Miami-Dade County

informs

End User Training Resource Guide

Course Code: SCM 201
Course Title: Manage and Record Requisitions

Updated 05-08-2025

Revision History

Person	Date	Version	Description of Change
Matthew Duke	02/13/2020	1.0	Initial Draft
Suneel Mudaliar	03/02/2020	2.1	Revision History added
Griffin Caligiuri	01/21/2021	2.2	Content Revised
Karla Schindelmaiser	11/25/2024	3.0	Updates to reflect changes to TOC and New Key Terms table color

Guide Overview

Guide Description

This guide provides a comprehensive review of the Manage and Record Requisitions processes.

This guide consists of the following modules:

- Module 1: Course Introduction
- Module 2: Manage and Record Requisitions
- Module 3: Managing Requisitions
- Module 4: Course Summary

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Module 1: Introduction

Topics

This module covers the following topics:

- Learning Objectives
- Roles and Responsibilities
- Navigation
- Purpose and Benefits
- The End-to-End Business Process

Module 1: Introduction

Learning Objectives

At the conclusion of this guide, participants will be able to:

- Understanding of the procure-to-pay process
- Understand the lifecycle of a requisition
- Understand the components of a requisition
- Create a requisition
- Manage a requisition
- Navigate the requisitions approval process

Module 1: Introduction

Audience:

Roles and Responsibilities

The following roles are associated with this topic and will play a part in conducting the related business processes for the County:

- **Department Buyer:** The Department Buyer has the ability to create and update Purchase Orders (PO), Change Orders - enter PO or source a PO from requisition, or change orders and dispatch.
- **Department Requisition Processor**: The Department Requisition Processor is a department end-user who has the delegated authority to create, change, and cancel a requisition.
- **Department PO Processor:** The Department PO Processor has the ability to create and update Purchase orders prior to final PO approval.

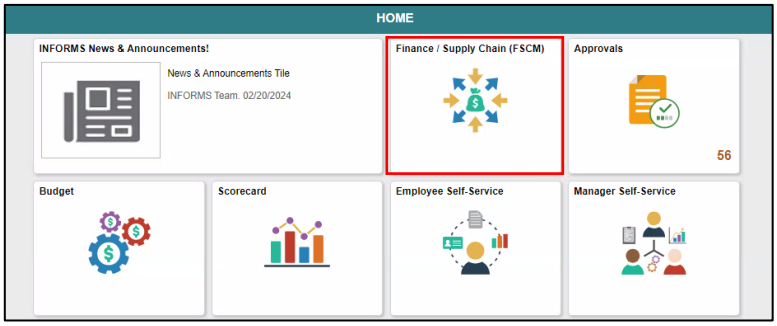
Module 1: Introduction

Navigation

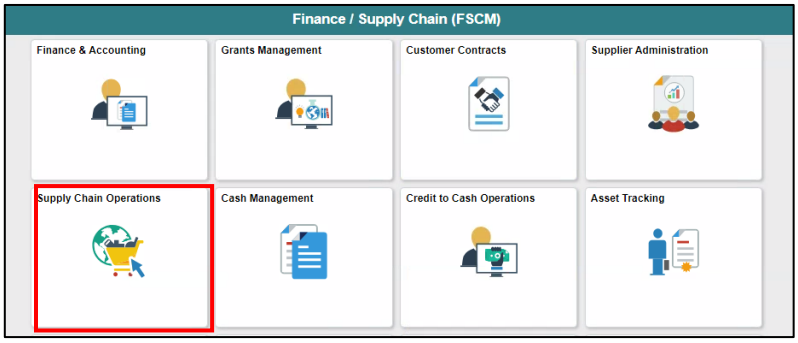
Below are the steps to navigate to Manage and Record Requisitions, which will be used for navigation in the rest of this guide:

Navigate to **Finance/Supply Chain (FSCM) tile > Supply Chain Operations tile > eProcurement tile > Create Requisition tile**

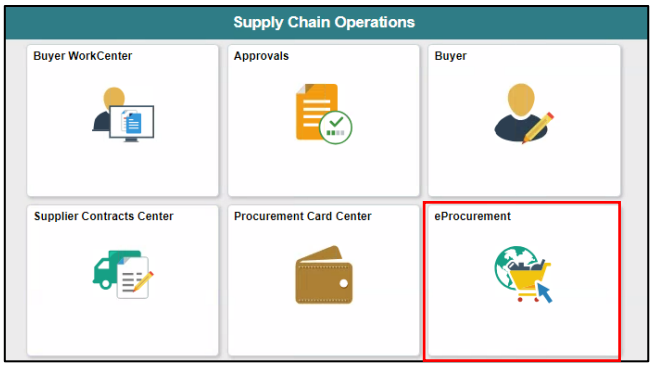
1. Login into **INFORMS** and select the **FINANCE/SUPPLY CHAIN (FSCM)** tile.



2. Select the **Supply Chain Operations** tile.



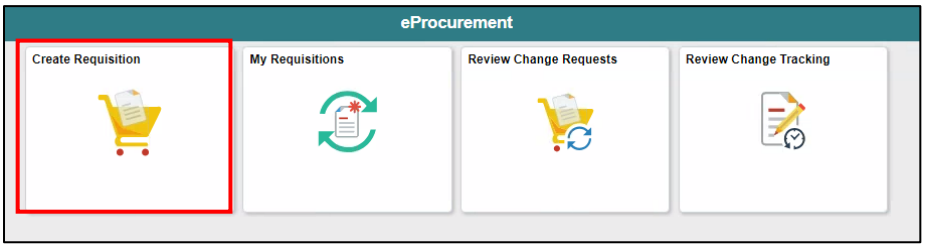
3. Select the **eProcurement** tile from the Supply Chain Operations page.



Module 1: Introduction

Navigation

4. Select the **Create Requisition** tile from the eProcurement page.



5.

Module 1: Introduction

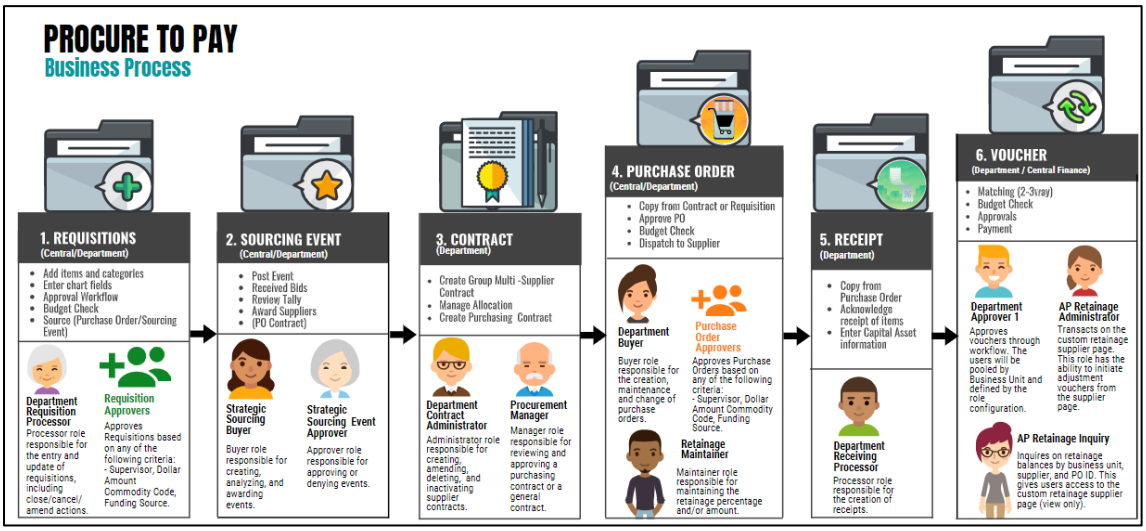
Purpose and Benefits

The key changes to the Manage and Record Requisition business process include:

- One system of recording requisitions
- Requisitions can be sourced to a purchase order or sourcing event.
- The adoption of the National Institute of Government Purchasing (NIGP) item and category taxonomy.
  - Item Categories (5 Digits)
  - Items (7 or 11 Digits)
- Standard requisition workflow
  - Dollar Thresholds
  - Item Categories
  - ChartField Values
- Web Suppliers
  - Office Depot
  - Grainger

Module 1: Introduction

The End-to-End Business Process



The INFORMS procure-to-pay process consists of the following high-level steps. **Note:** There are additional steps not included below that will be addressed in other training material (e.g., Items, Suppliers):

- **Requisitions**
  - Header Defaults
  - Select items and item categories
  - Enter Schedule Information
  - Enter Accounting Information (ChartFields)
  - Submit for Approval
  - Budget Check
  - Source a Requisition
    - Purchase Order
    - Sourcing Event
- **Sourcing Event**
  - Prepare Event
  - Event Approval
  - Post Event
  - Receive Bidder/Supplier Bids
  - Review Tally
  - Award Supplier to a PO Contract or SPO
- **Contract**
  - Create Group Multi-Supplier Contract
  - Manage Department Allocations
  - Manage Bidder Groups
  - Create Purchasing Contract

