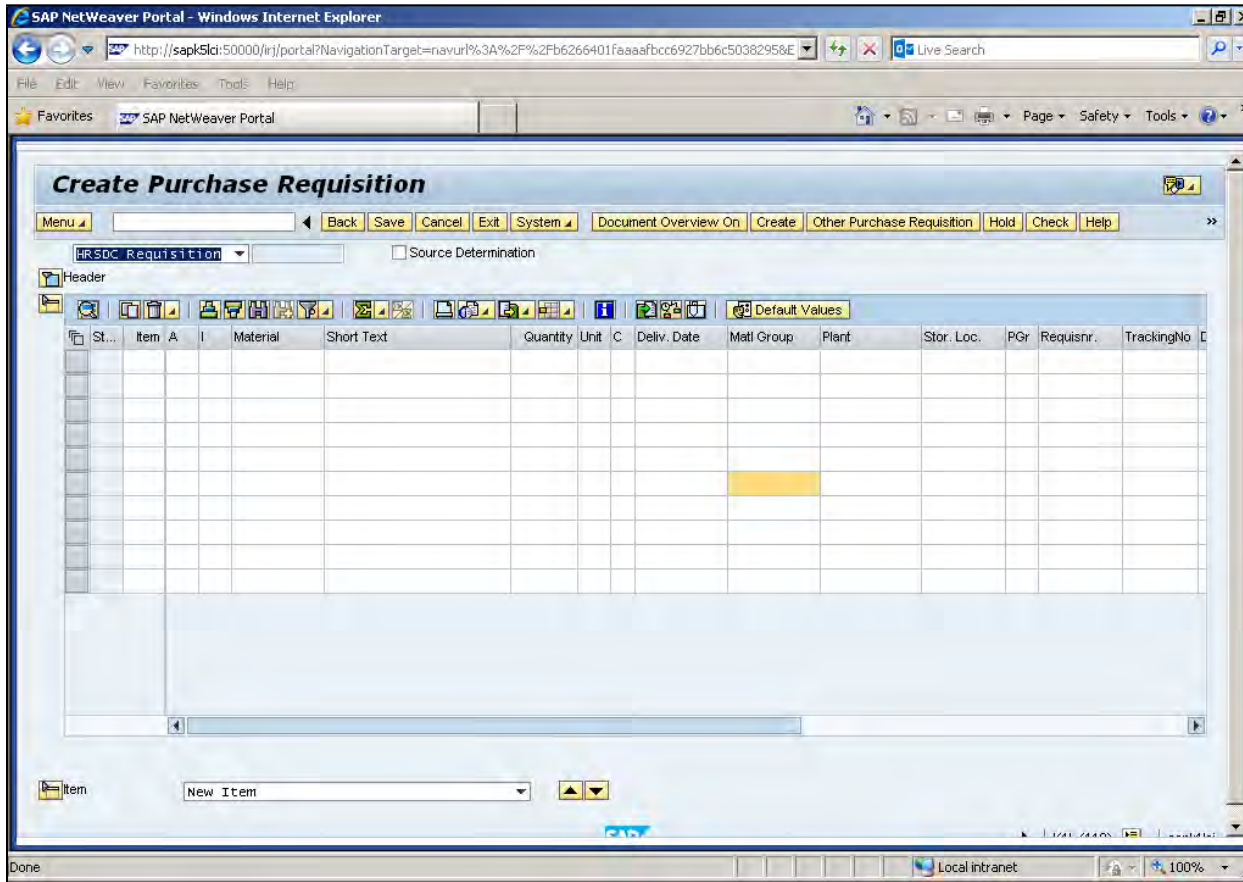


If you want to save time by copying an existing purchase requisition that has similar items

1. Click the **Document Overview On** button to open the document overview pane (if it isn't already open).
2. Click .
3. Select **My purchase requisitions** from the menu.
4. In the **Document Overview** pane, click on the item of the purchase requisition that you want to copy.
5. Click .

The fields are now populated with the data from this purchase requisition.

Create Purchase Requisition




8. As required, complete/review the following fields:

Field	R/O/C	Description
A	R	Account Assignment Category - Specifies whether accounting for an item is to be effected by an auxiliary account (such as, a cost center). Example: K
Short Text	R	Short description for procurement of goods or services, 40 characters in length. Example: Filing cabinet
Quantity	R	The quantity being ordered, received or transferred. Example: 10

Field	R/O/C	Description
Unit	R	This is typically a unit of measure for quantities and currency code for values. Example: EA
Deliv. Date	R	The proposed date by which the customer should receive the goods or services. Example: 11.03.2014



- Enter the date on which you want the goods delivered. (The funds are committed, in the budget, for the delivery date that you enter in this field.)
- If you are requisitioning several units of an item AND you do not want all the units delivered in the same fiscal year, you must enter a separate line item for each applicable fiscal year.

9. Click  beside the **Matl Group** field.

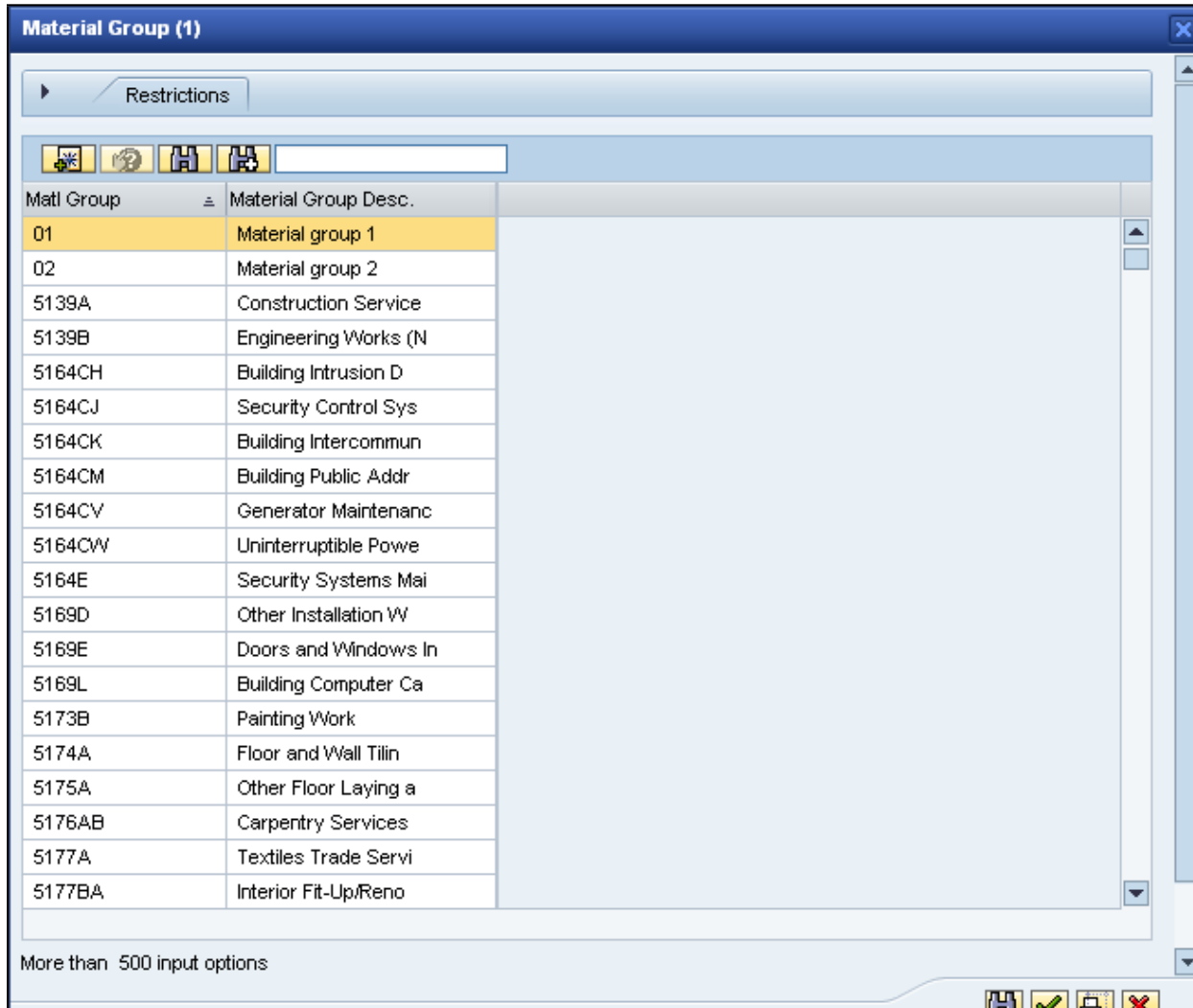


The **material group** number is the same as the **(GSIN) Goods and Service Identification Number**.



Enter a search term, for example, *cabinet* in the unlabelled search field.

Material Group (1)



10. As required, complete/review the following fields:


Field	R/O/C	Description
Search field	R	<p>Meaningful word that uniquely describes the master data record. The system uses terms from the search field to locate the master data record during a search function.</p> <p>Example: CABINETS</p>

11. Click .

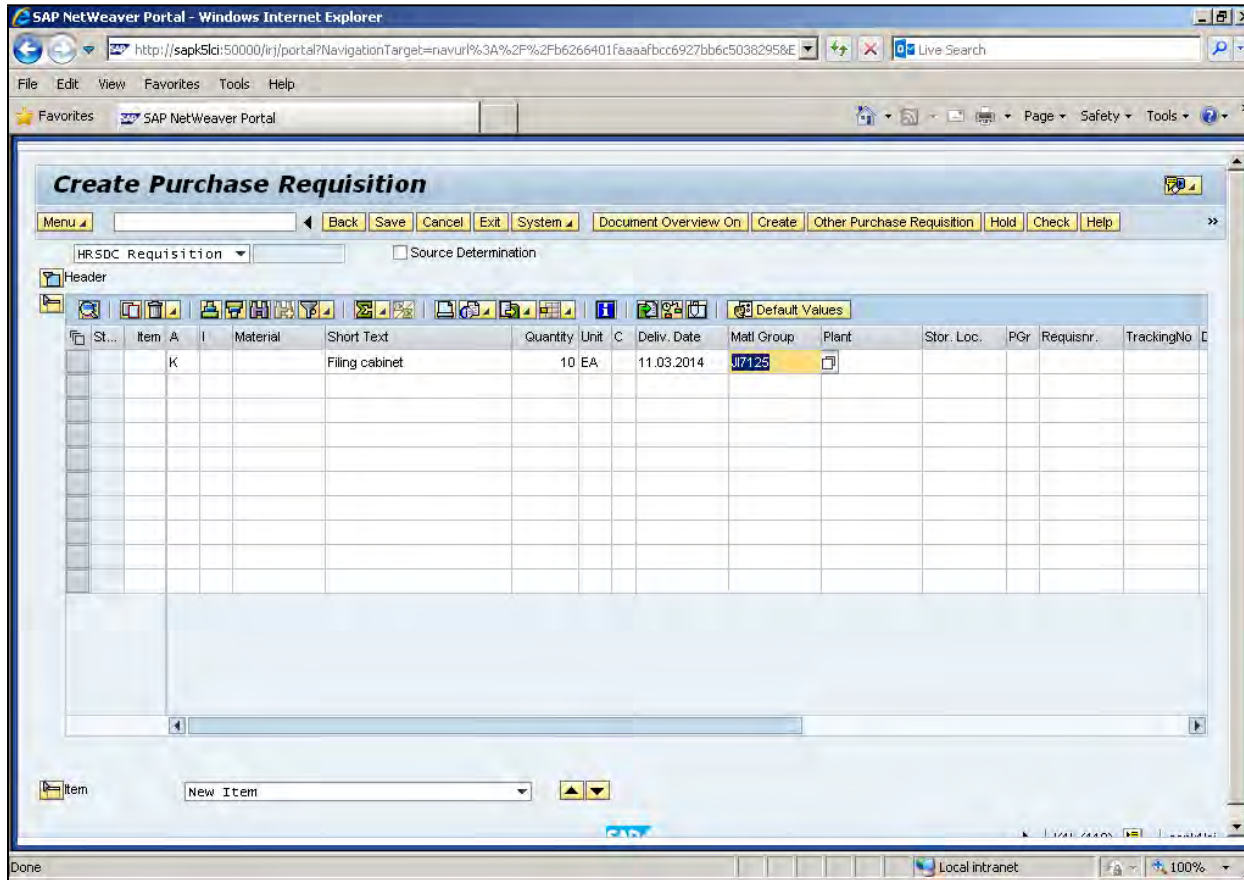
Material Group (1)

Matl Group	Material Group Desc.
J17125	Cabinets, Lockers, B
J17220	Floor Coverings - In
J17230	Draperies, Awnings a
J19905	Signs and Identifica
JX2310	Passenger Motor Vehi
JX3610AA	Photocopying Machine
JX3920	Materials Handling E
JX4110B	Dispensers, Drinking
JX4120	Air Conditioning Equ
JX4120A	Air Conditioning Equ
JX4130A	Heat, Ventilation &
JX5110	Hand Tools, Edged, N
JX5120	Hand Tools, Nonedged
JX5130	Hand Tools, Power-Dr
JX5133	Drill Bits, Counterb
JX5640A	Insulation, Board, T
JX5680	Construction Materia
JX5805	Telephones and Teleg
JX5810	Communications Secur
JX5811	Other Cryptologic Eq

Entry found

12. Click .

Create Purchase Requisition



13. As required, complete/review the following fields:

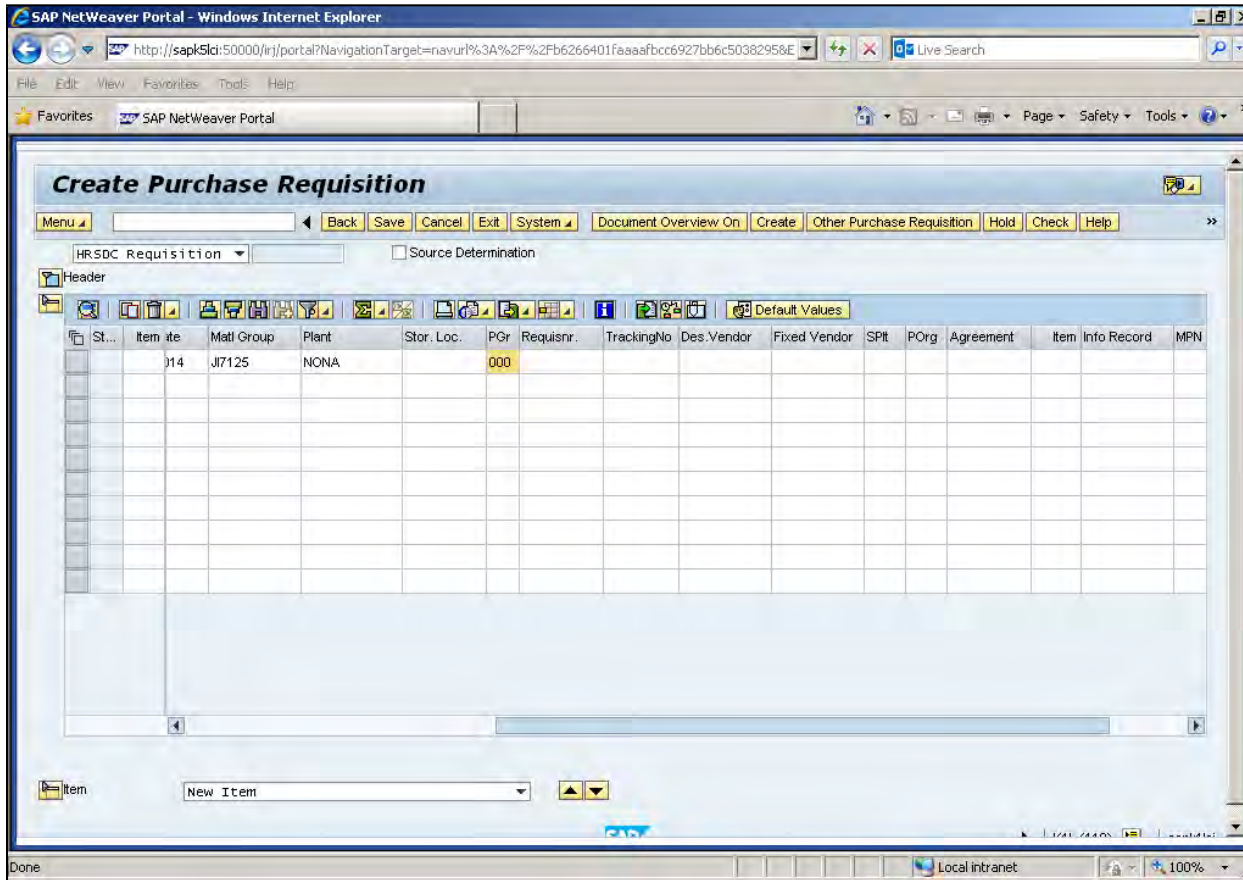
Field	R/O/C	Description
Plant	R	A high-level organizational unit used to subdivide a department for the purpose of reporting on and controlling various procurement and material management functions from a logistics perspective. Example: NONA
PGr	R	An organizational unit used to allow departments to identify the person or group responsible for the applicable purchasing activity. Example: 000



We will scroll right to view more fields.

