McKesson Strategic Supply Sourcing™
Requisition Management

Quick Reference Job aid

Basics

Sign in

1. Launch your McKesson Strategic Supply Sourcing link.
2. Result: The Sign in window appears.
3. Enter your Email Address and Password.
4. Click Sign in.
5. Result: The home page appears.

Sign out

1. Click Sign Out in the upper right hand corner of the application.

Note: The system times out after the designated inactivity time expires. Simply sign back into the system.

Creating Requisitions

Create a basic requisition

1. From the homepage, click New Requisition.
   Result: The Requisition Header Information page displays.
2. Complete the Requisition Header.
   a. The Requisition Number is system assigned starting with MSSS and follows by a sequence of numbers.
   b. The Requisition Name field defaults to the requisition number. You can edit this field.
   c. Verify the Deliver To, Corporation and Cost Center values. If necessary, use the Search icon to modify the data.
3. Click Save.
4. Select an item search method (My favorites, Preferred items, VIM, The Matrix, Organization Item ID, or Punch out)
5. Click on the item's image and then drag and drop it into the shopping cart.

   Hint: To hide the shopping cart and allow you to view more of the screen, click the cart's Minimize icon.
   To display the cart, click the Requisition Cart button.
   

6. Select more items to add to the cart. (optional)
7. Click Checkout.
8. Verify item information. Modify data as needed.
9. Click Submit and confirm the submit message.

Drag and drop feature

The drag and drop feature requires the following mouse movements:

1. Click the item's image.
2. Hold down the left mouse button and drag the image to the cart by moving the mouse.
3. Release the mouse button. Result: The item drops into the cart.

Hint: Use the page buttons to move between pages. See page 4.

Common Icons and Buttons

Icon/Button	Function
	Inventory item
	Item on active contract
	Item with spend
	Preferred item
	Formulary indicator (1, 2, 3 or 4) *See Formulary Level definitions below*
	Item on favorite list
	Click the Search icon to find items.
	View/add comment to a requisition
	View/add attachment
	Cost savings opportunity indicator
	Report a problem
Filter	Filter information to narrow results
Export	Export item information to another system
VIM View	Change your VIM View
Settings	Modify view settings

Formulary Levels

Level	Function
1	Preferred item and/or inventory item
2	Items on contract with spend
3	Items on contract without spend
4	Items not in inventory location, not marked as preferred, & not on contract

Adding Items to a Requisition

Add an item from your favorite list

1. Follow *Create a basic requisition* steps 1-3.
2. Click the My Favorites icon.
3. Click a list from the My Favorite Lists panel.
4. Select item(s) and drag & drop it into the cart or click the cart under Action to add all list items to the shopping cart.
5. Continue with *Create a basic requisition* steps 6-9.

Hint: If you selected another method to add items to your requisition and now you want to add items from the VIM, then do the following: Click **Content Management** on the toolbar and then click **VIM**.

Add an item from the VIM

1. Follow *Create a basic requisition* steps 1-3.
2. Click the VIM icon.
3. Search for an item by using the Description field. (Reference *Search for an item* directions.)
4. Click the image and drag & drop it into the cart.
5. Continue with *Create a basic requisition* steps 6-9.

Hint: The VIM view default is abbreviated item description in detail view. To change the view, click the **VIM View** button and then select **Full Item Description** or **Spreadsheet View**.

Add an item using Organization Item ID

1. Follow *Create a basic requisition* steps 1-3.

In the Add Item by searching Organization Item ID

2. In Add Item by searching Organization Item ID enter the Organization Item ID
3. Click the Search icon.
   Result: A list of item's matching your criteria displays.
4. Click the item.
5. Select more items. (optional)
6. Verify item information. Modify data as needed.
7. Click Submit and confirm the submit message.

Common Requisition Icons/Buttons

Icon/button	Function
New	Create a new requisition from the Requisition List
	Edit requisition
	Click to search for data such as General Ledger Number
	The item has a problem. Click icon to see details.
	Edit price
	Drag and drop to Shopping cart
Submit	Click Submit to process order
	Save Requisition As option Create new requisition from existing requisition
	View requisition history
	View approval path
Delete	Delete a un-submitted requisition

Modifying a Requisition

View a requisition

1. Select Requisition Management from the homepage.
2. View your Requisition List.
3. Scroll through the list or use the Search field to locate your requisition.
4. Click the appropriate requisition number.
5. View the item's on the Item List tab.
6. View the approvals on the Approval Path tab.

- For open requisitions, you can modify the quantity, price, or G/L. Click the field, make your changes and then save.
- Click Comments and/or Attachments to add these elements to your requisition.