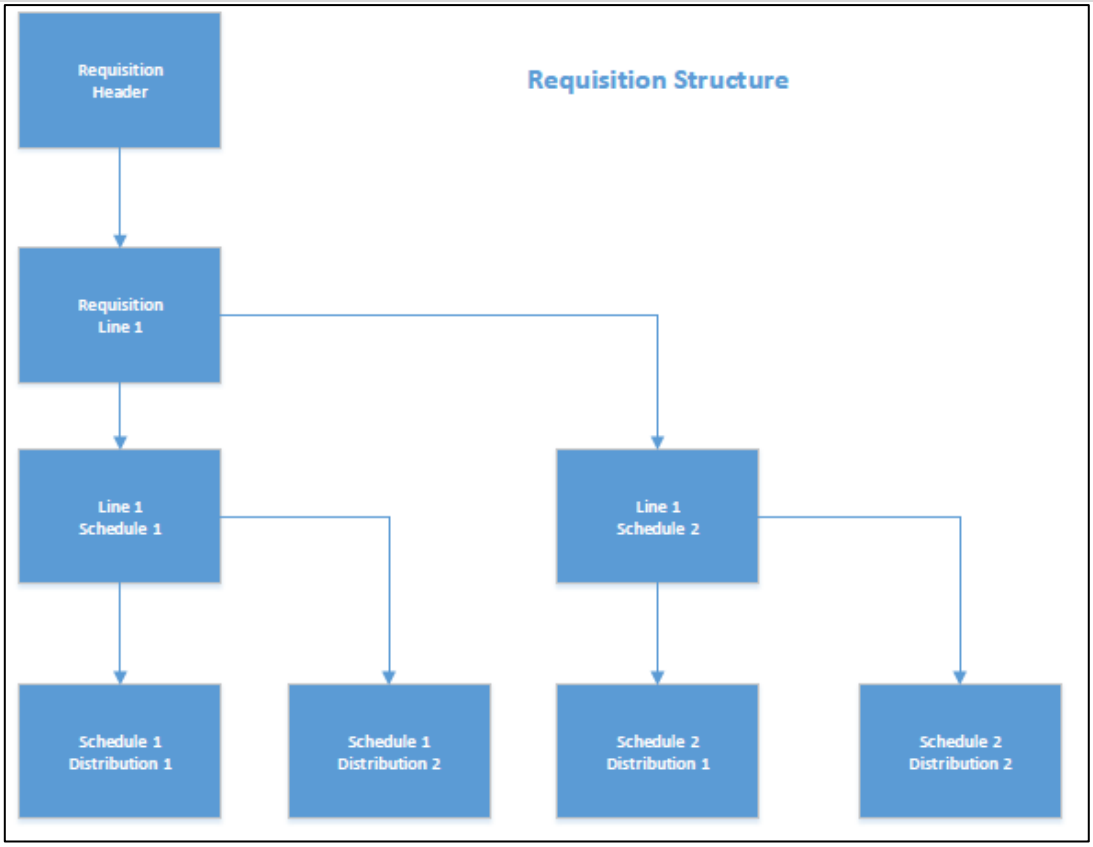
Module 1: Introduction

The End-to-End Business Process

- **Contract (cont.)**
  - Approve Contracts
  - Associate Purchasing Contract to Group Multi-Supplier Contract
- **Purchase Order**
  - Copy from Contract or Requisition
  - Enter or Validate Schedule Information
  - Enter or Validate Accounting Information (ChartFields)
  - Submit for Approval
  - Budget Check
  - Dispatch to Supplier
- **Receipt**
  - Select Purchase Order
  - Select PO Lines
  - Enter Receiving Quantities or Amount
  - Enter Capital Asset Information
  - Save Receipt
- **Voucher**
  - Voucher Entry
  - Document Tolerance Checking
  - Budget Check
  - Matching
  - Voucher Approval
  - Voucher Posting
  - Pay Cycle
  - Payment Post

Module 1: Introduction

The End-to-End Business Process

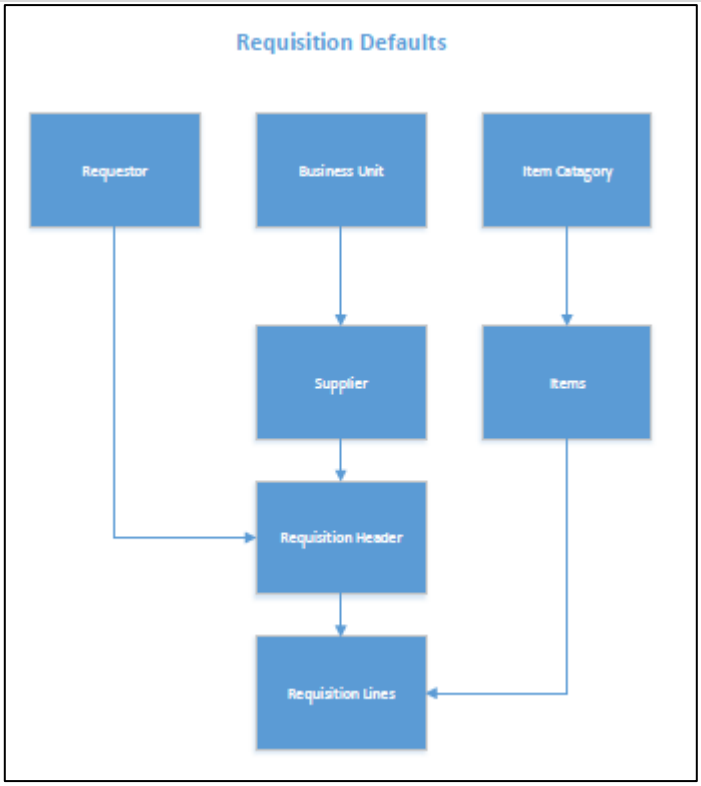


Requisition Structure

A requisition consists of four essential elements: headers, lines, schedules, and distributions. Each requisition has one header, which can have multiple lines. Each line can have multiple schedules, and each schedule can have multiple distributions. The requisition header defines organizational information, requester, and status (e.g., Requester, Date, Origin, Business Unit, Status, Budget Status). The requisition lines details goods or services selected from a catalog or submitted via a special request (e.g., Items, Unit of Measure, Quantity, and Price). The requisition schedule defines when and where the line items delivered are to be placed (e.g., Ship To, Due Date, and Attention To). The requisition distribution defines internal accounting information.

Module 1: Introduction

The End-to-End Business Process



Requisition Defaults

The INFORMS system is highly integrated, and a user experiences its integration and defaults while navigating different layers of a transaction. Default values intend to minimize the amount of data entry required by a user and avoid data entry errors. There are values shared by large groups of users that have been configured at the highest levels (e.g., business unit, item category, requestor). Each layer of a requisition has a set of values that default from a higher level, which must be validated or changed if necessary. It is important to note that if a user changes a lower level value (e.g., Requisition Defaults page), the new value prevails over the higher-level default.

Examples of field defaults include:

- Business Unit – Default from the requester's overall preference.
- Requester – Default from the requester's procurement user preference.
- Currency – Default from the purchasing business unit.
- Location – Default from the requester's procurement user preference.
- Account – Default from the item category.

Module 1: Introduction

Module 1: Introduction Summary

The following key concepts were covered in this module:

- Learning Objectives
- Roles and Responsibilities
- Navigation
- Purpose and Benefits
- The End-to-End Business Process
- Overview of the Procure to Pay Business Process

Module 2: Manage and Record Requisitions

Module 2: Course Introduction Summary

This module includes the following lessons:

- Lesson 1 – Create a Requisition

Lesson 1: Create a Requisition

Lesson 1: Overview

At the conclusion of this lesson, you will be able to:

- Select an Item
- Create a Special Request

Lesson 1 Create a Requisition

Lesson 1: Introduction

<Insert the Visio Diagram of the related Sub-Process.>

<If this requires additional pages, remember to insert two pages in this document for each page to be displayed in the participants' Training Guide. On the leading page—typically the Instructor Notes page—insert the statement: (Intentionally left blank)>

Lesson 1: Create a Requisition

Key Terms

The following key terms are used in this lesson:

Term	Definition
Attention To	The person to whom the goods/services are to be delivered.
Business Unit	Business Units are defined for each entity and used to maintain and report on transactional data.
Catalog	Displays all active NIGP items that can be selected to add to a requisition.
Category	Classifies asset by type for accounting entry and reporting.
ChartField	A term to represent the chart of accounts. Sometimes the term is used by the INFORMS team to reference a specific field within the chart of accounts (i.e., Fund, Account, Dept ID).
Checkout Page	Tthe last step before submitting the requisition for approval.
Distribution Page	The Distribution Page is the fourth layer of a requisition used to enter accounting information (ChartFields).
Due Date	The date the requester anticipates the receipt of the goods or service.
eProcurement	Tthe purchasing module that provides several ways for sourcing items to a requisition.
Express Item Entry	A requisition method that allows requisitioners to quickly add items to a requisition using a streamlined online template.
Favorites	A user's personal list of navigation shortcuts.

Lesson 1: Create a Requisition

Key Terms

The following key terms are used in this lesson:

Term	Definition
Fund Code	The primary structural units of Education and Government accounting. ChartFields are self-balancing due to Fund Codes capturing sources of revenue/expenses.
Item Catalog	Facilitates selection of goods and services maintained in the Item Master table from a catalog during the creation of a requisition.
Item ID	The unique system identifier for an item.
Items Detail Page	The Items Detail Page displays ~~the~~ item descriptions, negotiated prices~~,~~ and availability for all items that meet the selected item category.
Line Details Page	The Line Details Page is used to verify and edit additional details for a line.
Manufacturer Item ID	Displays the EAMS Manufacturer ID. This field is required for EAMS and INFORMS integration.
National Institute of Government Purchasing (NIGP) Code	A standard taxonomy for classifying goods and services which allows for conducting in-depth analysis of spending to inform sourcing strategies and improve buying efficiency.
Product Details Page	The Product Details Page provides item attributes such as the product description and specifications.
Punchout	The process of leaving a requisition to access the County catalog to pull items into a requisition for processing and sourcing to a purchase order.
Requestor	A user that needs to procure goods or services.
Fund Code	The primary structural units of Education and Government accounting. ChartFields are self-balancing due to Fund Codes capturing sources of revenue/expenses.

Lesson 1: Create a Requisition

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Lesson 1: Create a Requisition

Key Terms

The following key terms are used in this lesson:

Term	Definition
Requisition	An internal INFORMS document for requesting goods and services. This is the formal transaction informing the purchasing department on what to order, how much to order, and when the order is needed, as well as other relevant information. Requisitions consist of these basic elements: headers, lines, schedules, and distributions. Each requisition has one header, which can have multiple lines. Each line can have multiple schedules. Each schedule can have multiple distributions. The schedule defines when and where users want the line items delivered. The distribution defines internal information for the schedule, such as how to charge accounts and departments for purchases including how much of the total price each department pays.
Requisition ID	This field is a system generated number associated with a requisition.
Requisition Lines	Also known as the "Line," and the second layer of a requisition, displays item details, adds functionality, and provides access to other requisition layers.
Requisition Name	Displays a description of the request to help identify a requisition as it flows through the system. Certain departments use this field to reflect the EAMS Requisition ID. If the field is left blank, the system uses~~d~~ the requisition ID as the name.
Requisitioner	A user that enters a requisition into INFORMS. Users with this role can create a requisition for themselves or on behalf of another Requestor within their department.
Save Confirmation Page	The Save Confirmation Page is intended to enable the requisitioner to view a summary of the final requisition.
Schedule Detail Page	The Schedule Detail Page is the third layer of a requisition, and it is used to review and modify schedule details for an item.
Search Results Page	The Search Results Page displays all items that meets the submitted search criteria.