14. Click  to scroll right.

Create Purchase Requisition



15. As required, complete/review the following fields:

Field	R/O/C	Description
POrg	R	An organizational unit used by departments to identify the organization responsible for the negotiation and creation of purchasing documents. Example: 014A

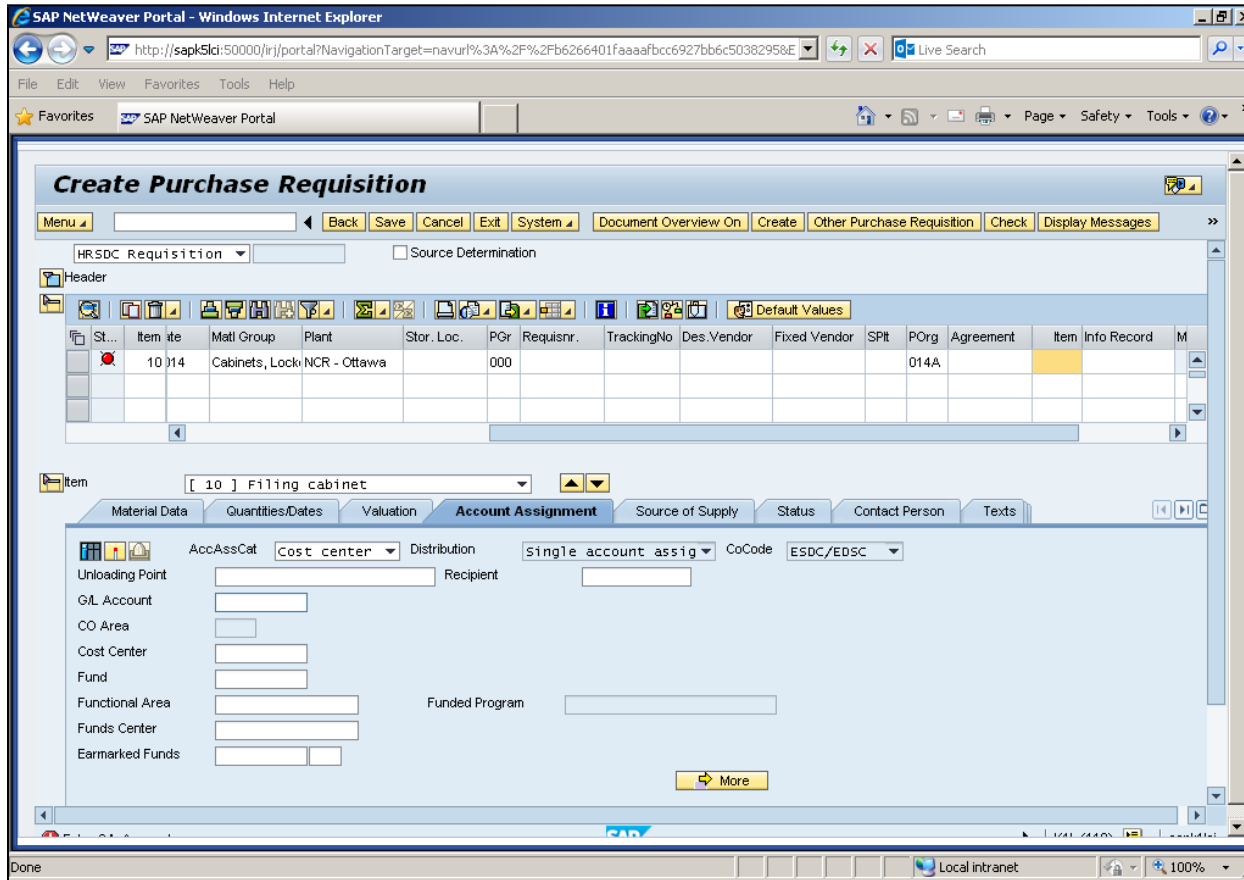
16. Press "Return".



The **AccountAssignment** tab is automatically displayed in the foreground, in the **Item Detail** area.

- We will enter the account assignment data for this line item.

Create Purchase Requisition



17. As required, complete/review the following fields:

Field	R/O/C	Description
G/L Account	R	The detailed financial code used by departments to identify the nature of a transaction from a General Ledger perspective (for example, Supplies, Inventory). Example: 533001
Cost Center	R	The detailed financial code used by departments to identify the responsibility center accountable for the transaction from a cost management perspective. Example: 200030
Fund	R	The detailed financial code used to identify the departmental source of funding applicable to a transaction from a funds management perspective. Example: B001

Field	R/O/C	Description
Functional Area	R	An input code that uniquely identifies the activity element of a specific program in the Program Activity Architecture (PAA). Program activities are the major subdivisions of a program. Most departments and agencies disaggregate programs below the activity level to the activity element level. Example: 0140-1001

18. Press "Return".



The **Valuation** tab is automatically displayed in the foreground, in the **Item Detail** area.

- We will enter the valuation price for this line item.

Create Purchase Requisition

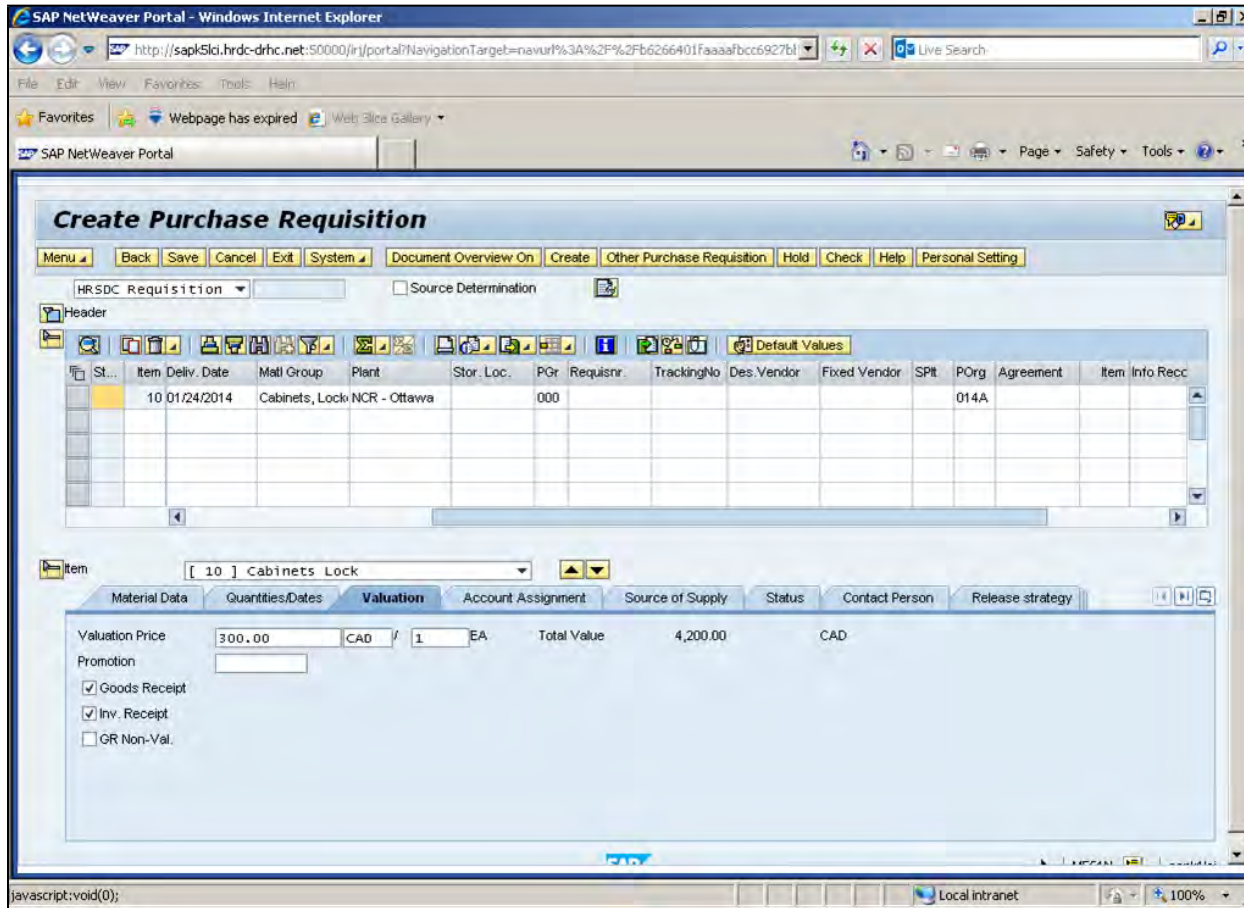
The screenshot shows the SAP NetWeaver Portal interface for creating a purchase requisition. The main window is titled "Create Purchase Requisition". At the top, there are navigation buttons: Back, Save, Cancel, Exit, System, Document Overview On, Create, Other Purchase Requisition, Check, and Display Messages. Below this is a header section with "HRSDC Requisition" and "Source Determination" options. A table lists requisition items, with the first item selected: Item 10, Material Group "Cabinets, Lock", Plant "NCR - Ottawa", and PGR "000". The "Item" field is set to "[10] Filing cabinet". The "Valuation" tab is active, displaying the following fields: Valuation Price (input field), Currency (CAD), Unit (1 EA), Total Value (0.00 CAD), and Promotion (input field). There are also checkboxes for "Goods Receipt" (checked), "Inv. Receipt" (checked), and "GR Non-Val." (unchecked).


19. As required, complete/review the following fields:

Field	R/O/C	Description
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Field	R/O/C	Description
Valuation Price	R	The price of a material per base unit of measure. The valuation price is the basis for determining the value of goods for balance sheet purposes. Example: 300.00

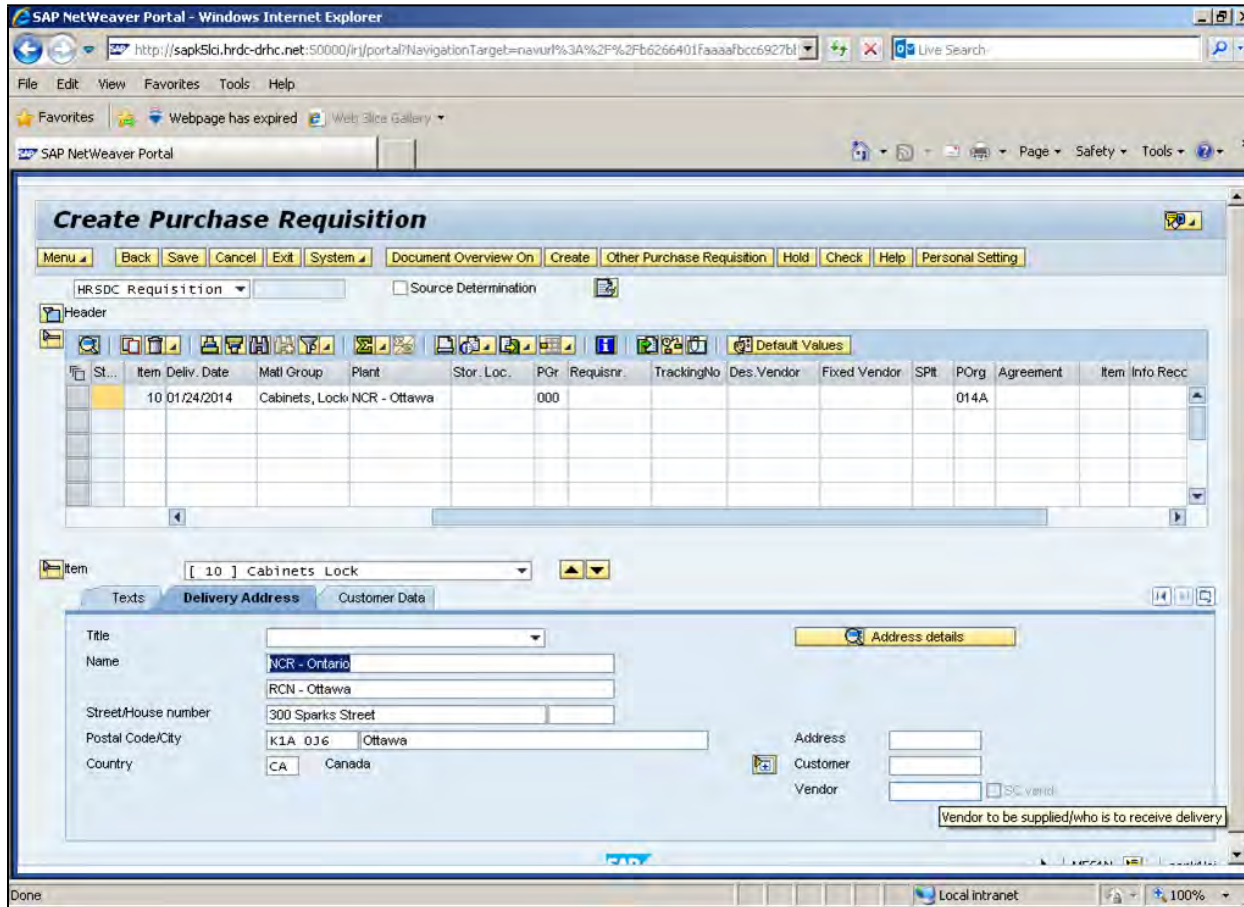
Create Purchase Requisition



20. Click  in the **Item Detail** area.

21. Select **Delivery Address**.

Create Purchase Requisition



22. As required, complete/review the following fields:

Field	R/O/C	Description
Vendor	R	The code used to identify the supplier/organization from which a good or service will be purchased or to which the department will make payments. Example: G999



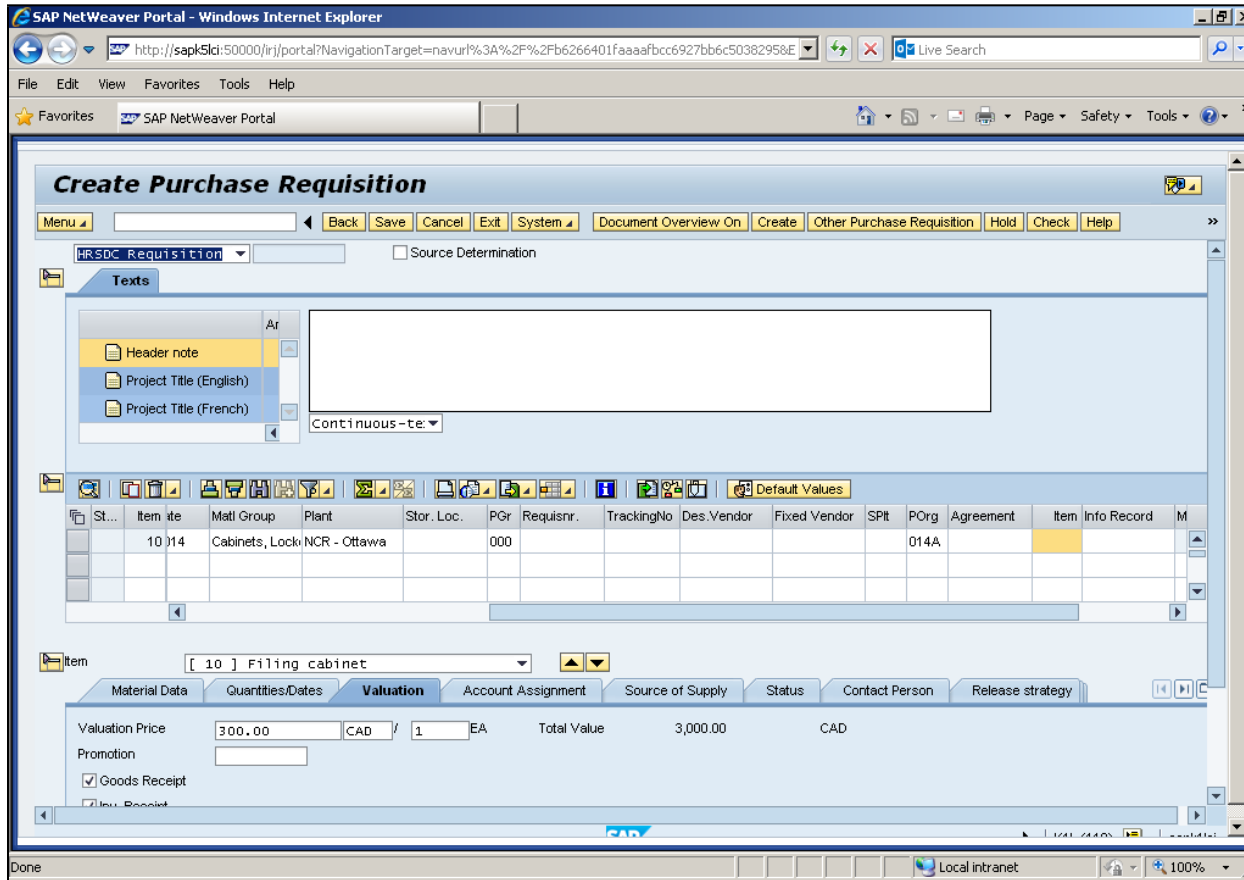
In the **Vendor** field, enter the consignee code for the applicable delivery address. The address fields will now be populated automatically with the new address.



Next we will enter **mandatory** project titles, in English and French, for the purchase requisition.

23. Click  in the **Header** area.

Create Purchase Requisition



24. Click  .

25. As required, complete/review the following fields:

Field	R/O/C	Description
Project Title (English)	R	The title of the purchase requisition, in English. Example: Filing cabinets for office

Create Purchase Requisition

The screenshot displays the SAP NetWeaver Portal interface for creating a purchase requisition. The browser window is titled "SAP NetWeaver Portal - Windows Internet Explorer". The URL is <http://sapk5ldi:50000/irj/portal?NavigationTarget=navur%3A%2F%2Fb6266401faaaafbcc6927bb6c50382958E>. The page title is "Create Purchase Requisition".