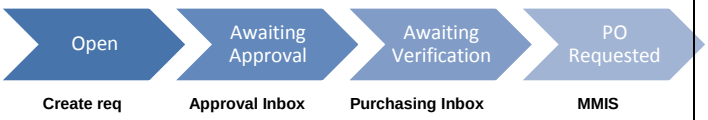
Delete a requisition

To delete a requisition that has not been submitted yet:

1. From the Requisition List, select the requisition checkbox.
2. Click the Delete button.
3. Confirm the delete requisition message; click Yes.
   Result: The requisition is removed.

McKesson Strategic Supply Sourcing™

A typical requisition moves through the system passing through the following status changes:



Statuses at the requisition level

Requisition Status	
Status	**Meaning**
Awaiting Approval	Requires approval review and

	action
Awaiting Verification	The requisition has been approved by the requisition approvers but it is waiting for a buyer to verify the request so it can be placed on a PO
Pending Clarification	Requestor needs to provide more information about the requisition in order to process it
PO Requested	The buyer has verified the requisition and it has been sent to the MMIS system awaiting PO
Open	Requisition has not been submitted
Rejected	Requisition was not approved and rejected from moving forward

Requisition line statuses

Requisition line statuses sent from the MMIS (*requisition inbound interface*)

Requisition Line Status	
Line Status	**Meaning**
Approved	Line has been approved
Auto PO	Line is ready to be added to an automatic purchase order
Backordered	Line backordered due to insufficient quantity available in the supply location
Complete	Item has been received
Delivery	Able to query by delivery but returns open stock order items
Denied/Removed	Line denied by an approver
Draft	Line saved but not submitted
Header Validation Failed	Line item was not validated because the header failed validation
Inactive GL	Line has inactive GL account
Inactive Supply Location	Line has item in an inactive supply location

Line Status	Meaning
Interface Sent	Line exported to a third-party system via the Requisitions Outbound Interface
Invalid GL	Line has an invalid GL Expense Account or SubAccount
Invalid Inter-Company Transfer	Line has an inter-company error
Invalid Packaging	Line saved with invalid packaging data
Invalid Par Quantity	Line has invalid par quantity
Invalid Supply Location	Line has an invalid supply location
Invalid UM	Line has an invalid Unit of Measure
Invalid UM and Neg Qty	Line has invalid Unit of Measure and negative quantity
Killed	Cannot fill line because the supply location does not have enough of the item on-hand and does not track backorders. Undelivered quantities are canceled
Non-Cat with Invalid Price	Line has a non-catalog item with an invalid price
Non-Cat with invalid/missing description	Line has a non-catalog item and the description is either missing or invalid
Non-Cat with Zero Qty	Line has a non-catalog item with zero quantity
Non-Cat with Neg Qty	Line has a non-catalog item with negative quantity (no returns on non-catalog items)
On Order	Line placed on a purchase order
Open	Line submitted but not issued
Open Stock Order	Line routed to a supply location for picking
Passed Validation	Line item passed validation but at least one other line on the requisition did not pass validation

Line Status	Meaning
Pat Committed	Line submitted with a patient associated and is awaiting processing by the supply location
Pending Allocation Approval	Item has at least one line waiting for allocation approval
Pending Approval	Line submitted and requires approval based on dollar amount
Pending Bid	Line placed on a bid request and is waiting to be awarded
Pending Commodity	Line submitted and requires approval based on commodity code
Pending Information	Line is pending information approval
Pending Interface	Item to be exported to a third-party system via the Requisitions Outbound Interface
Pending PO	Item routed to Purchasing to be put on a purchase order
Pending Stock Order	Line submitted to the supply location pending its order day
Process Pending Killed	Line killed by process pending because of zero on-hands
Stock Return	Returns completed items
Stockless	Line submitted as a stockless item and sent to the vendor using Auto PO function
Unknown Error	Line has unknown error
Zero Quantity Item	Line has zero quantity

The following table displays the requisition line statuses that appear in MSSS:

Status	Definition
Open	Status of an item line during creation and after approval. If item line status remains Open after item is sent to issuing, it means the item line has not been processed yet.
Filled	Quantity for stock and non-stock items is completely filled. The Issue Qty field displays the issue value.
Canceled	Line item canceled at some point during processing.
Backordered	Status of a stock item when the requested quantity drops the on-hand quantity of the supply location below acceptable minimum levels.
Pick list	Status of a stock item when a picklist has been generated at the supply location.
Pick list from backorder	Status of a stock item when a picklist has been generated from backorder maintenance.
On system PO	Status of a requisitioned item line pulled on to a submitted PO.
On manual PO	Status of an item line on a PO that is not linked to a requisition.

Paging through lists

Use the page buttons to move through pages of information.