Lesson 1: Create a Requisition

Key Terms

The following key terms are used in this lesson:

Term	Definition
Ship To	The department location where the supplier will ship the order.
Shopping Cart Page	The shopping cart page enables the requestor to review and update the shopping cart before proceeding to the checkout page.
Special Request	A method that allows requisitioners to enter item descriptions for goods or services that may not be active in the internal or external catalogs.
Supplier Item ID	Field used by certain departments to reflect EAMS Item ID.
Templates	Allows requisitioners to group items together to simplify ordering.
Web Suppliers Page	The Web Suppliers Page displays only suppliers who have established a direct connection with Miami-Dade County.

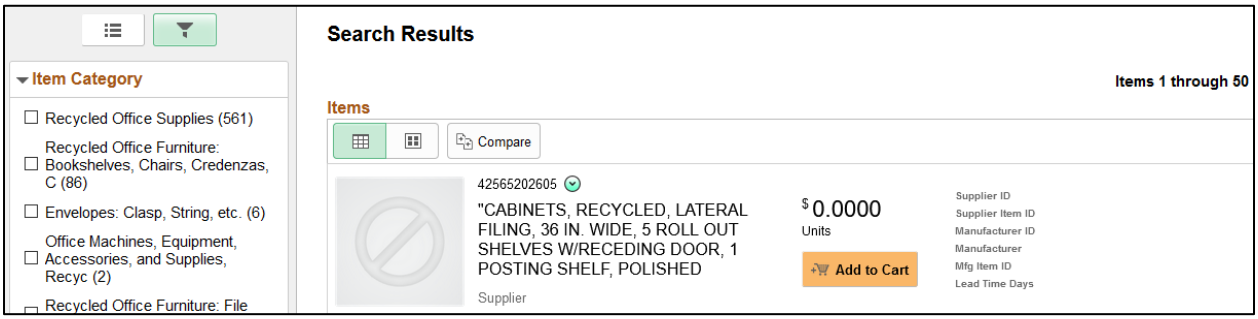
Lesson 1: Create a Requisition

Lecture 1: Selecting an Item

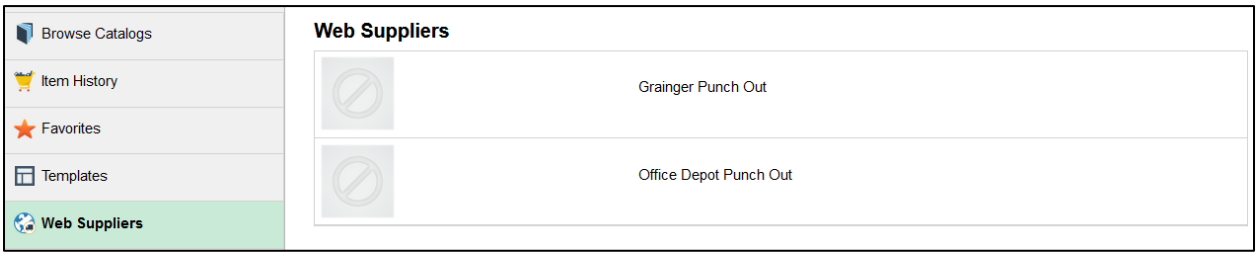
Selecting an Item

The INFORMS system provides several methods for adding items to a requisition. In this lecture the methods are introduced. Lectures that follow will further clarify the several options. **Note:** Job Aids can be found on the INFORMS training website on methods that are not detailed in this training manual.

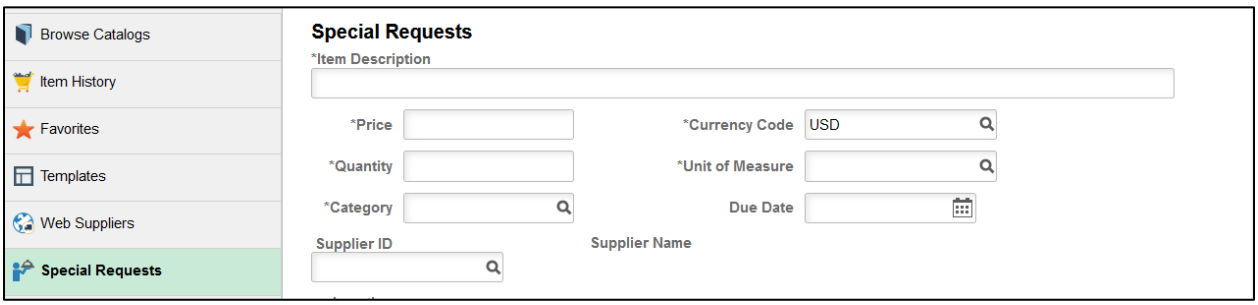
Catalogs – This is a method that consists of an internal catalog that Miami-Dade County has configured of active items (NIGP 7 to 11-Digits) and item categories (NIGP 5-digits) that are available to all business units. Specific item categories may require additional catalogs, and access is limited to particular users or departments.



Web Supplier (Punchout) – This is an external catalog maintained by a supplier and connected to the INFORMS system. Users have the ability to browse external catalogs and select items to include within the INFORMS requisition.



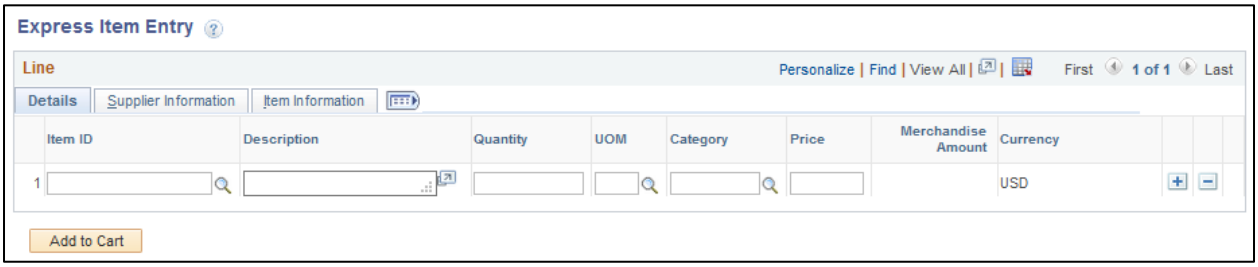
Special Request – This is a method to allow requisitioners to enter item descriptions for goods or services that are unava ilable in internal or external catalogs.



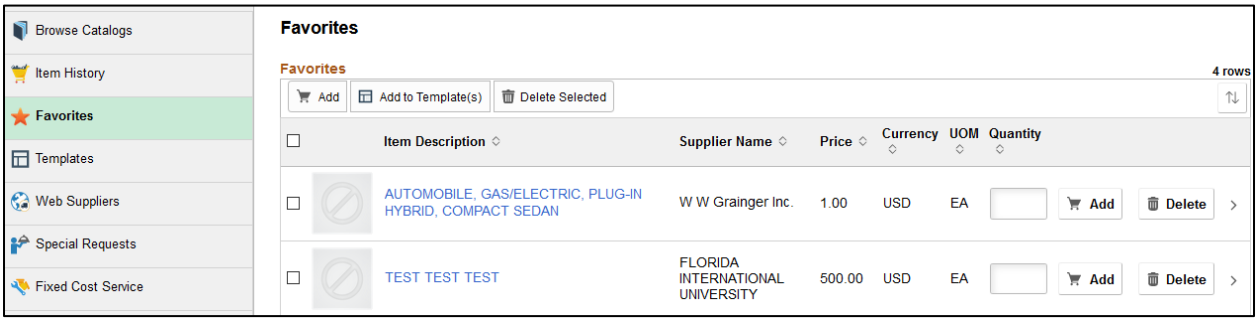
Lesson 1: Create a Requisition

Lecture 1: Selecting an Item

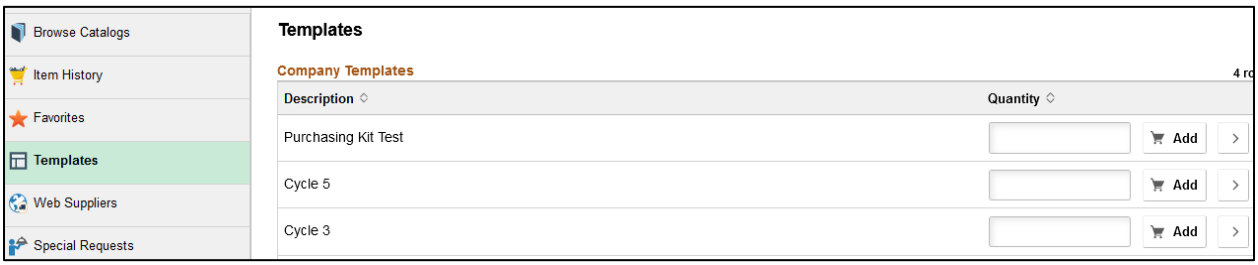
Express Item Entry – This feature allows requisitioners to quickly add items to a requisition using a streamlined online template. Using this template requires the requisitioner to know the Item ID and Item Category.



Favorites – This feature enables a requisitioner to create a list of frequently ordered items in a single location. An item favorite is a private list that is stored in the system by the user.



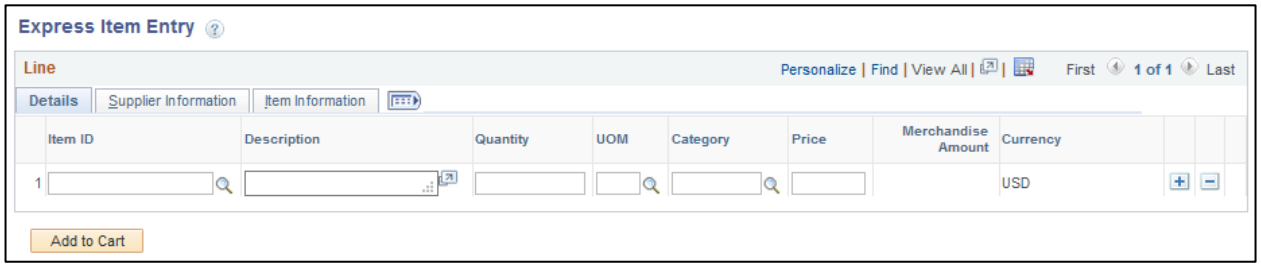
Templates – This is a method to group items together to simplify ordering. Templates can be created for personal or county-wide use.