The interface includes a menu bar with buttons: Back, Save, Cancel, Exit, System, Document Overview On, Create, Other Purchase Requisition, Hold, Check, Help. Below the menu bar, there is a section for "Texts" with a list of document types: Header note, Project Title (English), and Project Title (French). The "Project Title (English)" is selected, and the text "Filing cabinets for office" is entered in the text area. The text area is labeled "Continuous-te".

Below the text area is a table with columns: St..., Item ite, Matl Group, Plant, Stor. Loc., PGr, Requirnr, TrackingNo, Des. Vendor, Fixed Vendor, SPlt, POrg, Agreement, Item, Info Record, M. The table contains one row with the following data:

St...	Item ite	Matl Group	Plant	Stor. Loc.	PGr	Requirnr	TrackingNo	Des. Vendor	Fixed Vendor	SPlt	POrg	Agreement	Item	Info Record	M
	10 014	Cabinets, Lock	NCR - Ottawa		000						014A				

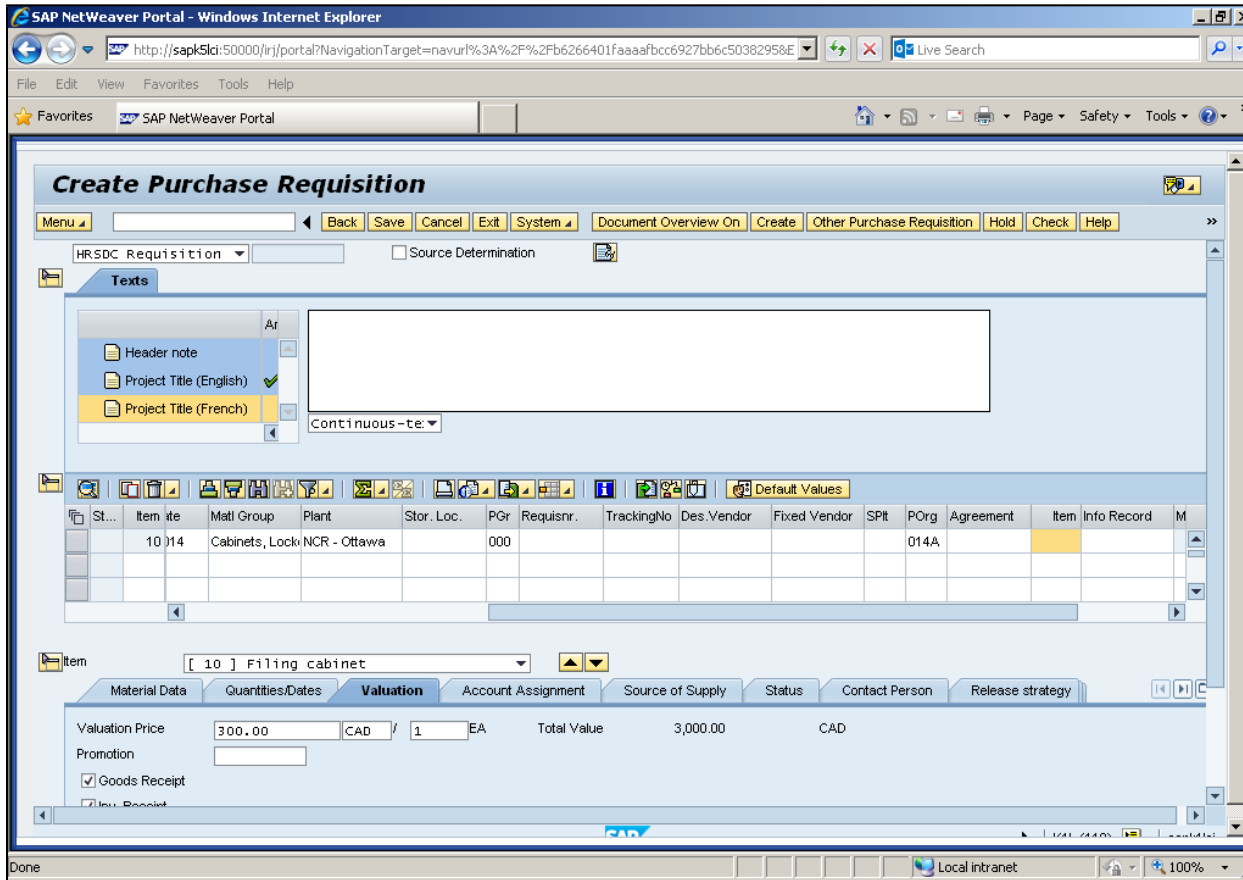
Below the table is an "Item" section with a dropdown menu showing "[10] Filing cabinet". The "Item" section has tabs for: Material Data, Quantities/Dates, Valuation, Account Assignment, Source of Supply, Status, Contact Person, Release strategy. The "Valuation" tab is active, showing the following data:

Valuation Price	Unit	Total Value	Unit
300.00	CAD	3,000.00	CAD

There are also checkboxes for "Goods Receipt" (checked) and "Invt Receipt" (unchecked).

26. Click Project Title (French) .

Create Purchase Requisition



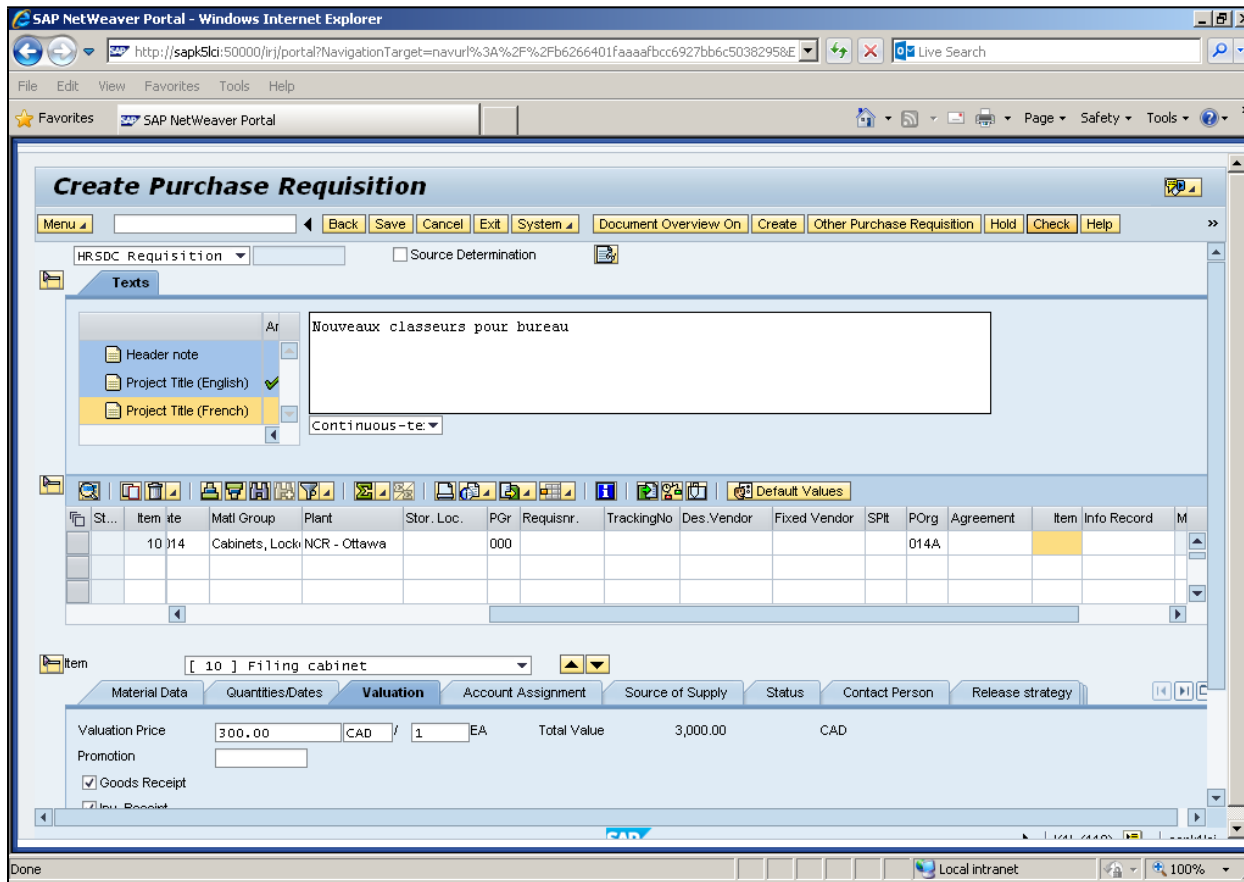
27. As required, complete/review the following fields:

Field	R/O/C	Description
Project Title (French)	R	The title of the purchase requisition, in French. Example: Nouveaux classeurs pour bureau



Lastly, we will check the data and save the purchase requisition.

Create Purchase Requisition

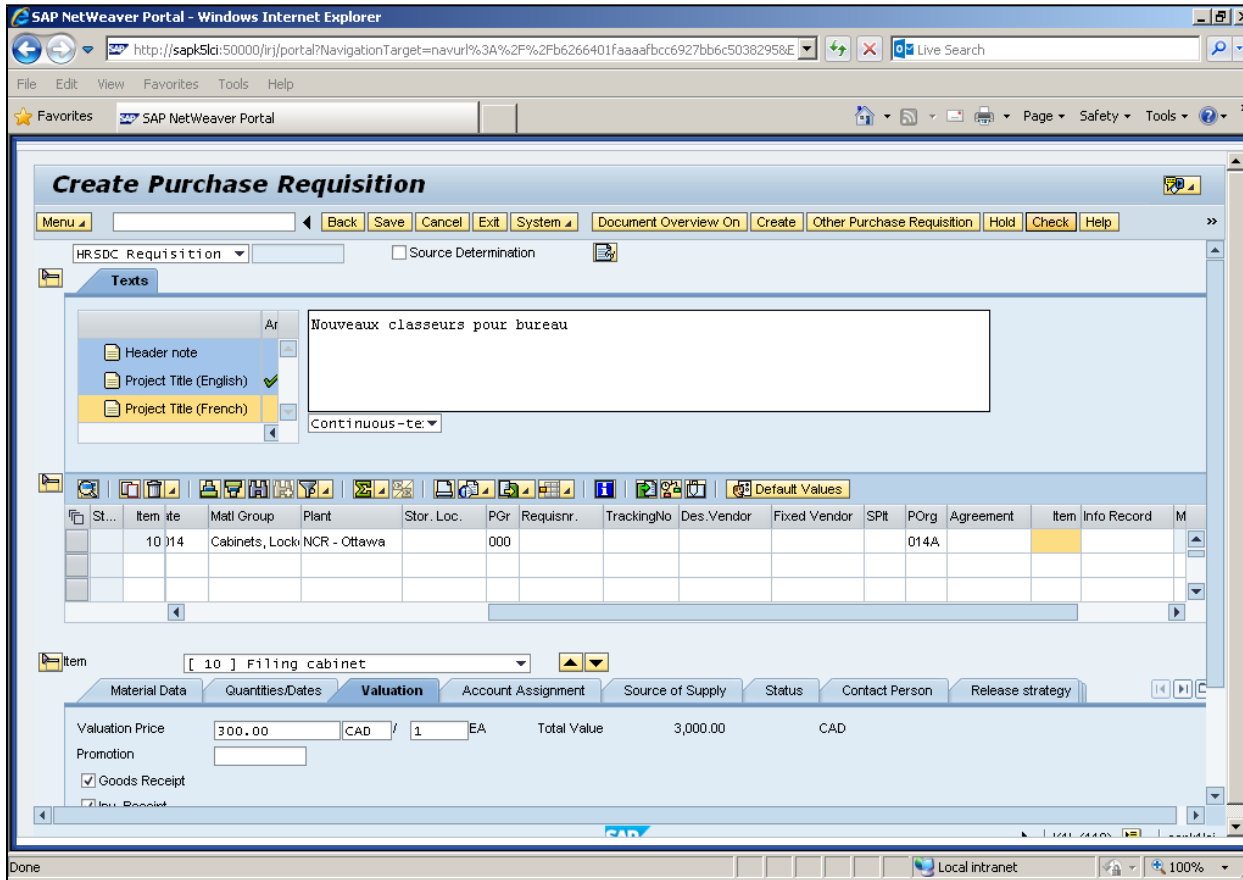


28. Click **Check**.



The message "No messages issued during check" is displayed in the status bar.

Create Purchase Requisition



29. Click **Save**.



The message *"Purchase requisition saved under the number XXXXXXXXXXXX"* is displayed in the status bar.



We will close the browser window, in which the purchase requisition was displayed, and log return to the previous myEMS (SAP) Portal window.

Create Purchase Requisition

30. Click .

Result

You have successfully created a purchase requisition for goods.

Purpose

Use this procedure to create a purchase requisition, for planned or unplanned services, in the MyEMS Portal, including:

- Navigating to the create purchase requisition screen
- Selecting the document type
- Entering a line item for *planned* service, in the **Item Overview** area
- Entering a line item on the **Services** tab in the **Item Detail**
- Entering a line item for a *unplanned* service, in the **Item Overview** area
- Entering an amount for the overall limit and for the expected value, on the **Limit tab**
- Entering a title for the purchase requisition, in English and French
- Entering account assignment data
- Copying the account assignment data to subsequent line items

Trigger

Perform this procedure when you need to create a purchase requisition, for planned or unplanned services, in the MyEMS Portal.

Prerequisites

- You must know the applicable general ledger account, cost center, fund and functional area

Portal

Use the following link to access the myEMS (SAP) Portal: <https://sapk5pci.service.gc.ca/irj/portal>

Transaction Code

- N/A

Helpful Hints

- A purchase requisition is an internal document that defines a need for goods or services

Procedure

1. Start by accessing the myEMS (SAP) Portal.

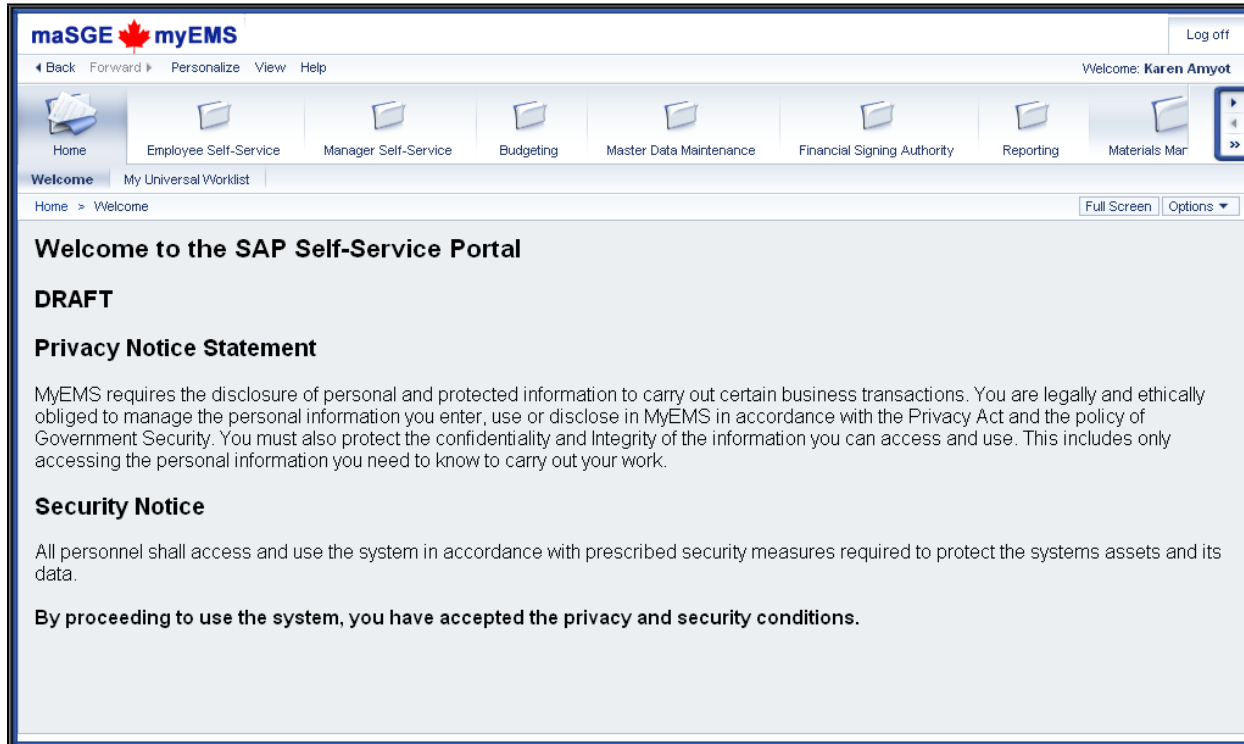


The data shown in this procedure is for example purposes only. When you perform this transaction, please enter the applicable data for your requirements.



First we will navigate to the create purchase requisition screen.