Lesson 1: Create a Requisition

Lecture 2: Creating a Requisition from the Master Item Catalog

Express Item Entry – This feature allows requisitioners to quickly add items to a requisition using a streamlined online template. Using this template requires the requisitioner to know the Item ID and Item Category.



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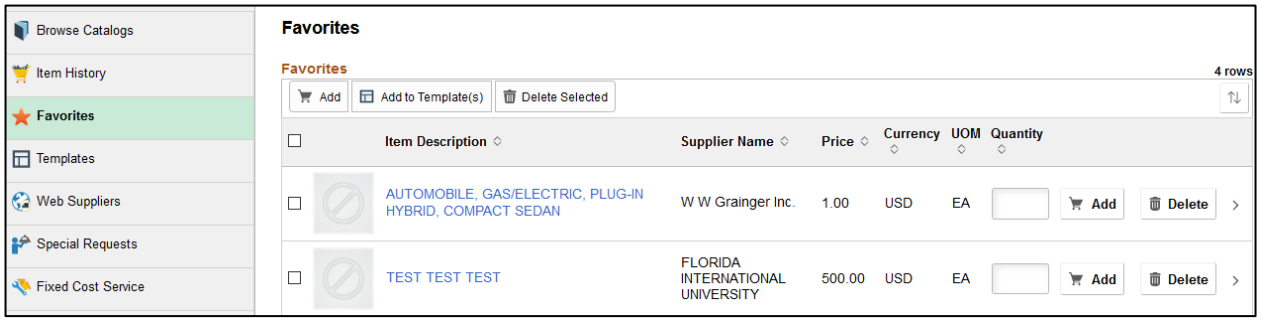

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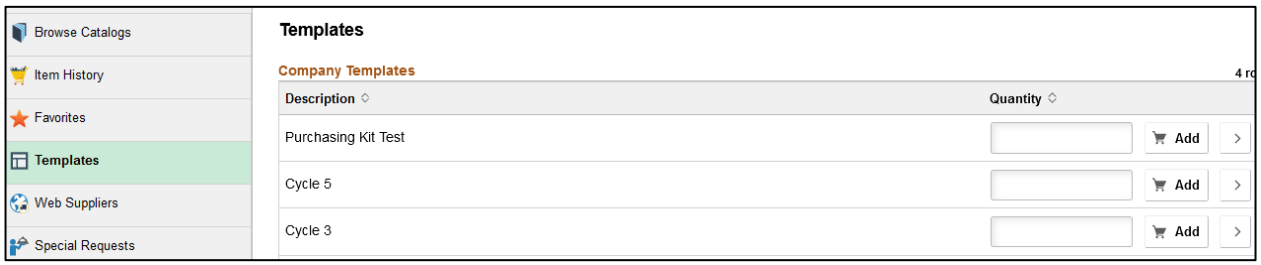
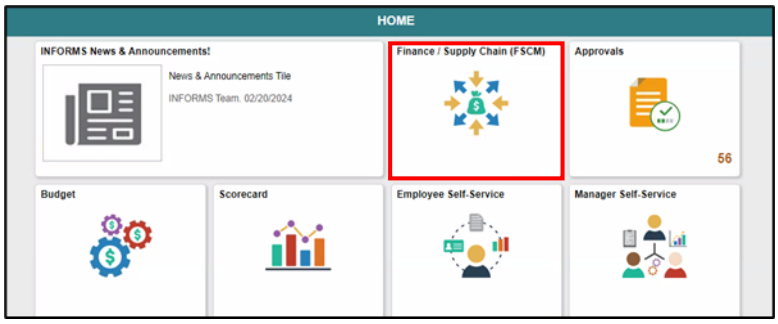


Lesson 1: Create a Requisition

Lecture 2: Creating a Special Request

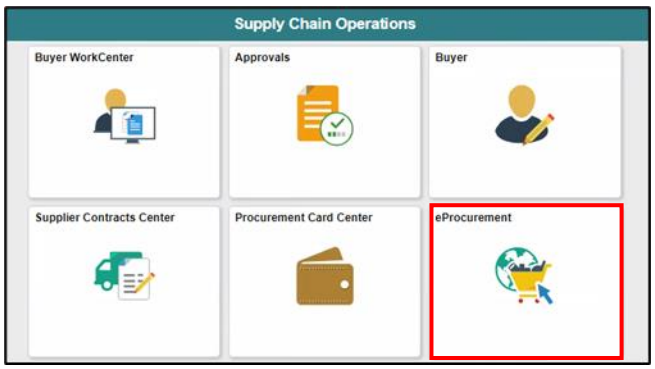
Navigate to **Finance/Supply Chain (FSCM) tile > Supply Chain Operations tile > eProcurement tile > Create Requisition tile**

1. Login into **INFORMS** and select the **FINANCE/SUPPLY CHAIN (FSCM).**



2. Select the **SUPPLY CHAIN OPERATION** tile.

3. Select the **ePROCUREMENT** tile.



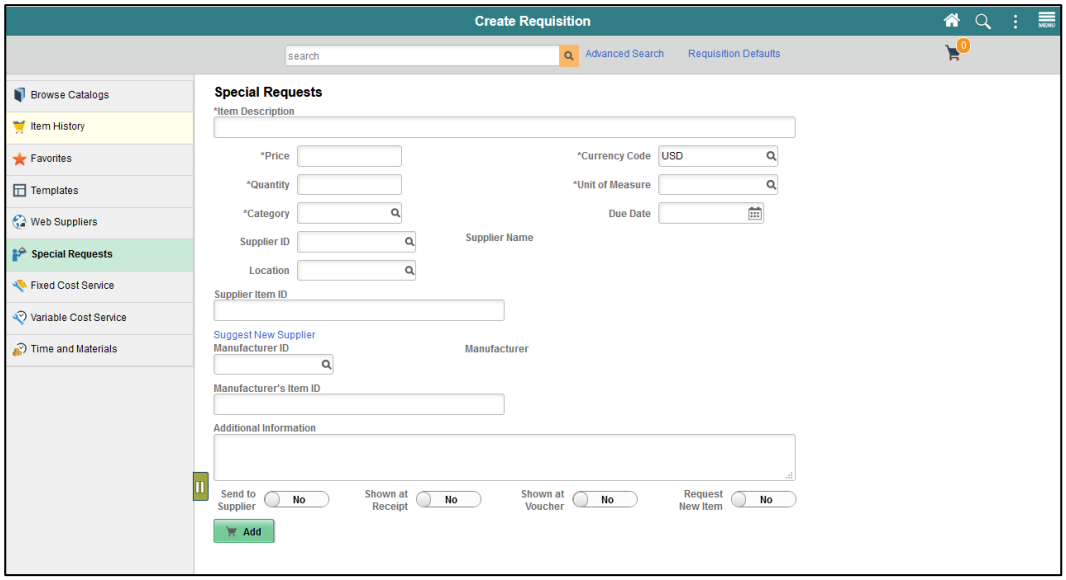
4. Select the **CREATE REQUISITION** tile.

Lesson 1: Create a Requisition

Lecture 2: Creating a Special Request

Special Requests

A **Special Request** is used to create a requisition for items or item categories not included in the Miami-Dade Item Catalog. A special request can be routed to the MDC Item Master to establish or activate a new NIGP item or item category.



Common fields used in a special request:

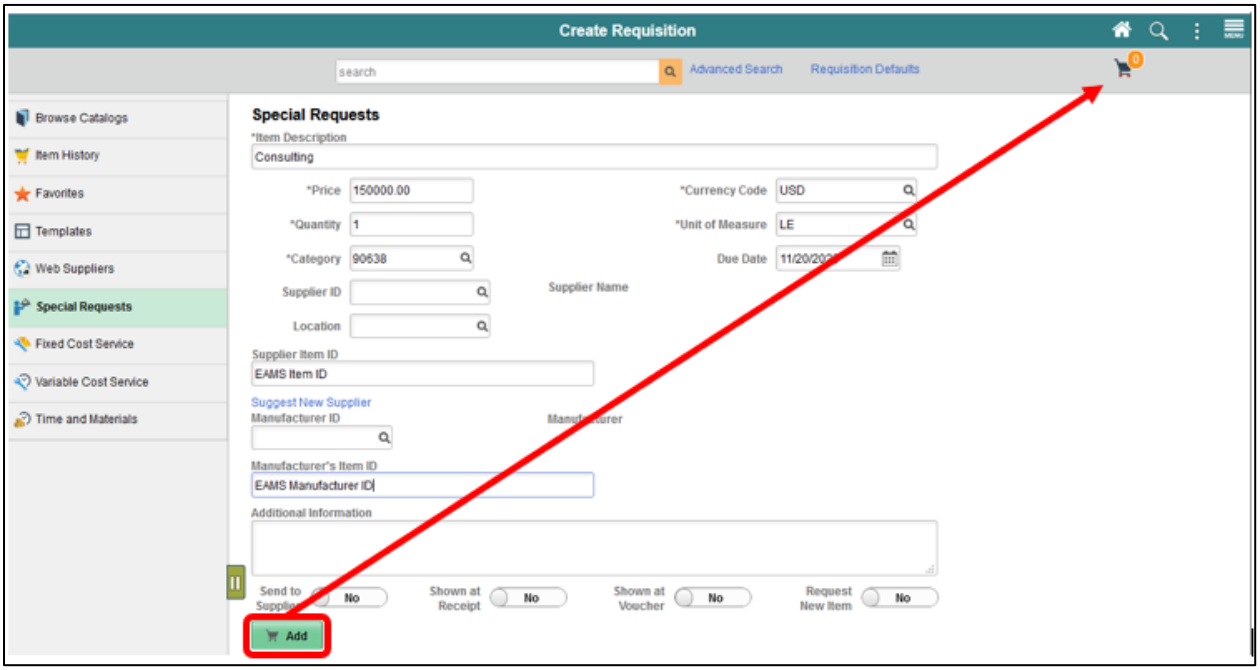
- **Additional Information** - Enter additional information that helps describe or support a special request.
- **Category** – The 5-digit NIGP item category to which this item or service belongs. The category ID enables the system to retrieve default values for the requisition.
- **Due Date** – The date the requester anticipates the receipt of the goods or service.
- **Item Description** – This is a brief description of the item that is needed.
- **Manufacturer Item ID** – Specific departments utilize this field (e.g., Transit) to display the EAMS Manufacturer ID. The field is key for integration between EAMS and INFORMS.
- **Price** – The unit or estimated cost of the item.
- **Request New Item** – Select this option to request that the item be added to the Miami-Dade Master Item Catalog. When this option is selected, a request new item worklist notification is sent to central procurement.
- **Shopping Cart** – Is a tool used to create requisitions. The cart displays requisition line items, quantities, and costs.
- **Supplier Item ID** - Specific departments utilize this field (e.g., Transit) to display the EAMS Item ID. This field is key for integrations between EAMS and INFORMS.

Unit of Measure (UOM) – Select the type of unit used for the item shipping to the requisitioner (e.g., EA, BX, LE).

Lesson 1: Create a Requisition

Lecture 2: Creating a Special Request

5. Select the **ADD** button located at the bottom left of the screen. Once the requisitioner selects and enters all required fields, update the shopping cart with the special request item details to display a count on the shopping cart icon.
6. Select the **SHOPPING CART** button to confirm all line items, quantities, and costs are correct.



Lesson 1: Create a Requisition

Lecture 2: Creating a Special Request

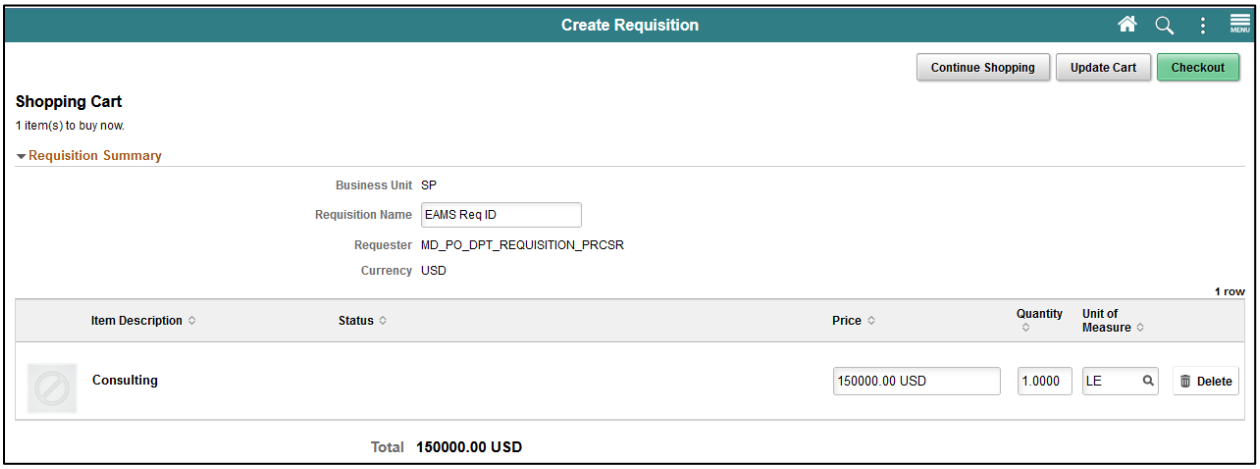
Shopping Cart Page

The Shopping Cart page enables the requestor to review and update the shopping cart before proceeding to the **CHECKOUT** page. Below includes several actions and options available:

- The **REQUISITION NAME** field can be updated to reflect a description that makes it easier for the approver to identify.

Note: Several departments use this field (e.g., Transit) to reflect the ***EAMS Requisition ID***. This field is required for EAMS and INFORMS integration.

- The **QUANTITY** field can be updated.
- The **DELETE** button can be selected to remove items from the shopping cart.
- The **CONTINUE SHOPPING** button can be selected to return to the Miami-Dade Item Catalog to add additional items.
- If changes are made to the shopping cart, it is necessary to select the **UPDATE CART** button to save any changes.



Lesson 1: Create a Requisition

Lecture 2: Creating a Special Request

Checkout Page

The checkout page is the last step before submitting the requisition for approval. The requisitioner must verify and perform various actions in each section. The ***Requisition Summary*** section (also known as the "Header," and the first layer of a requisition) displays default values from the requisitioner's user profile (i.e., business unit, requestor, and currency). The requisitioner must:

7. Verify or update the **REQUISITION NAME** field to reflect a description that makes it easier for the approver to identify. If the field is left blank, the system uses the Requisition ID as the name.

   Note: Several departments use this field (e.g., Transit) to reflect the ***EAMS Requisition ID***. This field is required for EAMS and INFORMS integration.

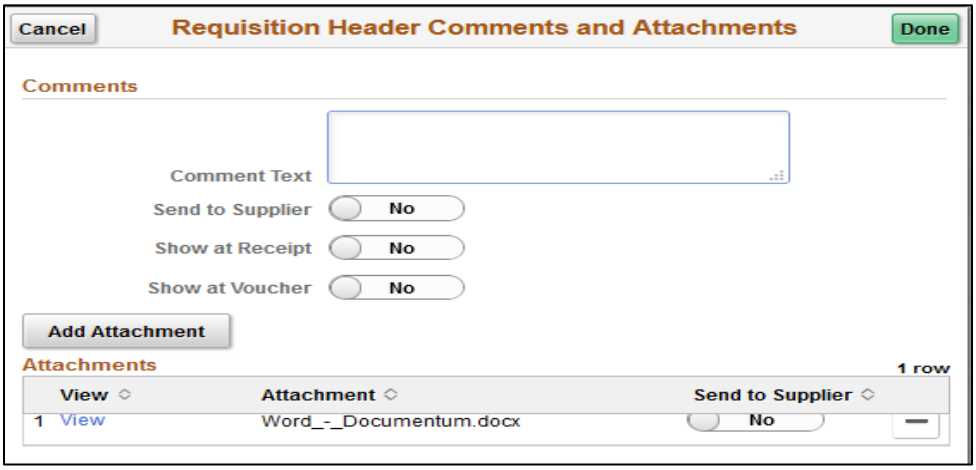
8. Select the appropriate **PRIORITY** value to indicate the priority level to the approver. The approver has visibility to the priority field on the approver page.
   i. Low
   ii. Medium (system default)
   iii. High

Lesson 1: Create a Requisition

Lecture 2: Creating a Special Request

The **REQUISITION HEADER COMMENTS AND ATTACHMENTS** button is available to enter comment text and add attachments. An additional comment functionality is available to display text on other transactions downstream (e.g., receipt, voucher).

Note: This functionality is essential when the item is not in the item catalog. The requisitioner should include all market research (pictures, specifications, scope-of-work) associated with the item. The Buyer or Procurement Officer leverages this information for the creation of a sourcing event.



The ***Requisition Lines*** section (also known as the "Line," and the second layer of a requisition) displays item details, adds functionality, and provides access to other requisition layers.

- The **ADD TO FAVORITES** button is available to add the selected lines to the favorites list for future use.
- The **DELETE SELECTED** button deletes the selected requisition lines.

9. Select the **SCHEDULE DETAIL** button once the requisition line has been verified.

Lesson 1: Create a Requisition

Lecture 2: Creating a Special Request

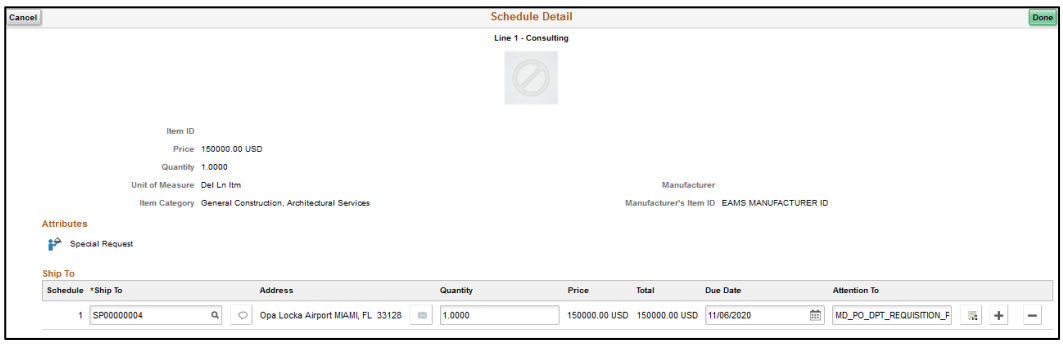
Schedule Detail Page

The Schedule Page is the third layer of a requisition, and is used to review and modify schedule details for an item.

10. Review or update the **SHIP TO** field. This field designates where the goods from a supplier were received.

Note: All ship to values begin with the business unit prefix (i.e., TP for Transit). Please notify the purchasing section if the desired location is not found so they can contact procurement for location table updates.

11. Update the **DUE DATE** field. This field defines what date items are expected to arrive at the SHIP TO location.
12. Select the **DISTRIBUTION** icon once the schedule detail page has been reviewed or updated. The system then routes to the Distribution page.



Distribution Page

The Distribution Page is the fourth layer of a requisition used to enter accounting information (ChartFields). While there are several tabs on this page this lecture concentrates on the **CHARTFIELDS 1** and **CHARTFIELDS 2** tabs.

Note: The accounting information entered at the beginning of the procure-to-pay process (requisition) carries over to the purchase order and voucher. It is prudent that the correct ChartField values are added before the transaction is submitted for approval (e.g. ensuring that the correct GL Business Unit is selected). This action facilitates prompt payment to the supplier.