Welcome



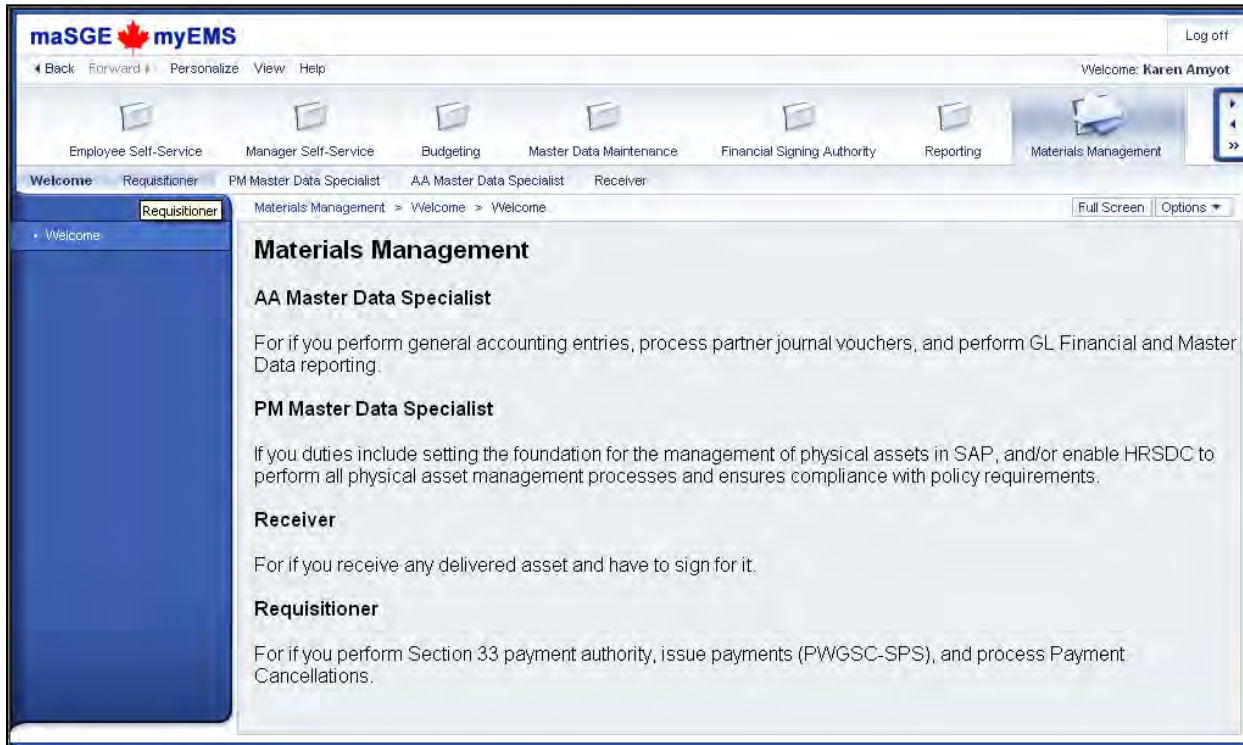
The screenshot shows the SAP Self-Service Portal interface. At the top, there is a navigation bar with the maSGE myEMS logo, a 'Log off' button, and a 'Welcome: Karen Anyot' message. Below the navigation bar is a menu with icons for Home, Employee Self-Service, Manager Self-Service, Budgeting, Master Data Maintenance, Financial Signing Authority, Reporting, and Materials Mar. The main content area displays a 'Welcome to the SAP Self-Service Portal' message, followed by a 'DRAFT' status and a 'Privacy Notice Statement'. The privacy notice states that MyEMS requires the disclosure of personal and protected information to carry out certain business transactions and that users are legally and ethically obliged to manage this information in accordance with the Privacy Act and the policy of Government Security. Below the privacy notice is a 'Security Notice' which states that all personnel shall access and use the system in accordance with prescribed security measures. At the bottom of the security notice, it says 'By proceeding to use the system, you have accepted the privacy and security conditions.'

- 2.



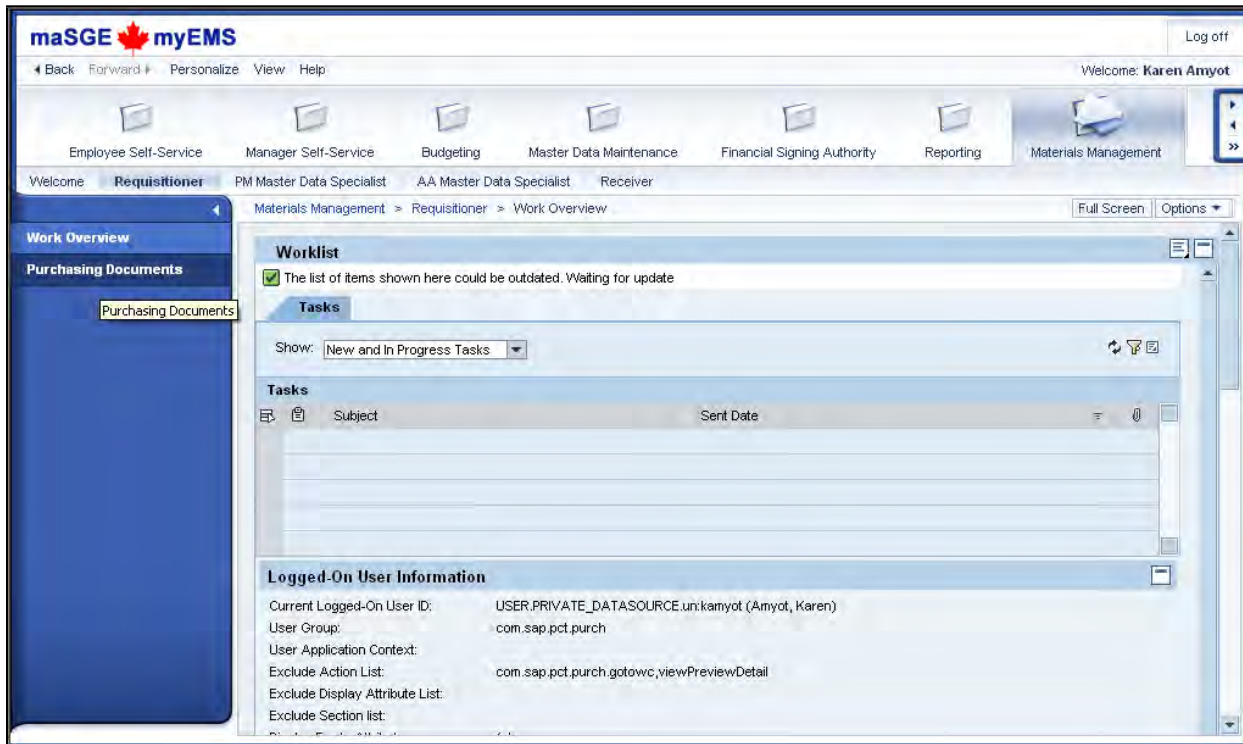
Click  Materials Mar

Welcome



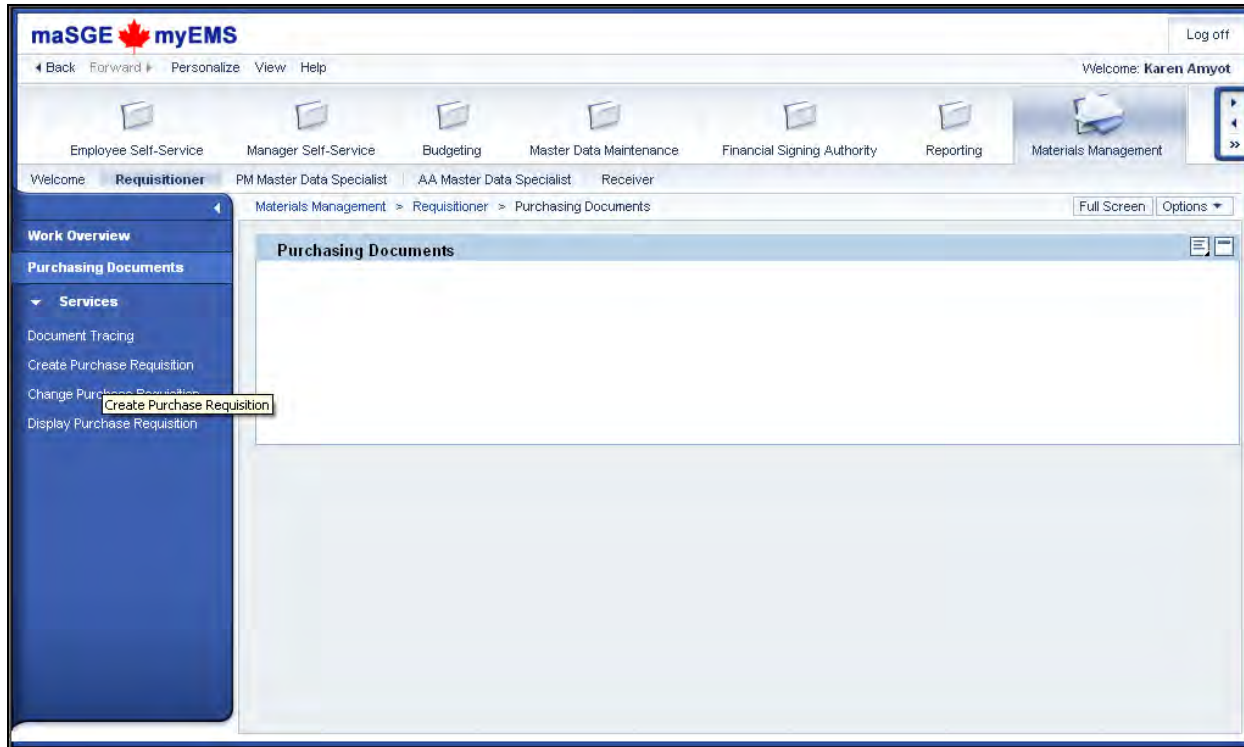
3. Click **Requisitioner**

Overview



4. Click **Purchasing Documents**

Purchasing Documents




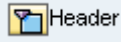
5. Click **Create Purchase Requisition**



The *Create Purchase Requisition* screen is displayed in a new browser window

- The screen has three areas: **Header**, **Item Overview** and **Item Detail**.
- Click to expand an area.
- Click to collapse an area

Create Purchase Requisition

6. Click  beside the unlabelled field above .




7. Select **HRSDC Requisition**.



Now we will enter a line item for *planned* services, in the **Item Overview** area.



If you want to save time by copying an existing purchase requisition that has similar items

1. Click the  button to open the document overview pane (if it isn't already open).
2. Click .
3. Select **My purchase requisitions** from the menu.
4. In the **Document Overview** pane, click on the line item number of the purchase requisition that you want to copy.
5. Click .

The fields are now populated with the data from this purchase requisition.



You enter *planned* and *unplanned* services as separate line items, in the **Item Overview** area.

- When you enter a line item for services, you must enter **D** in the **I** (item category) field. Then two additional tabs will be displayed in the **Item Detail** area.
- On the **Service** tab, you enter data for *planned* services, which means that you know the rate and the duration of the service

- For example, if a consultant's services are required for 40 days at a per diem of \$100/day
- On the **Limit** tab you enter *unplanned* services, which means that you do not know the precise nature of service, quantity and price of the service
 - For example, if a consultant must travel and the travel expenses are not known

Create Purchase Requisition

8. As required, complete/review the following fields:


Field	R/O/C	Description
A	R	Account Assignment Category - Specifies whether accounting for an item is to be effected by an auxiliary account (such as, a cost center). Example: K
I	R	Item Category in Purchasing Document - Key defining how the procurement of a material or service item is controlled. Example: D
Short Text	R	Short description for procurement of goods or services, 40 characters in length. Example: Graphic designer

9. Press "Return".
10. Press "Return".

Create Purchase Requisition

11. As required, complete/review the following fields:

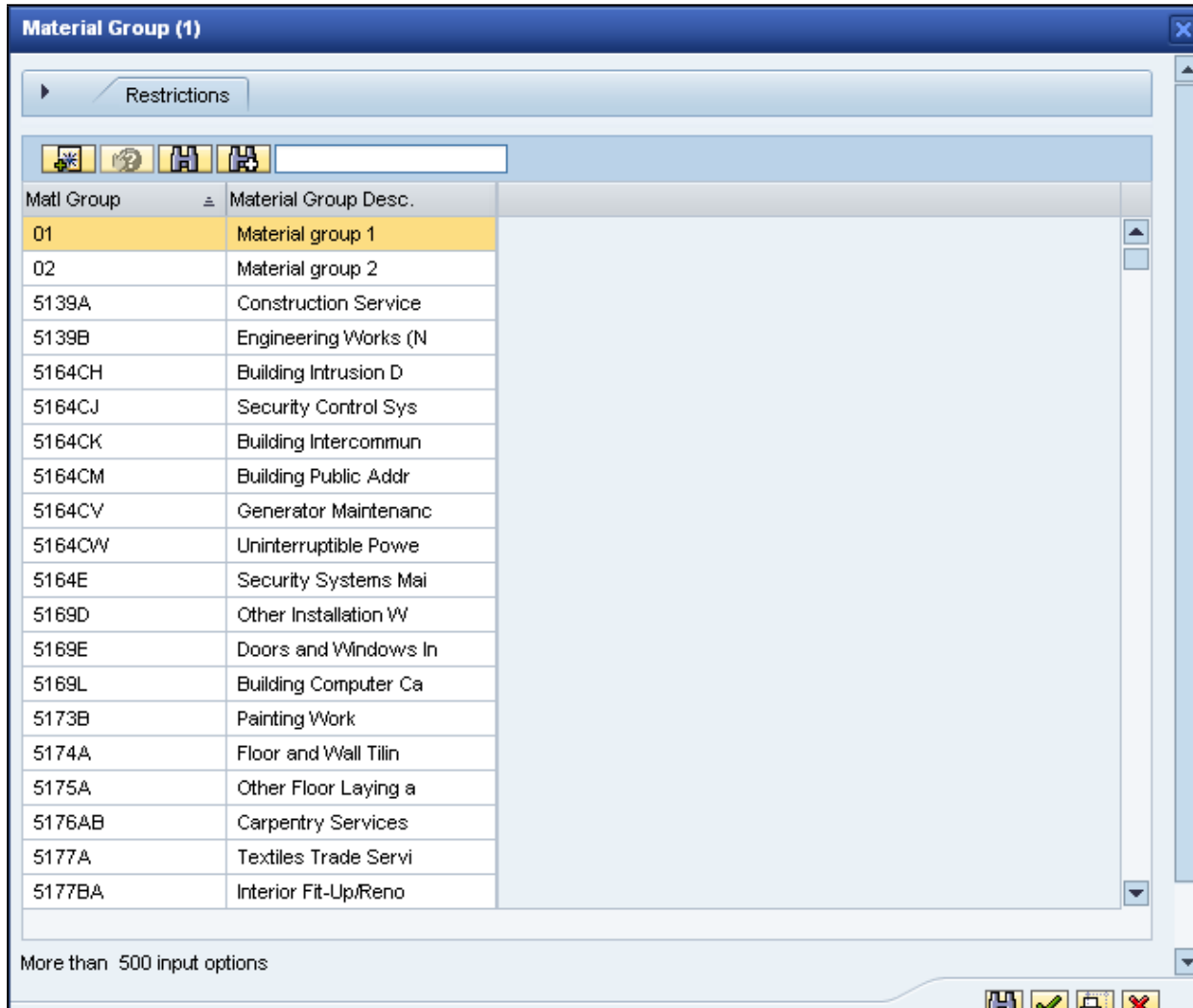
Field	R/O/C	Description
Deliv. Date	R	The proposed date by which the customer should receive the goods or services. Example: 13.03.2014

12. Click  beside the **Matl Group** field.



The material group number is the same as the **Goods and Service Identification Number (GSIN)**.

Material Group (1)



13. As required, complete/review the following fields:

Field	R/O/C	Description
Search field	R	<p>Meaningful word that uniquely describes the master data record. The system uses terms from the search field to locate the master data record during a search function.</p> <p>Example: GRAPHIC DESIGN</p>

14. Click .

Material Group (1)

Matl Group	Material Group Desc.
T002AJ	Graphic Design and E
T002AJA	Graphic Design Servi
T002AK	Research and Writing
T002D	Corporate Sponsorshi
T002G	Internet Communicati
T002GA	Website communicatio
T002GB	Website content main
T002GC	Website analysis and
T002GD	Webcasting
T002GE	Streaming audiovisua
T002GF	Internet based commu
T002GG	Conversion of print
T002GJ	Design of graphics f
T003A	Advertising
T003AH	Public Relations Ser
T004A	Public Relations Ser
T004AB	Public Relations Pla
T004B	Events Planning and
T004BA	Conference Planning
T004D	Media Analysis

Entry found

15. Select .

16. Click .

Create Purchase Requisition

17. As required, complete/review the following fields:

Field	R/O/C	Description
Plant	R	A high-level organizational unit used to subdivide a department for the purpose of reporting on and controlling various procurement and material management functions from a logistics perspective. Example: NONA
PGr	R	An organizational unit used to allow departments to identify the person or group responsible for the applicable purchasing activity. Example: 000



We will scroll right to view more fields.

18. Click  to scroll right.

Create Purchase Requisition

19. As required, complete/review the following fields:

Field	R/O/C	Description
POrg	R	An organizational unit used by departments to identify the organization responsible for the negotiation and creation of purchasing documents. Example: 014A

Create Purchase Requisition

Create Purchase Requisition

Menu ▾ | Back | Save | Cancel | Exit | System ▾ | Document Overview On | Create | Other Purchase Requisition | Check | Display Messages

HRSDC Requisition ▾ | Source Determination

Header

St...	Item	Plant	Stor. Loc.	PGr	Requisnr.	TrackingNo	Des. Vendor	Fixed Vendor	SPt	POrg	Agreement	Item Info Record	MPN Material
	10	NONA		000						014A			

Item: [10] Graphic designer

Services | Limits | Material Data | Quantities/Dates | **Valuation** | Account Assignment | Source of Supply | Status | Contact Person

Valuation Price: 0.00 / 1 | Total Value: 0.00

20. Press "Return".

21. Press "Return".



The **Services** tab is automatically displayed, in the **Item Detail** area.

- We will enter services data on this tab.

Create Purchase Requisition

22. As required, complete/review the following fields:

Field	R/O/C	Description
Short Text	R	Short description for procurement of goods or services, 40 characters in length. Example: Graphic designer
Quantity	R	The quantity being ordered, received or transferred. Example: 100
Un	R	Base unit of measure. Unit of measure in which stocks of the material are managed. The system converts all the quantities you enter in other units of measure (alternative units of measure) to the base unit of measure. Example: HR
Gross Price	R	The unit price of a good or service to be procured prior to applying discounts or surcharges. Example: 100.00

23. Press "Return".

24. Press "Return".



The account assignment dialogue box, for this *first* line item, is displayed.

Account Assignment of Service in Line 10


25. As required, complete/review the following fields:

Field	R/O/C	Description
G/L Account	R	The detailed financial code used by departments to identify the nature of a transaction from a General Ledger perspective (for example, Supplies, Inventory). Example: 533001
Cost Center	R	The detailed financial code used by departments to identify the responsibility center accountable for the transaction from a cost management perspective. Example: 200030
Fund	R	The detailed financial code used to identify the departmental source of funding applicable to a transaction from a funds management perspective. Example: B001

Field	R/O/C	Description
Functional Area	R	An input code that uniquely identifies the activity element of a specific program in the Program Activity Architecture (PAA). Program activities are the major subdivisions of a program. Most departments and agencies disaggregate programs below the activity level to the activity element level. Example: 0140-1001

26. Click 



The function  copies the account assignment data to any subsequent line items that you may enter. You can overwrite the data, if applicable.



Now we will enter a second line item, on the **Services** tab, for a *planned* service.

Create Purchase Requisition

27. As required, complete/review the following fields:

Field	R/O/C	Description
Short Text	R	Short description for procurement of goods or services, 40 characters in length. Example: Jr. graphic designer

Field	R/O/C	Description
Quantity	R	The quantity being ordered, received or transferred. Example: 25
Un	R	Base unit of measure. Unit of measure in which stocks of the material are managed. The system converts all the quantities you enter in other units of measure (alternative units of measure) to the base unit of measure. Example: HR
Gross Price	R	The unit price of a good or service to be procured prior to applying discounts or surcharges. Example: 60.00

28. Press "Return".

29. Press "Return".



The account assignment dialogue box, for the *second* line item on the **Services** tab, for an *planned* service, is displayed.

- The account assignment data that we entered for the first line item, on the **Services** tab, has been copied to this line item.

Account Assignment of Service in Line 20

Account Assignment of Service in Line 20

G/L Account	<input type="text" value="533001"/>		Company Code	<input type="text" value="0140"/>
CO Area	<input type="text" value="0140"/>			
Cost Center	<input type="text" value="200030"/>			
Fund	<input type="text" value="B001"/>			
Functional Area	<input type="text" value="0140-1001"/>		Funded Program	<input type="text" value="00000"/>
Funds Center	<input type="text" value="200030"/>			
Earmarked Funds	<input type="text"/>	<input type="text"/>		

Rep. Acct Assgt

30. Click

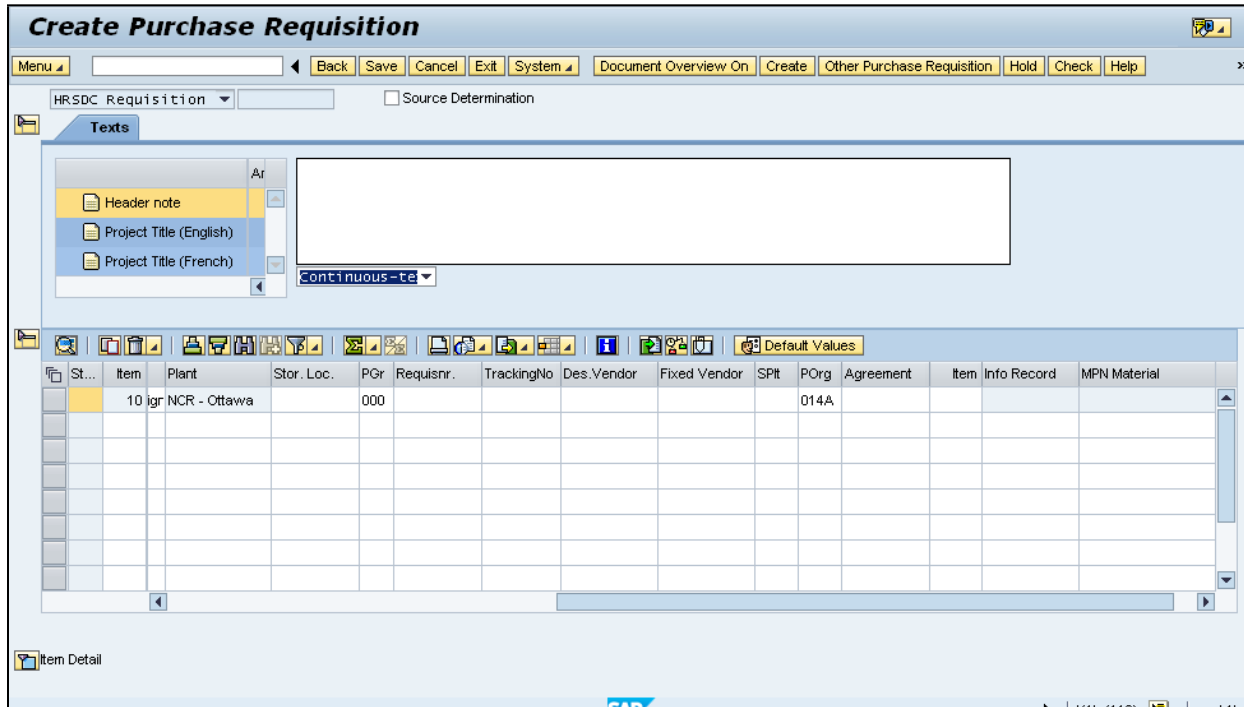


We will enter a title for the purchase requisition, in both English and French.

Create Purchase Requisition

31. Click  in the Header area.

Create Purchase Requisition



32. Click Project Title (English) .

33. As required, complete/review the following fields:

Field	R/O/C	Description
Project Title (English)	R	The title of the purchase requisition, in English. Example: Graphic design services

34. Click Project Title (French) .

Create Purchase Requisition

35. As required, complete/review the following fields:

Field	R/O/C	Description
Project Title (French)	R	The title of the purchase requisition, in French. Example: Services de conception graphique



Next we will enter a line item for an *unplanned* service, in the **Item Overview** area.

Create Purchase Requisition

Create Purchase Requisition

Menu | Back | Save | Cancel | Exit | System | Document Overview On | Create | Other Purchase Requisition | Hold | Check | Help

HRSDC Requisition | Source Determination

Texts

- Header note
- Project Title (English) ✓
- Project Title (French)

continuous-te

St...	Item	Plant	Stor. Loc.	PGr	Requisnr.	TrackingNo	Des. Vendor	Fixed Vendor	SPlt	POrg	Agreement	Item Info Record	MPN Material
	10	igr	NCR - Ottawa		000					014A			

Item Detail

36. Click  in the **Header** area.

Create Purchase Requisition

Create Purchase Requisition

Menu | Back | Save | Cancel | Exit | System | Document Overview On | Create | Other Purchase Requisition | Hold | Check | Help | Personal Setting

HRSDC Requisition | Source Determination

Header

St...	Item	A	I	Material	Short Text	Quantity	Unit	C	Deliv. Date	Matl Group	Plant	Stor. Loc.	PGr	Requisnr.	TrackingNo
	10	K	D		Graphic designer	1	AU	D	13.03.2014	Graphic Desigr	NCR - Ottawa		000		

Item [10] Graphic designer

Services | Limits | Material Data | Quantities/Dates | Valuation | Account Assignment | Source of Supply | Status | Contact Person

Line	...	Service No.	Short Text	Quantity	Un	Gross Price	Crcy	Overf.
10			Graphic designer	100.0	HR	100.00	CAD	
20			Jr. graphic designer	25.0	HR	60.00	CAD	
30							CAD	
40							CAD	
50							CAD	
60							CAD	
70							CAD	
80							CAD	
90							CAD	
100							CAD	

37. As required, complete/review the following fields:

Field	R/O/C	Description
A	R	Account Assignment Category - Specifies whether accounting for an item is to be effected by an auxiliary account (such as, a cost center). Example: K
I	R	Item Category in Purchasing Document - Key defining how the procurement of a material or service item is controlled. Example: D
Short Text	R	Short description for procurement of goods or services, 40 characters in length. Example: Travel
Deliv. Date	R	The proposed date by which the customer should receive the goods or services. Example: 13.03.2014
Matl Group	R	A number used by departments to group similar materials for reporting and analysis purposes. The material group is used to represent the PWGSC GSIN to ensure consistency in reporting. Example: V502A
Plant	R	A high-level organizational unit used to subdivide a department for the purpose of reporting on and controlling various procurement and material management functions from a logistics perspective. Example: NONA
PGr	R	An organizational unit used to allow departments to identify the person or group responsible for the applicable purchasing activity. Example: 000



We will scroll right to view more fields.

38. Click  to scroll right.

Create Purchase Requisition

39. As required, complete/review the following fields:

Field	R/O/C	Description
POrg	R	An organizational unit used by departments to identify the organization responsible for the negotiation and creation of purchasing documents. Example: 014A

40. Press "Return".

41. Press "Return".



Next, we will enter limits for the *unplanned* service, on the **Limits** tab.

Create Purchase Requisition

42. Click **Limits**.

Create Purchase Requisition

43. As required, complete/review the following fields:

Field	R/O/C	Description
Overall Limit	R	The maximum value for all unplanned services covered for this line item. Example: 5000
Expected value	R	Value that the unplanned services (or the material) covered by this item are not expected to exceed. Example: 5000

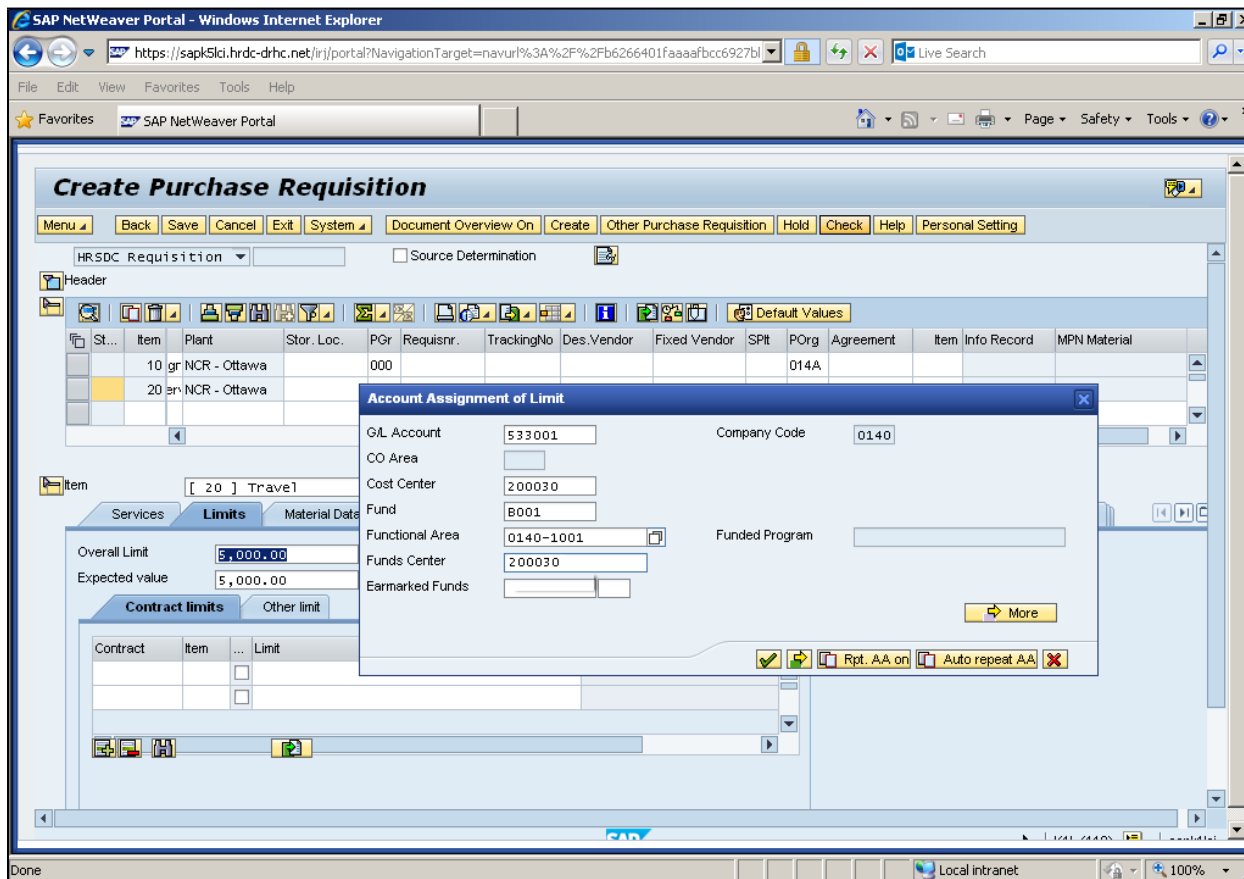
44. Press "Return".

45. Press "Return".



For the limit, we will accept the account assignment data that was copied from the first line item.






Account Assignment of Limit



46. Click

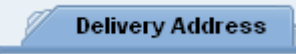


If you need to change the account assignment information for a line item

1. At the top centre of the Item detail area, click  to select the appropriate line item
2. Click  or .
3. Click the . The **Account Assignment for Services or Limits in Line (number)** dialog box opens.
4. Enter the correct information.
5. Click  to close the dialog box and apply the data.



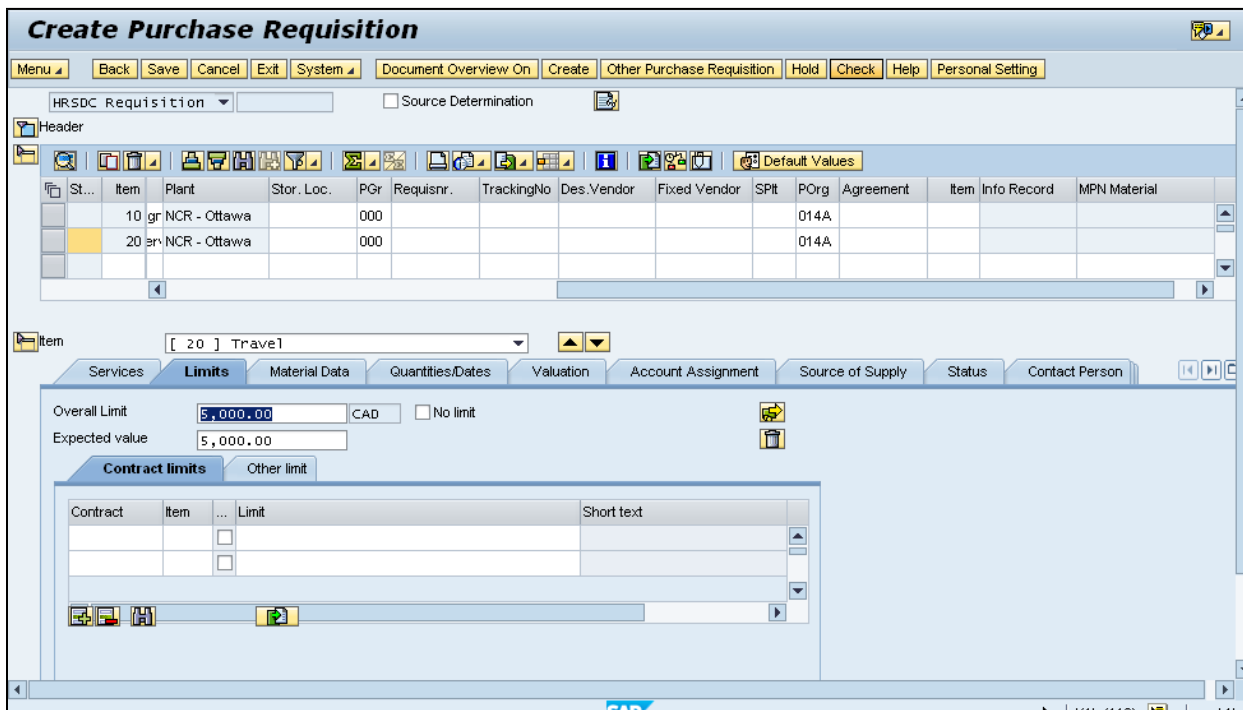
If delivery address for the service(s) is different from the delivery address of the plant:

1. Click .
2. In the **Vendor** field, enter the *consignee code* for the applicable delivery address (the address fields will be populated automatically with the new address).



Lastly, we will check the data and save the purchase requisition.

Create Purchase Requisition



Create Purchase Requisition

Menu Back Save Cancel Exit System Document Overview On Create Other Purchase Requisition Hold Check Help Personal Setting

HRSDC Requisition Source Determination

Header

St...	Item	Plant	Stor. Loc.	PGr	Requisnr.	TrackingNo	Des. Vendor	Fixed Vendor	SPlt	POrg	Agreement	Item	Info Record	MPN Material
	10 gr	NCR - Ottawa		000						014A				
	20 sr	NCR - Ottawa		000						014A				

Item [20] Travel

Services **Limits** Material Data Quantities/Dates Valuation Account Assignment Source of Supply Status Contact Person

Overall Limit 5,000.00 CAD No limit

Expected value 5,000.00

Contract limits Other limit

Contract	Item	...	Limit	Short text
		<input type="checkbox"/>		
		<input type="checkbox"/>		

47. Click .



The message "No messages issued during check" is displayed in the status bar.