13. Select the **CHARTFIELD2** tab.

Lesson 1: Create a Requisition

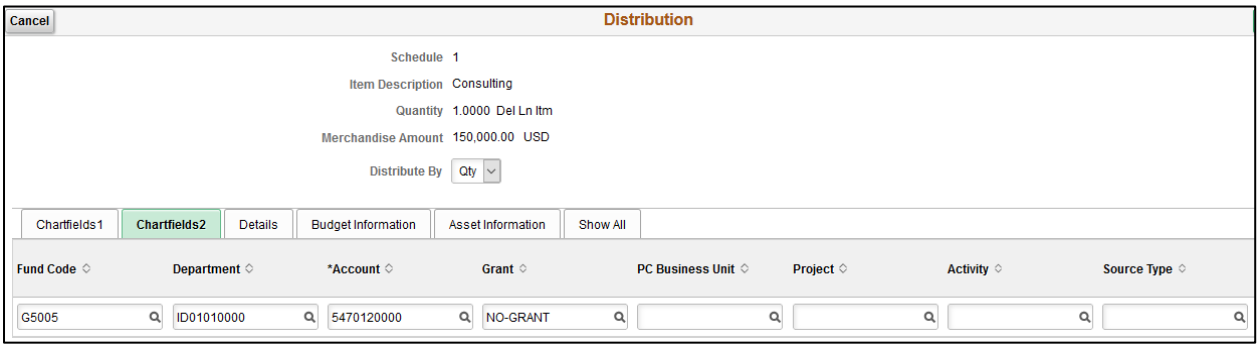
Lecture 2: Creating a Special Request

14. Enter a **FUND CODE** value.
15. Enter a **DEPARTMENT** value
16. Enter an **ACCOUNT** value
17. Enter a **GRANT** value.

Note: A requisitioner must enter an actual grant value if this item is expensed to an active grant. If not, the "**NO-GRANT**" value must be selected.

The following fields are required when expensing an item to an active capital or operational project that has been created in the Project Costing module. Leave the fields blank if there are no expenses to a project.

18. Enter a **PC BUSINESS UNIT** value. This field should reflect the Business Unit of the requestor.
19. Enter a **PROJECT** value. This value is created in the Project Costing module.
20. Enter an **ACTIVITY** value. The activity value represents a subtask of a project in project costing (i.e., Planning, Design).
21. Enter a **SOURCE TYPE** value. This source type field should only be used when the project is GOB funded.



22. Select the **DONE** button when all ChartField values have been selected.

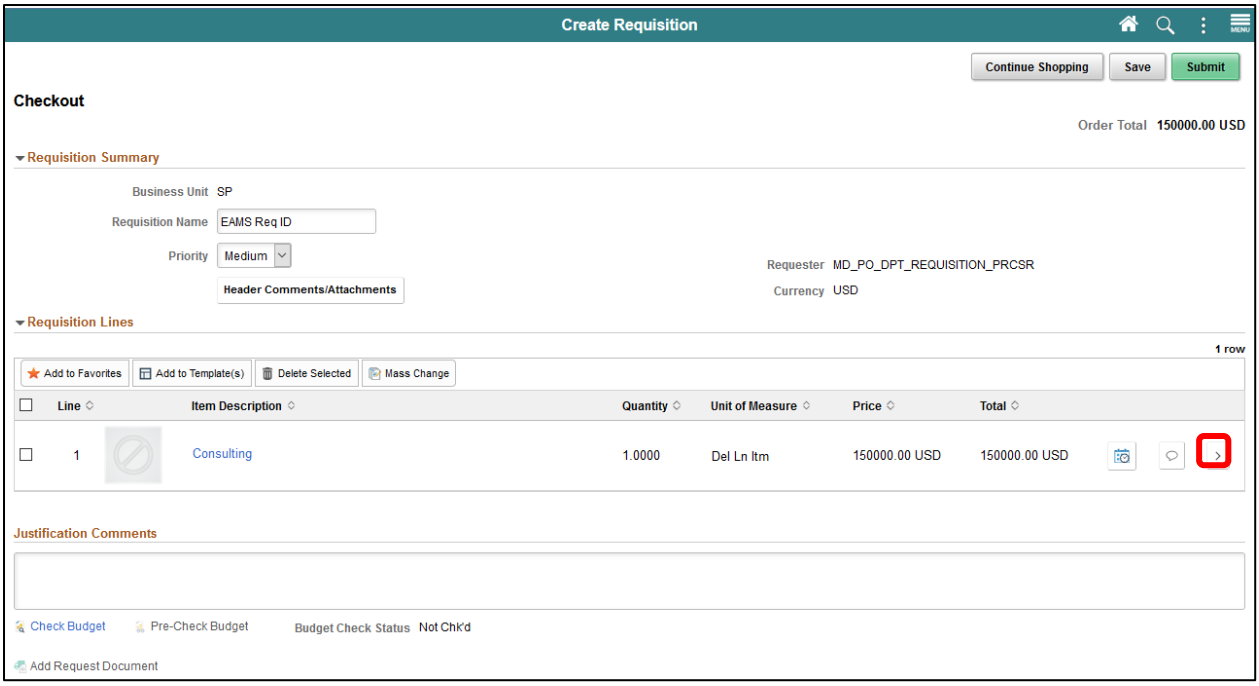
The system then returns to the Checkout page.

Lesson 1: Create a Requisition

Lecture 2: Creating a Special Request

Note: The following instruction is for departments (i.e., Transit) who leverage the EAMS and INFORMS integration.

23. Select the **LINE DETAILS** button located on the *Requisition Lines* section.



Lesson 1: Create a Requisition

Lecture 2: Creating a Special Request

Line Details Page

The Line Details page is used to verify and edit additional details for a line. As mentioned previously, there are several fields highlighted which are vital for EAMS and INFORMS integration.

1. Enter the **SUPPLIER CATALOG NUMBER** value.

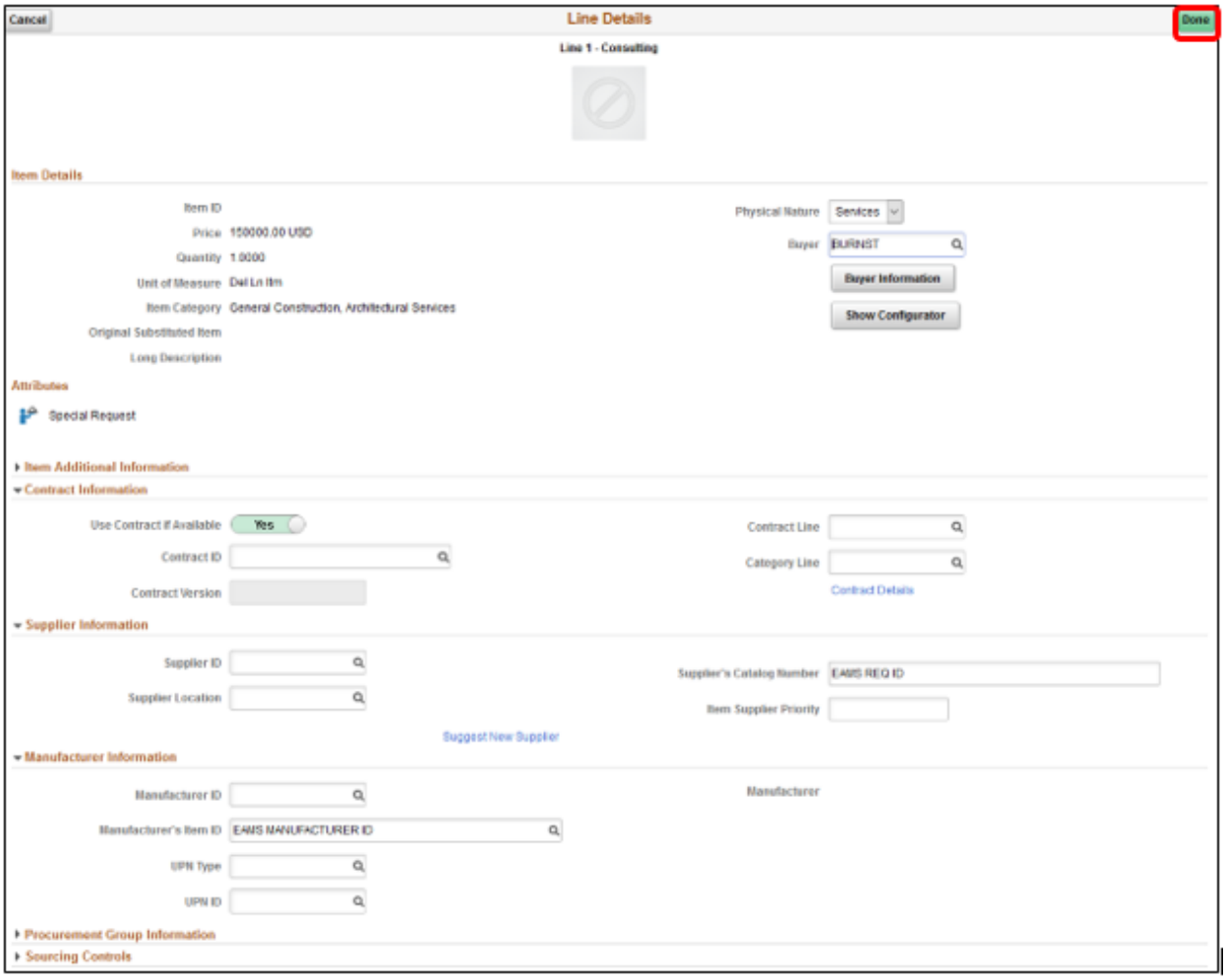
Note: Several departments use this field (e.g., Transit) to reflect the ***EAMS Requisition ID***. This field is required for EAMS and INFORMS integration.

2. Enter the **MANUFACTURER'S ITEM ID** value.

Note: Several departments use this field (e.g., Transit) to reflect the ***EAMS Manufacturer ID***. This field is required for EAMS and INFORMS integration.

3. Select the **DONE** button when updates and relevant fields are verified.

The system then routes to the Checkout page.