Create Purchase Requisition

48. Click **Save**.



The message "Purchase requisition number XXXXXXXXXXXX created" is displayed in the status bar.



We will close this browser window, and return to the previous MyEMS Portal window.

Create Purchase Requisition

The screenshot shows the SAP NetWeaver Portal interface for creating a purchase requisition. The browser window title is "SAP NetWeaver Portal - Windows Internet Explorer". The address bar shows the URL: <https://sapk1ci.hrdc-dhrc.net/irj/portal?NavigationTarget=navurl!%3A%2F%2Fb6266401faaaafbcc6927bl>. The page title is "Create Purchase Requisition".

At the top, there is a menu bar with options: Menu, Back, Save, Cancel, Exit, System, Document Overview On, Create, Other Purchase Requisition, Hold, Check, Help, Personal Setting. Below this is a dropdown menu for "HRSDC Requisition" and a checkbox for "Source Determination".

The main area is a table with the following columns: St..., Item, Plant, Stor. Loc., PGr, Requisnr., TrackingNo, Des. Vendor, Fixed Vendor, SPit, POrg, Agreement, Item Info Record, MPN Material. The table is currently empty.

At the bottom of the table area, there is a section for "Item" with a dropdown menu set to "New Item" and two arrow buttons. Below this, a status bar shows a green checkmark and the text "Purchase requisition number 0100000169 created". The SAP logo is also visible.

The browser status bar at the bottom shows "Done", "Local intranet", and "100%".

49. Click .

Result

You have successfully created a purchase requisition for planned or unplanned services in the MyEMS Portal.

Find and Display a Purchase Requisition in the Portal

Step by Step

Scenario

This will show you how to find a purchase requisition in the MyEMS (SAP) Portal using different search criteria such as:

- Requisitioner
- Short text for the item that was requested

Procedure

1. Start by accessing the myEMS (SAP) Portal.



2. Click  Materials Mar.





3. Click  Requisitioner.



4. Click  Purchasing Documents.



5. Click  Display Purchase Requisition.

 Always click  (top right corner) to expand your window to its full size.



6. Click  Document Overview On.



7. Click .

8. Click **Purchase Requisitions**.



Purchase Requisitions


9. As required, complete/review the following fields:

Field	R/O/C	Description
Name of Requisitioner/Requester	R	Person requesting the service or material. Data to enter: Applicable This field is free-text and case sensitive; if you can't find anything, try again in upper or lower case. Users should try to enter their Requisitioner name under the above format which is also the format for your SAP User ID. For this exercise, we are trying to find a purchase requisition requested by Isabelle Canton.
Purchase Requisition Number	R	Purchase Requisition Number Data to enter: Delete the PR number from this field if there is one present.

10. Click **Dynamic selections**.

11. Click  **Purchase Requisition** You need to click on the **black arrow** to expand the folder.

12. Click  multiple times until the **Short Text** field is displayed.

13. Double-click  **Short Text**.

14. As required, complete/review the following fields:

Field	R/O/C	Description
Short Text	R	Short description for procurement of goods or services, 40 characters in length. Data to enter: Applicable Use the asterisk (*) as wildcard to facilitate your search. Also, this field is case sensitive – if your results are not conclusive, you may need to retry using the upper case.

15. Click **Execute**.




All of the purchase requisitions that match your search criteria are now displayed in the **Document Overview** pane.

16. Double-click on APPROPRIATE PREQ.



Display Purchase Req. 100000

17. Click  located at the top right of your screen to close this window.



Purchasing Documents - SAP NetWeaver Portal - Windows Internet Explorer

18. End.

Refer to myEMS Help link for up to date info

Find and Display the Status of a Purchase Requisition in the Portal

Step by Step

Scenario

This will show you how to find a Purchase Requisition in the MyEMS (SAP) Portal using a purchase requisition number and display its status.

There are many ways to search in the system. This is just another way of quickly displaying a Purchase Requisition if you already know its number.

Procedure

1. Start by accessing the myEMS (SAP) Portal.



2. Click  Materials Mar.





3. Click  Requisitioner.



4. Click  Purchasing Documents.



5. Click  Display Purchase Requisition.

 Always click  (top right corner) to expand your window to its full size.



6. Click  Other Purchase Requisition.

7. As required, complete/review the following fields:


Field	R/O/C	Description
Purchase Requisition	R	This represents the number of the Purchase Requisition. Data to enter: Applicable

8. Click .



Display Purchase Req. 100000XXX

9. Click the  tab located in the **Item Detail** section at the bottom of your screen.

10. Click  located at the top right of your screen to close this window.



Purchasing Documents - SAP NetWeaver Portal - Windows Internet Explorer

11. End.

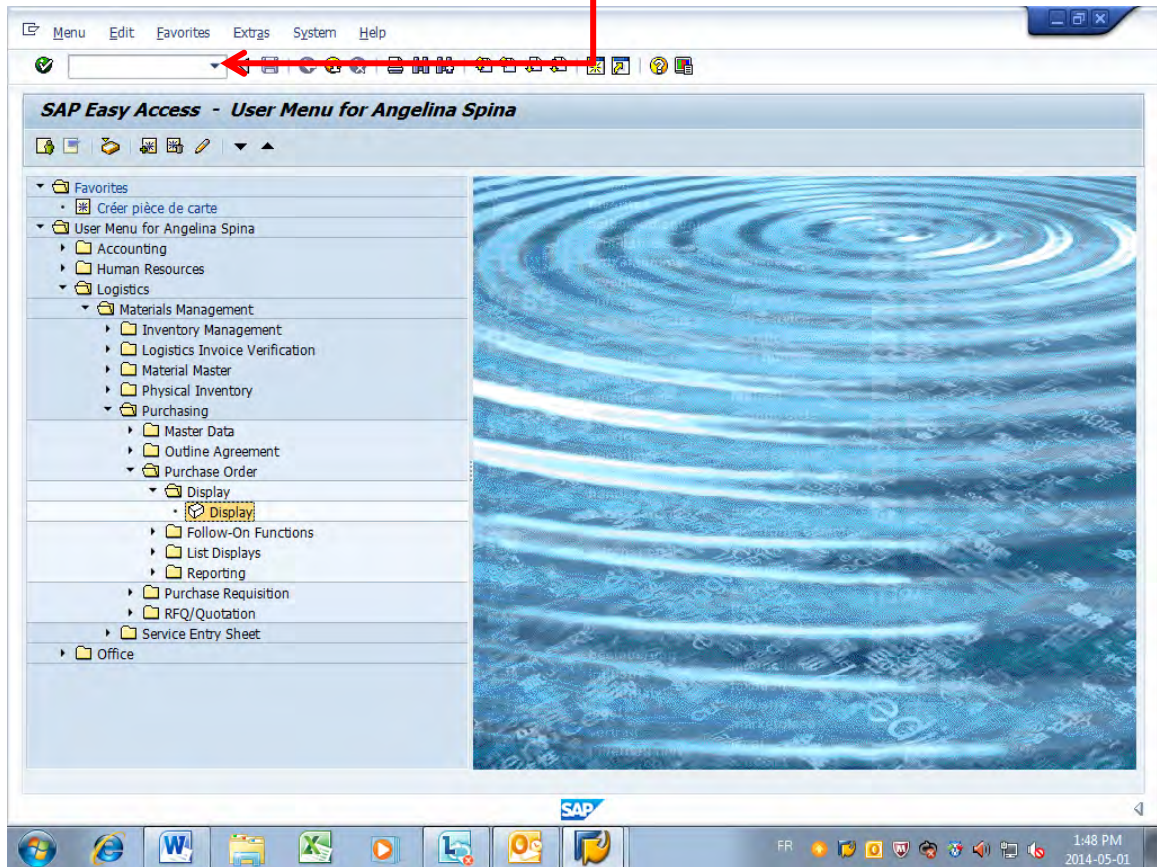
Refer to myEMS Help link

How to Find and Display a Purchase Orders (PO)

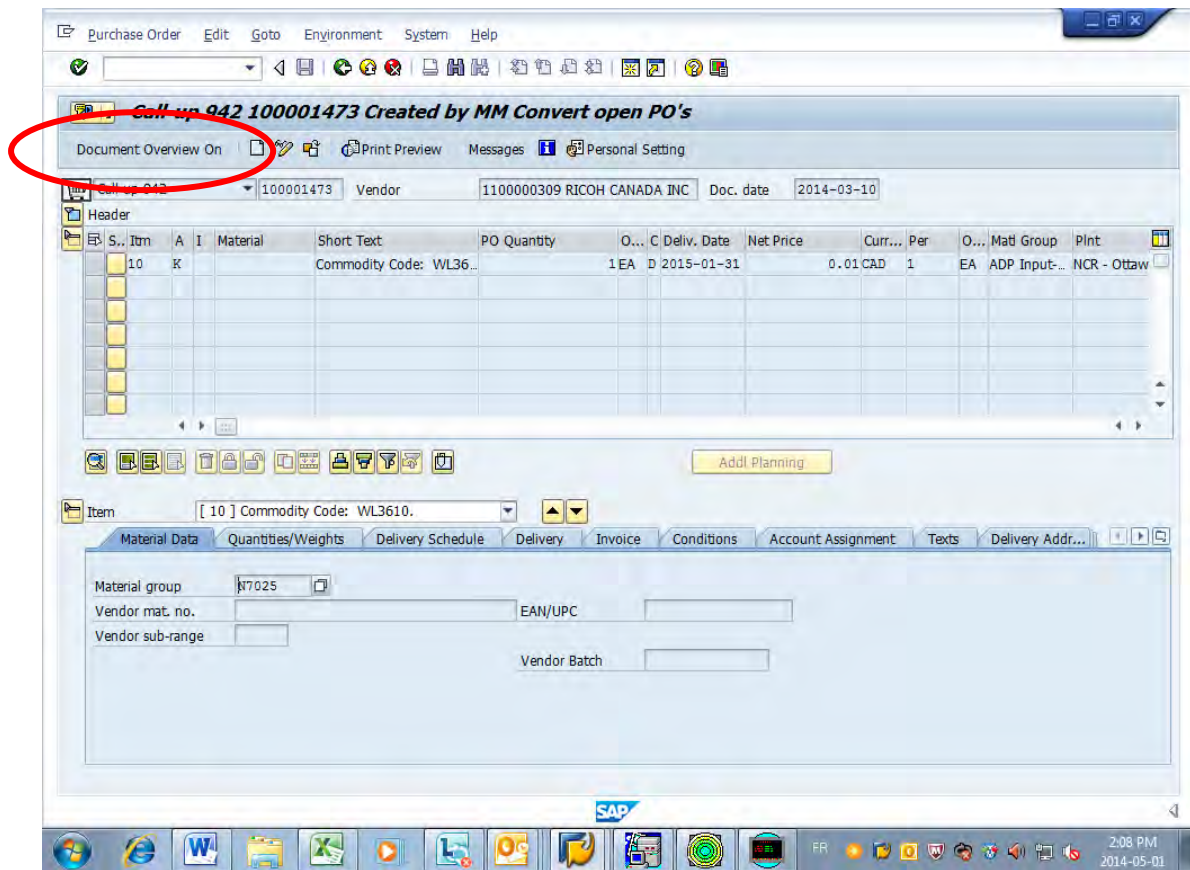
The instructions below apply to the GUI (desktop application) ONLY. The myEMS team is working on developing a report to search and display POs in the portal. Once it is available, we will advise you.

1. Go to myEMS GUI and log on
2. Select “Logistics” tab
3. Select “Material Management”, select Purchasing
4. Select “Purchase Order”
5. Select “Display”

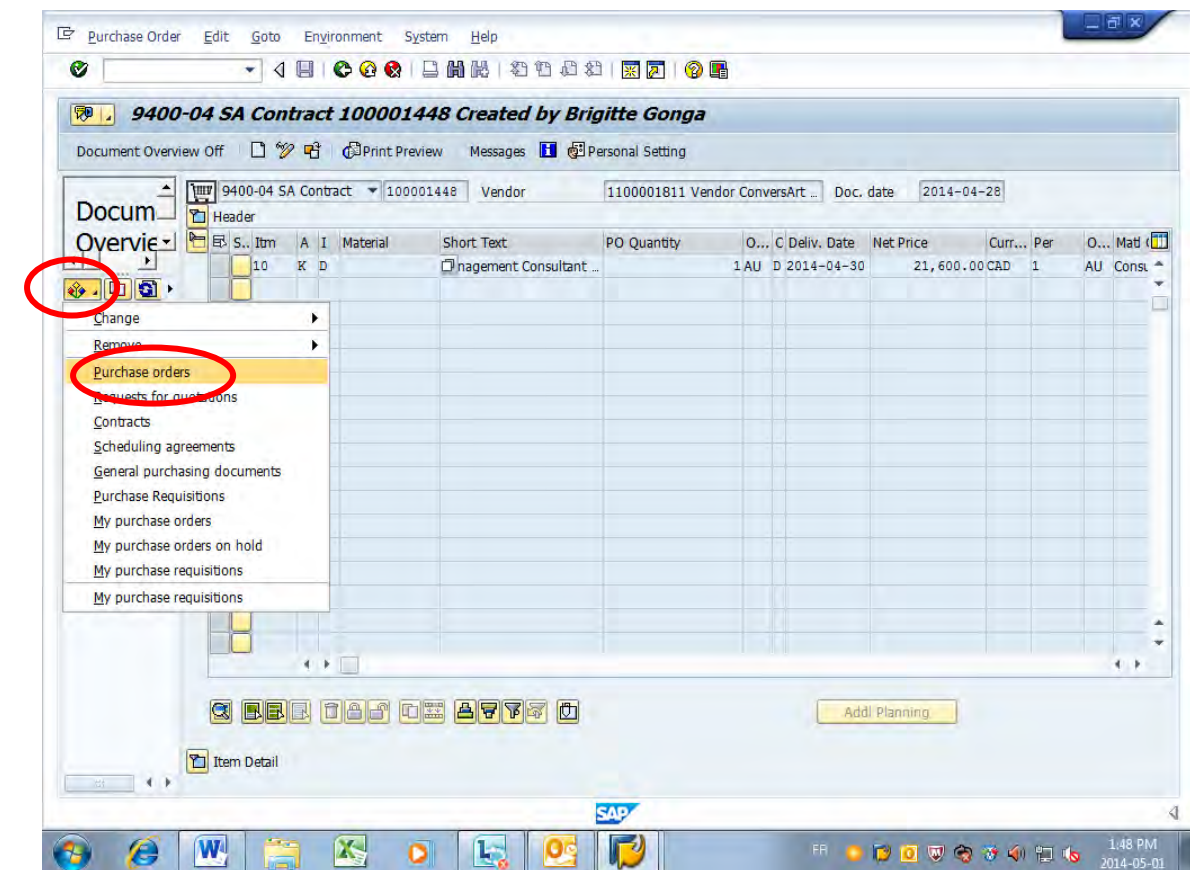
Or enter the Transaction
or T Code ME5A



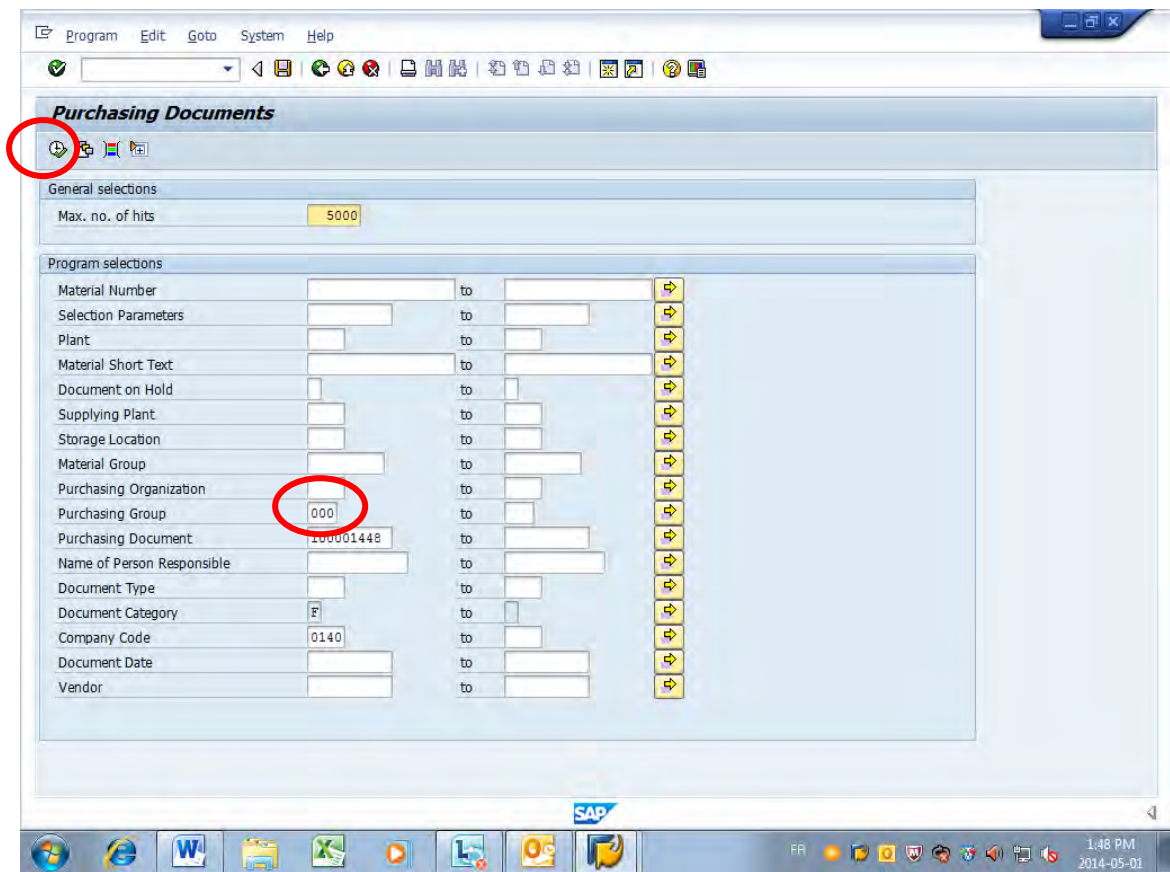
6. Open "Document Overview"



7. Select Variant, Click on "Purchase Order",



8. Enter search criteria, delete 000 in Purchasing Group,



Creating a Card Document in myEMS

TO BEGIN:

Double click on your SAP logon pad (located on your computer desktop) ***also referred to as the gui***

- Click on 'logon' tab (which takes you to the login screen)
- Input your Username
- Input your Password
- Click green checkmark (located on the top left of toolbar)

Double Click

- Accounting Tab
- Financial Accounting
- Accounts Payable
- Payment Cards
- Card Document
- Create Card Document

*****To by-pass this procedure, you can enter the transaction code: CRK1 in the blank field to the right of the green check mark, located in your toolbar*****

Create Card Document (required fields/input)

Card Type: MCBM (drop down menu available to left of this field)

Card No.: Input your MasterCard number

****once you have completed this step once, it is pre-filled every other time****

Transaction Date: Date transaction was authorized by BMO (drop down menu, left of field)

Click on green check on toolbar above to finalize this step.