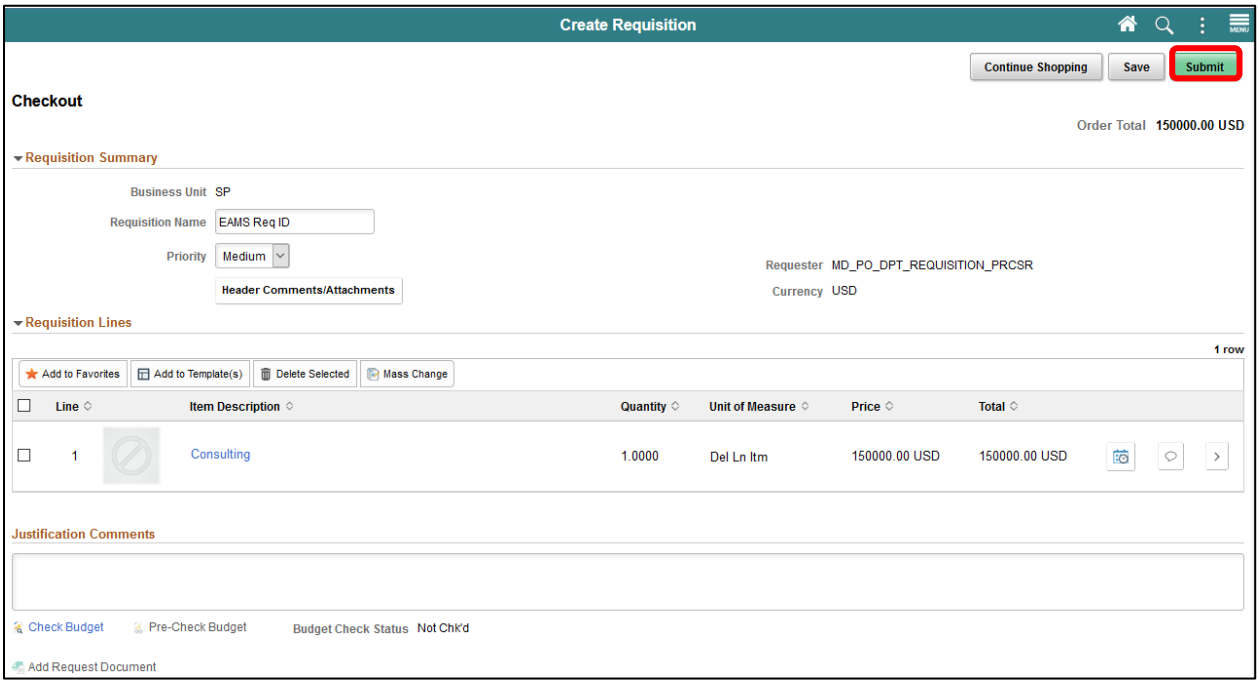


Lesson 1: Create a Requisition

Lecture 2: Creating a Special Request

Note: Please ensure the steps noted above are followed for each requisition line. A requisition line requires an update to the ChartField values on the Distribution page before submitting the requisition for approval.

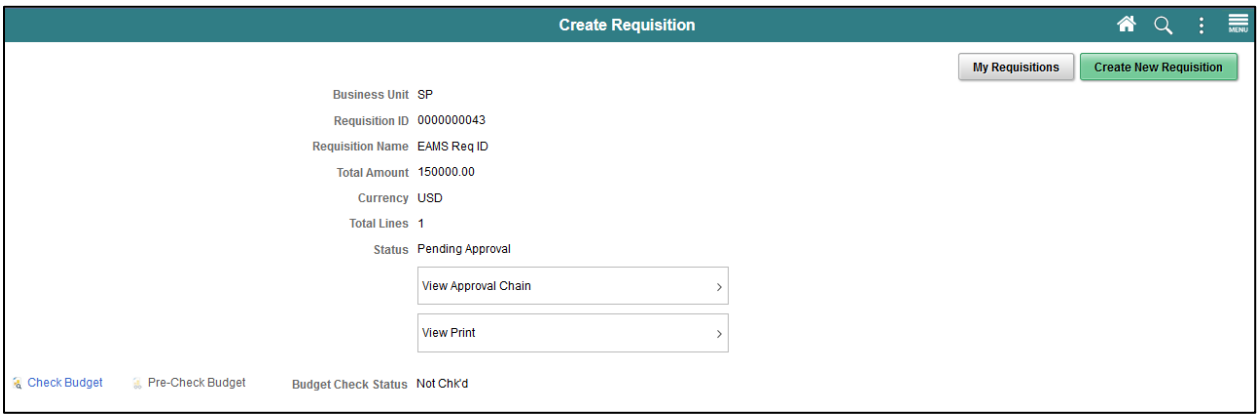
27. Select the **SUBMIT** button when all relevant fields are updated. The system then routes to the Save Confirmation page.



Save Confirmation Page

The Save Confirmation page is intended to enable the requisitioner to view a summary of the final requisition. It also provides access to preview the approval workflow and to print the requisition.

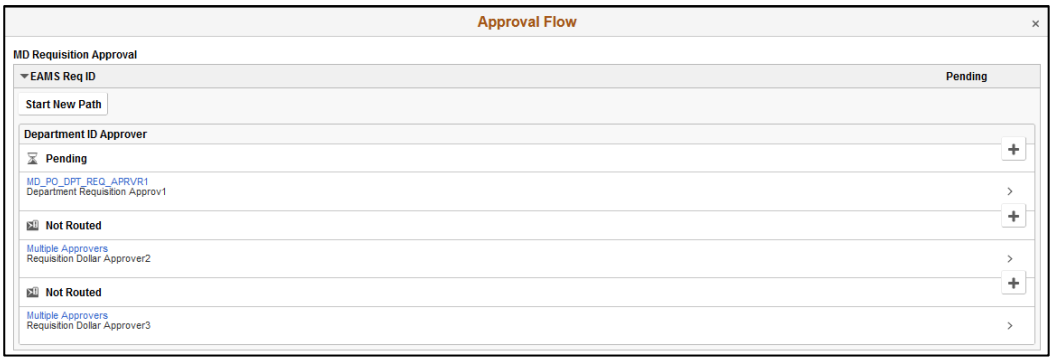
28. Select the **VIEW APPROVAL CHAIN** button to view the list of approvers for the requisition.



Lesson 1: Create a Requisition

Lecture 2: Creating a Special Request

Note: Miami-Dade County follows a standard approval workflow process for all requisitions. Workflow details are included in Module 3 (Managing Requisitions), Lecture 1 (Approvals).



Lesson 1: Lesson Summary

Lesson Summary

Now that you have completed the Manage and Record Requisitions lesson, you should be able to:

- Select an Item
- Create a Special Request

Lesson 2: Manage a Requisition

Lesson 1: Overview

At the conclusion of this lesson, you will be able to:

- Copy a Requisition
- Edit a Requisition
- View and Print a Requisition
- Cancel a Requisition

Lesson 2: Manage a Requisition

Lesson 1: Introduction

<Insert the Visio Diagram of the related Sub-Process.>

<If this requires additional pages, remember to insert two pages in this document for each page to be displayed in the participants' Training Guide. On the leading page—typically the Instructor Notes page—insert the statement: (Intentionally left blank)>

Lesson 2: Manage a Requisition

Key Terms

The following key terms are used in this lesson:

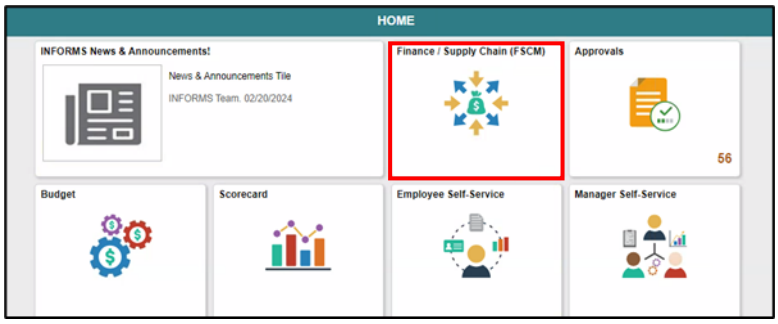
Term	Definition
Checkout Page	The last step before submitting a requisition for approval.
Distribution Page	The Distribution Page is the fourth layer of a requisition used to enter accounting information (ChartFields).
Edit Requisition Page	The Edit Requisition Page enables the requisitioner to make changes to a requisition.
My Requisitions Page	Used to view or act on requisitions created by the requisitioner.
Requisition Lines Section	Also known as the "Line," and the second layer of a requisition, the requisition lines section displays item details, adds functionality, and provides access to other requisition layers.
Requisition Summary	Also known as the "Header" and the first layer of a requisition, the Requisition Summary displays default values from the requisitioner's user profile (i.e., business unit, requestor, and currency).
Save Confirmation Page	The Save Confirmation Page enables the requisitioner to view a summary of the final requisition.
Schedule Detail Page	The Schedule Detail Page is the third layer of a requisition and is used to review and modify schedule details for an item.
Shopping Cart Page	Enables the requestor to review and update the shopping cart before proceeding to the checkout page.

Lesson 2: Manage a Requisition

Lecture 1: Copy a Requisition

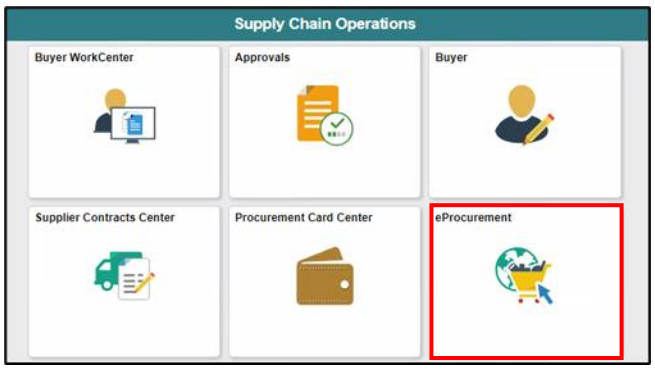
Navigate to **Finance/Supply Chain (FSCM) tile > Supply Chain Operations tile > eProcurement tile > Create Requisition tile**

1. Login into **INFORMS** and select the **FINANCE/SUPPLY CHAIN (FSCM).**



2. Select the **SUPPLY CHAIN OPERATION** tile.

3. Select the **ePROCUREMENT** tile.



4. Select the **MY REQUISITION** tile.

Lesson 2: Manage a Requisition

Lecture 1: Copy a Requisition

Common Elements Used in My Requisition

The **FILTER BY** button is used to narrow the such results on the My Requisitions page.
The **RELATED ACTIONS** button is used to display available actions such as:

- Details
- Copy
- View Print
- Budget Check
- Edit

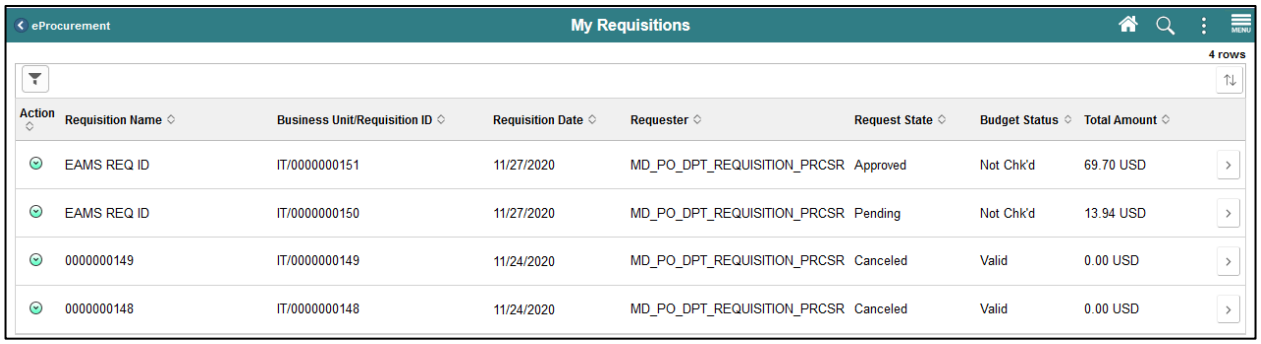
The **VIEW DETAILS** button is used for the Line Details page.