An information tab appears with the following message: "settings transferred from card master record"

Click on green check in the 'pop-up' box and you will be prompted to complete Card Document Create.

Card Document Create

*The following information is required input in **Transaction Data Field**:*

- **Trans. Amount:** input invoice total (tax included).
- **Authoriz. No.:** input authorization number (from the cashier receipt, invoice or from your BMO online account)
- **Vendor Name:** input vendor name i.e., Speedy Messenger Service.
- **Doc. Text:** input description of expenditure/service (e.g. courier services, pens & binders).

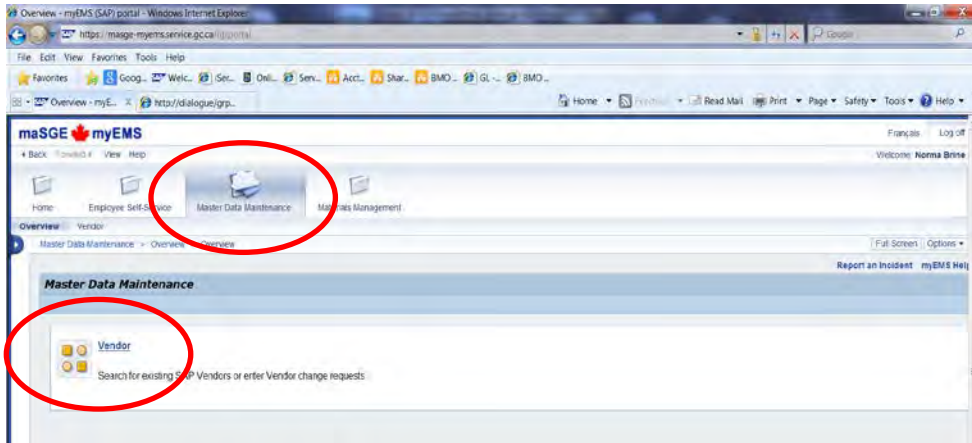
*The following information is required input in **Acct Assgmt Items for FI Document**:*

- **Gross amount:** Input invoice total (tax included) click 'tab'.
- **G/L account:** Input G/L Account (what used to be known as *line object* in CMS) if different from the default for your card (not that all AC have a default for office supplies)
- **Cost Center:** Input Cost Center if different from the default for your card.

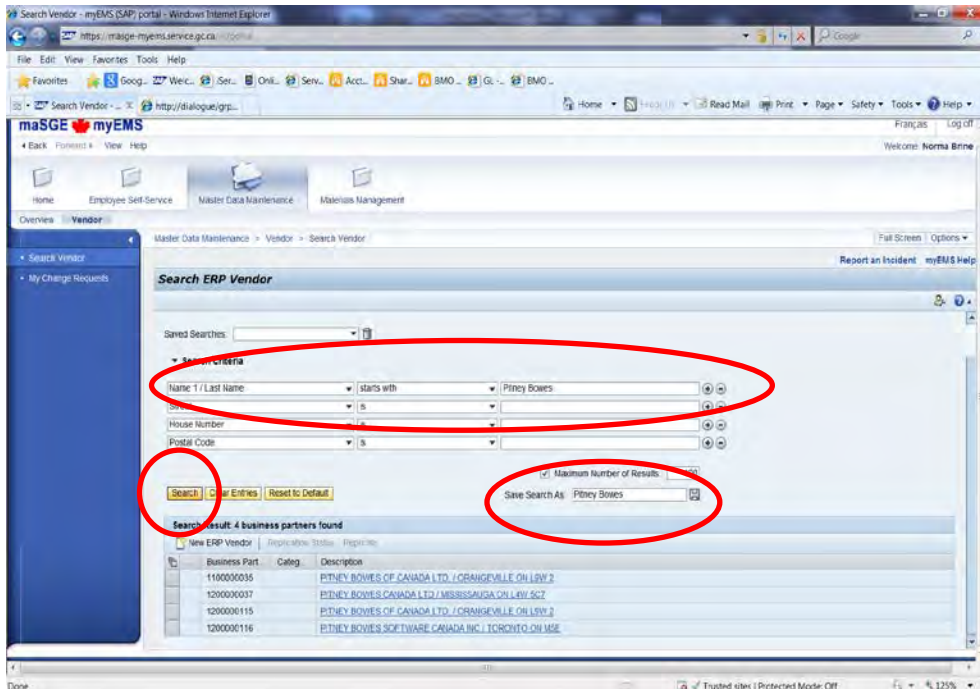
Click 2nd icon (2 boxes) under Card Document Create toolbar (check). Once you receive the following message: "checks completed successfully", you can click on the 'save' icon on the main toolbar – this will provide you with a document #. Record that number on the paper copy of your invoice as reference and in order to clear your BMO at the end of the month.

How to Find a Vendor in myEMS Portal

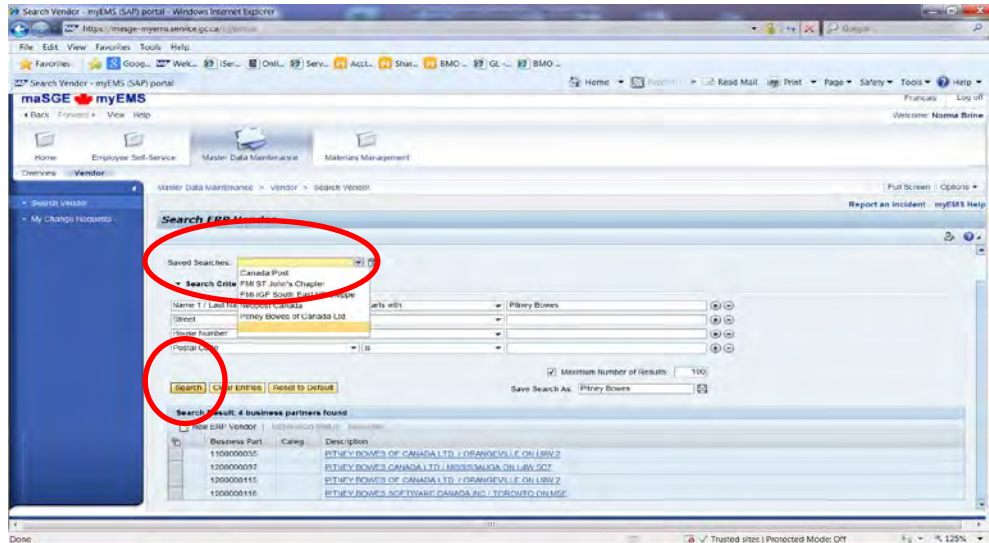
1. Go to myEMS portal and select the “Master Data Maintenance” tab & select “Vendor” (see screen shot below)



2. In the “Search ERP Vendor” screen, in the first column of the search Criteria drop down box select “Name 1/Last Name”; second column drop down select “starts with”; third column write in the name of the vendor.
3. Click on yellow Search box or “enter” from your keyboard.



- When you find the new vendor you require, write the vendor name in the “Save search As box” and click on the “save disk” beside the box (see screen shot above). This will save your vendor in the “Saved Search drop down box” at the top of the page for future reference.
- To find a vendor you’ve already saved in the “Saved Search list” select the vendor and click on the yellow Search box and the information will be displayed



MyEMS (SAP) Transaction Code Cheat Sheet

Procurement and Acquisition Cards

NOTE: Save these as favourites on your desktop so you don't have to type them in. Add your own to the list.

Acquisition Card Transaction Codes (or T-Codes) – myEMS GUI (desktop)

Transaction Code	Activity
CRK1	Create a card document
CRK2	Change a card document
CRK3	Display a card document
ZZCR	AC Unaccepted Transaction Report
ZZCCAR	AC Activity Report
ZZCD	Acquisition Card Unaccepted Transactions
ZZCCVACT	Cad Voucher Activity Report
CRR2	Evaluate Card Documents
ZZCCVR	Outstanding Card Voucher Report

Purchasing Transaction Codes (or T-Codes) – myEMS portal (online)

ME51N	Create a PReq (requisition for contract)
ME52N	Change a PReq
ME53N	Display a PReq
ME5A	List Display - PReqs
ME5R	List Display – Archived Purchase Requisitions
ME5K	List Display – PReqs by Account Assignment
ME5J	List Display – PReqs by Project
MIGO	Goods Receipt
ML81N	Creating a Service Entry Sheet

Important Terminology Changes

CMS Terminology	myEMS (SAP) Terminology
Contract	Purchase Order (or PO)
Requisition	PReq (or Purchase Requisition)
Financial Coding	Account Assignment
Responsibility Center (RC)	Fund Center (FC) or Cost Center (CC)
Line Object	GL Account (GL is General Ledger)

Frequently Asked Questions for myEMS (SAP)

Purchase Requisitions (PReqs) and Acquisition Card Purchases

These FAQs are organized by the following subject area:

- A. [Contracting or Purchasing Questions](#)
- B. [Acquisition Card Questions](#)
- C. [myEMS \(SAP\) Questions](#)
- D. [Training Questions](#)
- E. [Where to Get Help Questions](#)
- F. [Additional FAQ Being Created](#)

A. CONTRACTING OR PURCHASING PROCESS QUESTIONS

1. What is the procurement process in myEMS (SAP)?

The procurement process involves 5 key steps:

- Managers plan and define what they need, for example having staff write a statement of work
- Managers or their delegate complete a requisition (called PReq) in myEMS portal
- Managers approve s32 in myEMS portal (through their Universal Worklist)
- Procurement complete the tendering process and award the contract, send a copy of the signed contract to the manager
- Managers manage the contract with the support of their staff (including s34 approval on payments which is also done through the myEMS portal Universal Worklist)

For detailed information on the contracting process, please review the information available on the [How Do I Buy page on iService](#).

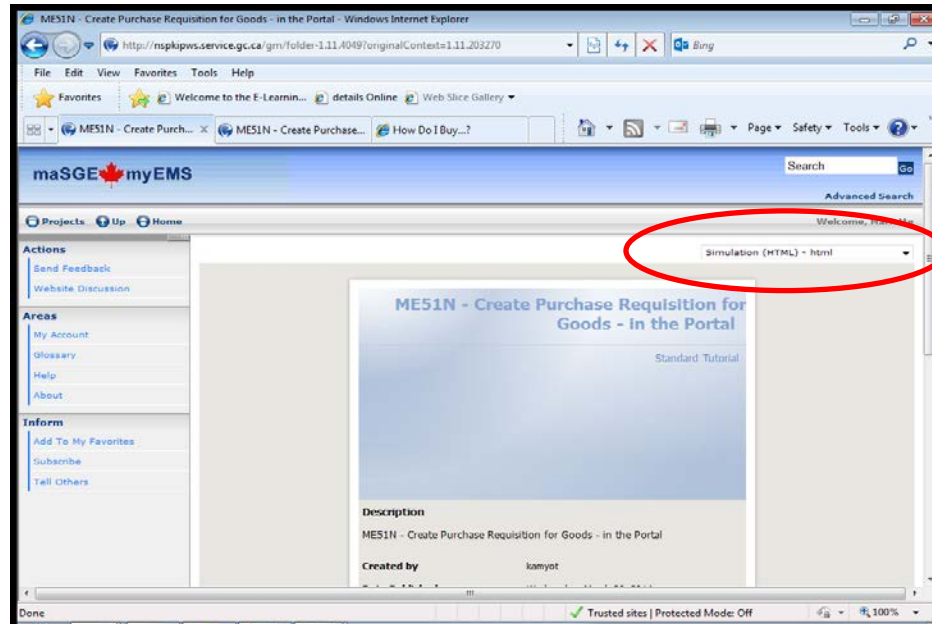
2. How do I send a requisition for a contract in myEMS (SAP)?

- To enter and send a requisition, you must have access to myEMS. For info on how to get [access](#), review the FAQ on that subject.
- Once you have access, review the step-by-step instructions attached to Procurement Bulletin 2014-3 or review the next question.

3. Where can I get more information on how to do a requisition (PReq)?

- The myEMS (SAP) team provides [information on iService](#) simulating the process of entering a requisition. For information on entering requisitions, click on 01_All myEMS (SAP) Portal Related Documentation, then on Materials Management, then on Requisitioner and on the applicable documentation you want.
- There is also [training reference material](#) on the same site. For training reference materials on requisitions, click on eLearning Courses, then Materials Management, then MM02e – Manage Purchase Requisition, then on the title of the training documentation you want. Once opened, click on Standard Tutorial on the front page.

- We suggest that you NOT print the documents as these documents are updated and improved, and because using the online version is more environmentally friendly. However, if you absolutely need to print, click drop-down arrow top right (see screen shot below) and click on either Work Instructions – xml or Work Instructions – pdf, then print the document.



4. What happens after I enter my requisition (PReq)?

- After you enter and save the PReq, it is routed automatically to the person with s32 authority of the fund center you entered.
- If you have multiple fund centers in one PReq (previously called shared coding), it is routed to the manager with s32 authority for each fund center.
- Once that approval (or release) is done by the manager(s), it is routed automatically to Procurement & Contracting (P&C) where it is allocated (or assigned) to a procurement officer to complete the contracting. Where multiple fund centers are involved, P&C cannot initiate the contracting process until all managers have approved.

5. Why is my Manager seeing the same request multiple times in his list of Activity?

- Applications may involve multiple lines of coding. There should be at least one line of coding for each fiscal year and each GL account. If the request involves several cost centers, there should be a line for the coding for each cost center.
- Managers must approve each line of coding. So, to approve an entire application, they must approve all lines of coding. This gives them the chance to approve only one or more sections of the application.

6. How do I request an amendment to a contract?

- To request a financial amendment, you need to amend your PReq. Once it is amended and saved, it will follow the same process as when you first entered it, to the Cost Center manager for approval then on to Procurement and Contracting.

7. How do I check the status of my requisition (PReq)?

- Follow the step-by-step instructions attached to Procurement Bulletin 2014-3.

8. How can I get a list of the contracts (POs) for my manager?

- The myEMS (SAP) team is working on developing reports for managers and their delegates. This is one of the reports being created. We will advise you through iService when it is available.

9. Who do I contact if I have a problem with a requisition?

- If you are having problems entering a requisition, please put a ticket in through [Report an Incident](#) on the myEMS portal (see FAQ on reporting an incident in a later section).
- Regions and some branches in NHQ and have identified guides for PReqs and AC. These guides can help you if you are having problems. The names of the regional guides are provided in Procurement Notice 2014-3. Please do not call the guides for other regions as they are not aware of any processes specific to your region or branch. Note also that these guides cannot provide any help regarding tickets you put in, access, or problems with training. Those issues must be addressed through Report an Incident on myEMS portal.

10. Who do I contact if I have questions about my contract (PO)?

- If your requisition has been approved by your manager, or if the contract (PO) is already in place, contact the procurement specialist assigned to your file.
- To find out who is assigned to your file, follow the procedures in the How To section of the procurement [Tools and Templates for Admin Professionals and Managers](#) page on iService.

11. How do I find a list of vendors?

- Please see the instructions attached to Procurement Notice 2014-3.

12. How do I receive goods or services?

- You need to receive goods or services in order for payments to be made on contracts for goods or services.
- The myEMS (SAP) team provides [information on iService](#) simulating the process of receiving a good or services in myEMS. For information on receiving a good or


services, click on 01_All myEMS (SAP) Portal Related Documentation, then on Materials Management, then on Receiver and on the applicable documentation you want.

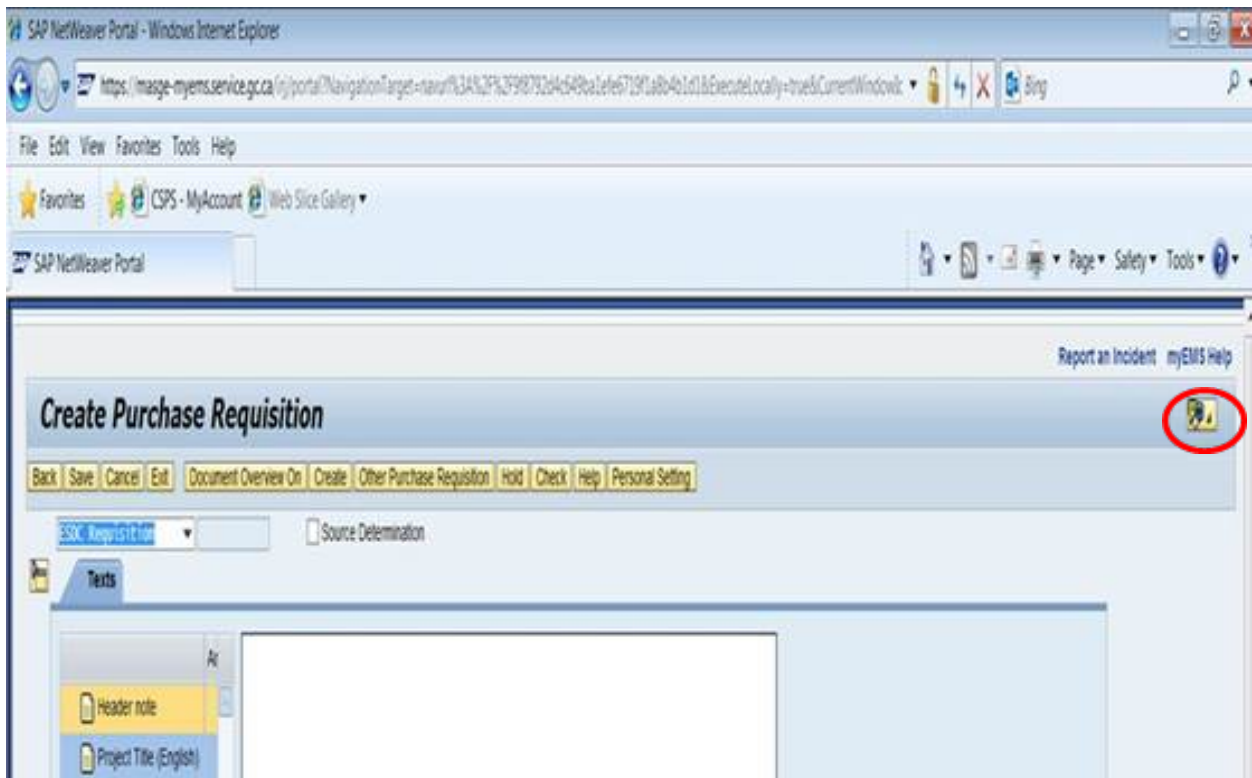
- Do not enter “D” in Column I (Item Category) of requisition (Preq) in myEMS. By leaving this column blank, the system will not require a service entry sheet to be completed. To be clear, you will still be using GL accounts for services; however, you will be required to do a goods receipt (rather than a service entry sheet) when the services are rendered.
- Transaction code for goods receipt is MIGO.

13. There is only 1 delivery address for my region in myEMS and this is creating inaccurate tax information. What do I do to correct the tax?

- For goods, follow the instructions at steps 21 & 22 of the Create Purchase Requisition for Goods in the Portal
- For services, follow the instructions at steps 37, 38 and 47 of the myEMS documentation Create Purchase Requisition for Services in the Portal
- The Consignee code determines the delivery address which, in turn, determines taxation. In SAP, this is a field called Vendor (where you can choose from a drop-down list) but in this case, it does not mean the vendor who will deliver the goods or services, but rather where the vendor is to deliver the goods or services, in other words the delivery address.

14. How do I attach a statement of work (or other document) to the preq I am sending?

1. Click the Services for Object button  at the top right of the screen (in the portal) – see screen shot below
2. Choose Create then Create Attachment
3. For the first time you do this ONLY, the system will take you through some prompts to enable the functionality. Follow these system prompts. If you encounter a problem or error with this process, Report an Incident to myEMS
4. Click the correct folder and sub-folders until you find the document you want to attach and double-click on it. A pop-up box will appear, click Allow. You will get a message at the bottom of your screen indicating your attachment was “created”.



15. I received all goods in myEMS but in fact only received partial delivery. How do I correct the goods receipt in myEMS?

- In this case, you would need to reverse your goods receipt by following the steps in the myEMS documentation [Reverse Goods Receipt Portal](#)
- Note however, that depending on how far along in the procure-to-pay process you are, you may need to ask your procurement officer to change the contract (PO)
- If no payment has been done using the goods receipt, you will be able to simply reverse the goods receipt, then receive the correct amount.
- If payments have already been done using that goods receipt, you will need to ask your procurement officer to change the contract (PO) in order to be able to correct the goods receipt and make further payments.
- Note that partial invoices should only consume part of the goods receipt on a PO (refer to [Procurement Instructions](#) on partial invoices for more information on this occurrence).

16. How do I copy a line(s) from a previous preq into a new one to avoid having to re-enter the information?

- For goods, follow the instructions at step 7 of the documentation the [Create Purchase Requisition for Goods in the Portal](#)
- For services, follow the instructions at step 8 of the documentation [Create Purchase Requisition for Services in the Portal](#)

B. ACQUISITION CARD QUESTIONS

1. If I request an acquisition card, what training do I need?

- First, you must take the Acquisition Card training available online through the Service Canada College. This training explains roles and responsibilities, the process and the policies and rules you must follow. If you have any issues or problems with this training, contact the [NC-PURCHASING PORTAL- PORTAIL_D'ACHATS-GD](#).
- You must also take the following myEMS training – all online – to get access so you can enter card documents and prepare your monthly log:
 - [SAP01e - Introduction to my EMS \(SAP\)](#)
 - [SAP02e - myEMS \(SAP\) Basic Navigation](#)
 - [AC01e - Acquisition Card Business Process Overview](#)
 - [AC03e - Process Card Documents](#)
 - [AC04e - Execute Credit Card Reports](#)
- For online training, you must subscribe to the courses mentioned above by clicking the link “subscribe” on the left side of the screen.
- For online training, you must complete the assessment (test) at the end of the training to get access to myEMS. You must see the results of your assessment for it to be considered completed.
- Any problems or issues related to the myEMS training including registration, please put a ticket in through [Report an Incident](#) on the myEMS portal.
- No acquisition card application is processed until all the training is completed and you have received your login ID, password and access to the AC module of myEMS.

2. Where in the portal do I enter a card document?

- You do not enter card documents in the portal. You must enter them in the GUI (desktop application).

3. How do I enter a card document?

- To enter a card document, you must have access to myEMS (SAP). For info on how to get access, review the FAQ on that subject.
- Once you have access, review the step-by-step instructions attached to Procurement Bulletin 2014-3. Alternately, myEMS provides detailed instructions (see question 6 further in this section).

4. When do I enter the card document?

- You enter the card document as soon as you have completed your purchase and you have the authorization number.
- If you completed your purchase in person, the authorization number will be on the cashier receipt you were given by the store at time of purchase.

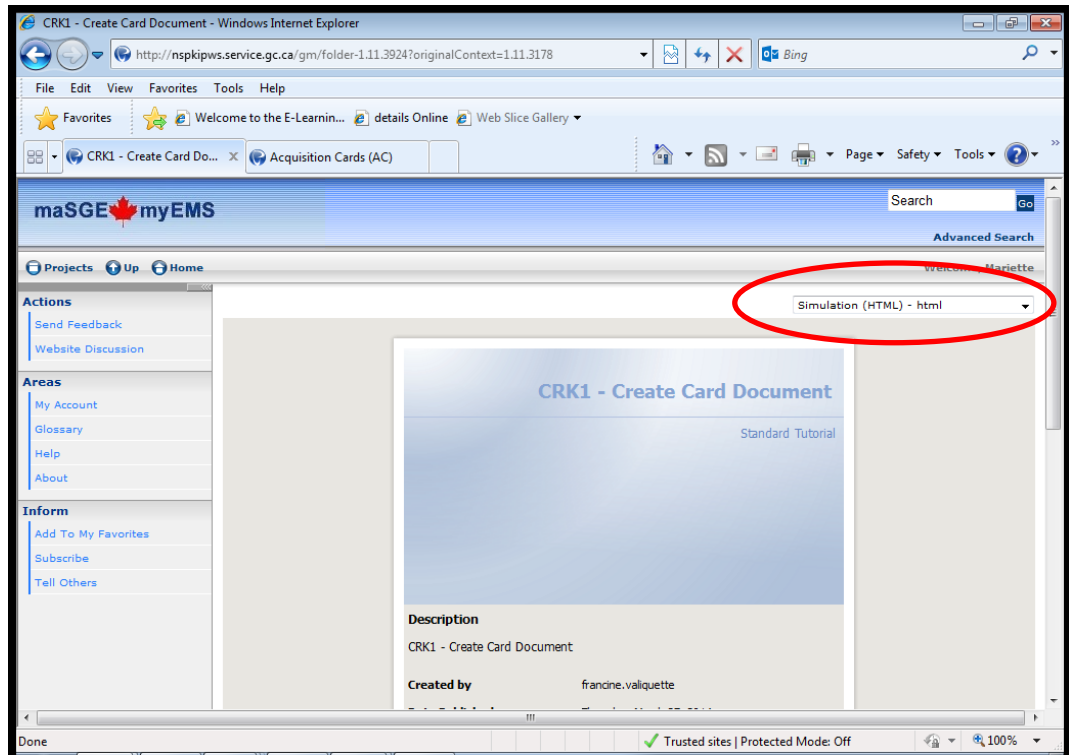
- If you completed your purchase over the phone or online, the authorization number should be on the invoice sent to you.
- No matter how you complete your purchase, we recommend that you do not wait to enter the card document, but to enter it as soon as you have completed the purchase. If you do not have an authorization number at that time, you can obtain it from your BMO account online (it may take a day or so after your purchase for the amount to be posted there).
- DO NOT WAIT for the goods or services to be received before you enter your card document as the transaction can be on a statement before you actually receive the goods and services.

5. Should I enter earmarked funds (previously called manual commitment) to set aside the budget before I make my purchase?

- No. This is a change in the process. Manual commitments were required in CMS, but when you enter the card document, you are entering the commitment. If you also entered a manual commitment, you will, in fact, have committed the amount twice in your manager's budget.
- Earmarked funds are only to be used for very specific purposes. For more information, read the [information on iService](#)

6. Where can I get more information on how to enter a card document or how to do a monthly log?

- The myEMS (SAP) team provides [information on iService](#) simulating the process of entering a requisition. For information on entering requisitions, click on 02_All myEMS (SAP) Desktop Application Related Documentation, then on Acquisition Cars, then on the applicable documentation you want.
- There is also [training reference material](#) on the same site. For training reference materials on card documents, click on eLearning Courses, then Acquisition Cards, then AC03e – Process Card Documents, then on the title of the training documentation you want. Once opened, click on Standard Tutorial on the front page.
- We suggest that you NOT print the documents as these documents are updated and improved, and because using the online version is more environmentally friendly. However, if you absolutely need to print, click drop-down arrow top right (see screen shot below) and click on either Work Instructions – xml or Work Instructions – pdf, then print the document.



7. Who do I contact if I have a problem with a card document?

- You can report any problem or issue with myEMS through [Report an Incident](#) on the portal (see FAQ on reporting an incident in a later section).
- Regions and some branches in NHQ and have identified guides for PReqs and AC. These guides can help you if you are having problems. The names of the regional guides are provided in Procurement Notice 2014-3. Please do not call the guides for other regions as they are not aware of any processes specific to your region or branch. Note also that these guides cannot provide any help regarding tickets you put in, access, or problems with training. Those issues must be addressed through [Report an Incident](#) on myEMS portal.

8. Who do I contact if I have a problem with my monthly log?

- You can report any problem or issue with myEMS through [Report an Incident](#) on the portal.
- For questions that are not related to myEMS, please visit the [Accounting Operations Service Catalogue](#) on iService.

9. Can I still pay contract invoices with my acquisition card?

- No. Unfortunately, myEMS does not permit the payment of invoices with the acquisition card when there is a contract (PO) put in place by P&C and entered as a contract (PO) in myEMS.
- You can only pay a contract with an acquisition card if:

- Your manager signed a room rental or hospitality contract (i.e. agreement under the limit of your card) or you have an invoice but no contract
- You did not send a requisition to P&C to put a formal ESDC contract in place
- It is not entered as a contract (PO) in myEMS.
- All such expenditures must be within the limits (transaction and monthly) of your card and must be permitted by the Government of Canada and ESDC Acquisition Card policies.
- If you want to complete a purchase with your acquisition card, please make sure the vendor will accept the card for the total amount as you will have to send a PReq to complete a confirming order (previously called an Inappropriately Initiated Procurement (IIP)) if you make a purchase but cannot use your card.

10. How do I remove the asset information in the card document if I made a mistake?

- Once a card document is saved, you cannot modify it to remove the tracked asset information.
- As soon as you save a card document, any asset tracking information you entered is automatically sent through workflow to the Materiel Management group for your region. They will determine whether the asset needs an asset tag or not.

C. myEMS (SAP) QUESTIONS

1. What is the difference between the GUI and the portal?

- Generally, the GUI is for CFOB practitioners, but there are certain activities where the GUI must be used by ESDC employees outside CFOB, for example, entering card documents or preparing monthly logs for acquisition cardholders.
- The portal is used for a wide range of services such as Reporting an Incident, entering a requisition, manager approval s32 or s34 or requesting the creation of new vendors.
- The GUI on your desktop looks like:



2. How can I get access to work in myEMS (SAP)?

- To get access to myEMS portal or GUI, you must complete the training associated with the tasks you have to perform.
- For more information on myEMS and training, visit the [Training Roadmap](#) site. It provides a roadmap with step-by-step instructions on the curriculum and how to complete the training.

3. How do I report a problem or issue with myEMS?

- Problems or issues with myEMS are to be reported through a ticket entered on the Report an Incident button on the [myEMS portal](#).
- Additional information is provided on the [myEMS Instructions](#) iService page.

D. TRAINING QUESTIONS

1. Where can I get training for myEMS?

- For more information on curriculum (which training you need) and the steps to get the training, visit the [myEMS iService Training](#) page.

2. What training do I need to enter a requisition?

- You will need to take the following courses:
 - a. [SAP01e - Introduction to my EMS \(SAP\)](#)
 - b. [SAP02e - myEMS \(SAP\) Basic Navigation](#)
 - c. [MM01e - Material Management Business Process Overview](#)
 - d. [MM02 - Manage Purchase Requisition](#)
 - e. [MM05e - Manage Deliverables](#)
- For online training, you must subscribe to the courses mentioned above by clicking the link “subscribe” on the left side of the screen.
- For online training, you must complete the assessment (test) at the end of the training to get access to myEMS. You must see the results of your assessment for it to be considered completed.
- You will likely need to also do goods or services receipt (now mandatory before payment can be issued). If so, you will also need to take MM05 – Manage Deliverables.

3. If I request an acquisition card, what training do I need?

- First, you must take the Acquisition Card training available online through the Service Canada College. This training explains roles and responsibilities, the process and the policies and rules you must follow. If you have any issues or problems with this training, contact the [NC-PURCHASING PORTAL- PORTAIL D'ACHATS-GD](#).
- You must also take the following myEMS training – all online – to get access so you can enter card documents and prepare your monthly log:
 - a. [SAP01e - Introduction to my EMS \(SAP\)](#)
 - b. [SAP02e - myEMS \(SAP\) Basic Navigation](#)
 - c. [AC01e - Acquisition Card Business Process Overview](#)
 - d. [AC03e - Process Card Documents](#)
 - e. [AC04e - Execute Credit Card Reports](#)
- For online training, you must subscribe to the courses mentioned above by clicking the link “subscribe” on the left side of the screen.

- For online training, you must complete the assessment (test) at the end of the training to get access to myEMS. You must see the results of your assessment for it to be considered completed.
- Any problems or issues related to the myEMS training including registration should be reported through a ticket entered on the Report an Incident button on the [myEMS portal](#).
- No acquisition card application is processed until all the training is completed and you have received your login ID, password and access to the AC module of myEMS.

4. Who do I contact if I have a problem with training?

- Any problems or issues related to the training including registration should be reported through a ticket entered on the Report an Incident button on the [myEMS portal](#).

E. WHERE TO GET HELP QUESTIONS

1. Where do I report a problem with myEMS (SAP)?

- Problems or issues with myEMS, including access, training, problems entering requisitions or card documents must be reported through a ticket entered on the Report an Incident button on the [myEMS portal](#).
- Additional information is provided on the [myEMS Instructions](#) iService page.

2. Who do I contact if I have questions about my contract (PO)?

- If your requisition has been approved by your manager, or if the contract (PO) is already in place, contact the procurement specialist assigned to your file.
- To find out who is assigned to your file, follow the procedures in the How To section of the procurement [Tools and Templates](#) page on iService.

F. ADDITIONAL FAQs BEING CREATED

We are working with the myEMS (SAP) team to develop answers related to the following questions:

- How do I know who the requisition went to for s32 approval?

Once this additional FAQ is completed, we will update this document on the [Procurement page of iService](#).

Finance Questions

For financial questions such as payment of invoice, acquisition card log, interdepartmental agreement and manual commitment please refer to:

Accounting Operations Services Catalogue

[Accounting Operations Service Catalogue](#)

<http://iservice.prv/eng/finance/card/ao/catalogue.shtml>