My Requisitions Page

This page is used to view or act on requisitions created by the requisitioner. The page displays the requisition name, business unit, requisition ID, requester, request state, budget status, and total amount.

Note: A requisitioner may have access to all related actions; however, this lecture only covers the copy option.

5. Select the **RELATED ACTION** icon. The system then displays the actions menu. **Note:** The requisitioner must select the related action icon of the requisition to copy.



6. Select the **COPY** option. The system then routes the requisitioner to the shopping cart page.

Lesson 2: Manage a Requisition

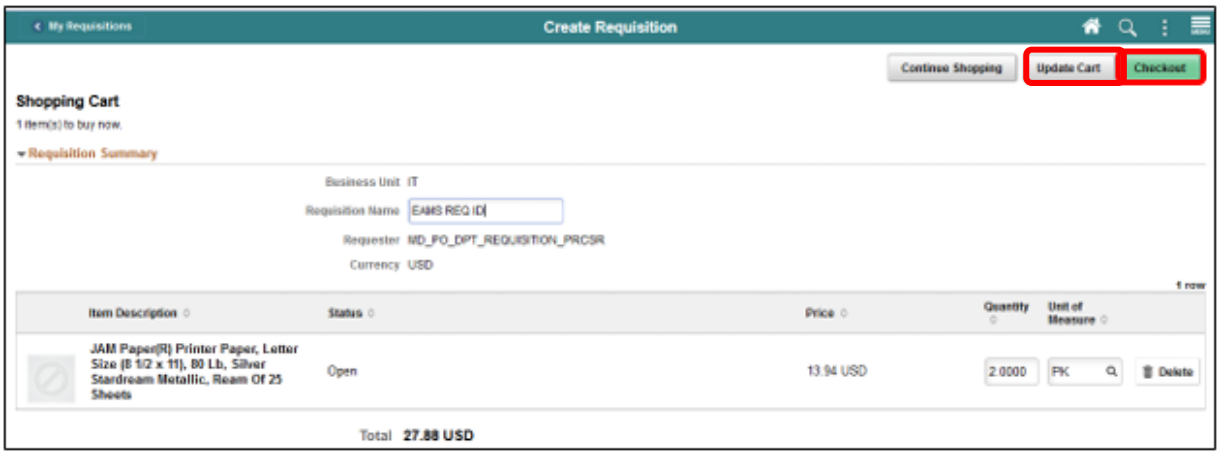
Lecture 1: Copy a Requisition

The copy functionality defaults the requisition header, line, schedule, and distribution details on a new requisition. It also copies any comments and attachments added to the header, line, or schedule. Note that the data is copied but not saved to the shopping cart page.

Shopping Cart Page

The shopping cart page displays recently selected or copied items from a requisition. The requisitioner can update the requisition name, quantity, unit of measure, and delete lines. The user can also select the continue shopping option to add additional items or select the **UPDATE CART** button to reflect recent changes on the shopping cart page. The last step is to select the **CHECKOUT** button to proceed to the checkout page.

7. Update the **REQUISITION NAME** field. If the field is left blank, the system defaults to the Requisition ID as the name.
   Note: Several departments use this field (e.g., Transit) to reflect the ***EAMS Requisition ID***.
8. Update the **QUANTITY** field. This action increases or decreases the number of items requested.
9. Select the **UNIT OF MEASURE** value. Usually, the unit of measure is static on most items. The requisitioner can select another value, but it may require further discussion with the buyer before the requisition is sourced.
10. Select the **DELETE** button. This action deletes the item selected from the shopping cart.
11. Select the **UPDATE CART** button. This action saves any changes and updates the shopping cart.
12. Select the **CHECKOUT** button. This action routes the requisitioner to the checkout page.



Lesson 2: Manage a Requisition

Lecture 1: Copy a Requisition

Checkout Page

The Checkout page is the last step before submitting the requisition for approval. The requisitioner is required to verify and perform various actions on each section. The ***Requisition Summary*** section (also known as the "Header" and the first layer of a requisition) displays default values from the requisitioner's user profile (i.e., business unit, requestor, and currency). The requisitioner must:

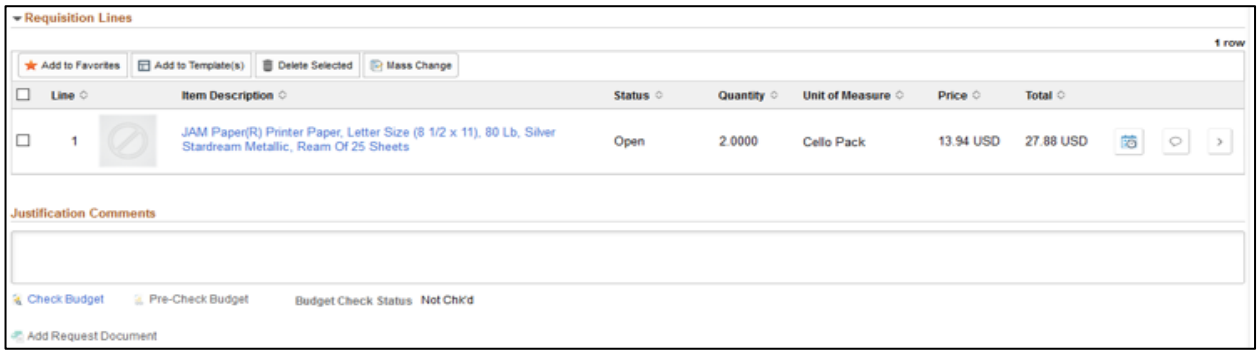
1. Verify the **REQUISITION NAME** field. The requisitioner should reflect a description that makes it easier for the approver to identify.
2. Select the **PRIORITY** value. The approver has visibility to the priority field on the approver page.
   - Low
   - Medium (system default)
   - High
3. Select the **HEADER COMMENTS/ATTACHMENTS** button. This functionality is available to enter comment text and add attachments.
   Note: The requisitioner may need to attach market research if the item is not on an existing contract. The buyer or procurement officer uses the attached market research (i.e., pictures and item specifications) to source the requisition.

Lesson 2: Manage a Requisition

Lecture 1: Copy a Requisition

The ***Requisition Lines*** section (also known as the "Line," and the second layer of a requisition) displays item details, adds functionality, and provides access to other requisition layers.

1. The **ADD TO FAVORITES** button is available to add the selected lines to the favorites list for future use.
2. The **DELETE SELECTED** button deletes the selected requisition lines.
3. Once the requisition line has been verified, select the **SCHEDULE DETAIL** button.

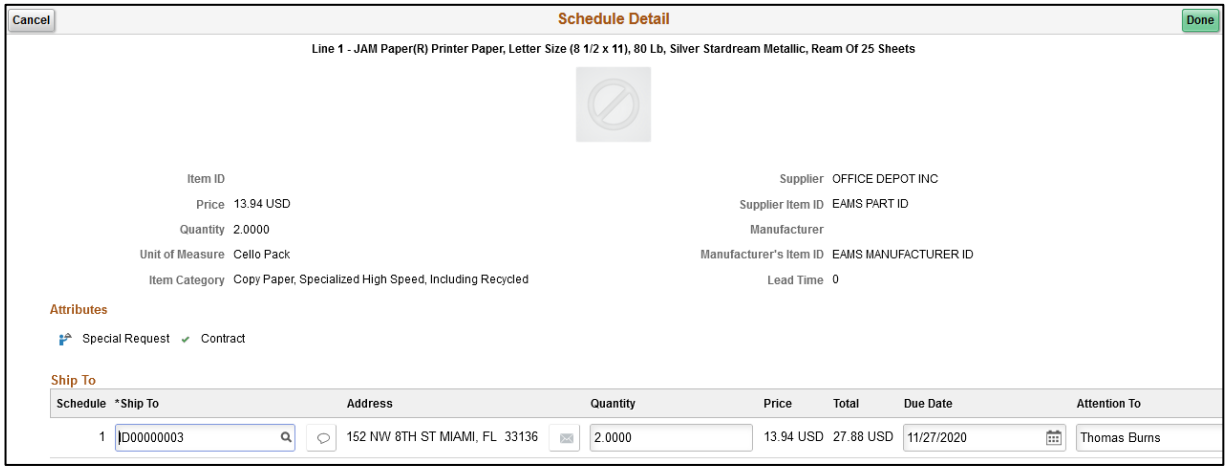


Schedule Detail Page: The Schedule Page is the third layer of a requisition, and it is used to review or modify schedule details for an item.

4. Select the **SHIP TO** value. The field designates where the requisitioner wants to receive the goods or services from a supplier.

Note: All ship to values begins with the business unit prefix (i.e., TP for Transit). Please notify the purchasing section if the desired location is not found so the team may contact procurement for location table updates.

5. Select the **DUE DATE** value. This field defines what date items are expected to arrive at the ship-to location.
6. Select the **DISTRIBUTION** icon. The system then routes the requisitioner to the distribution page.



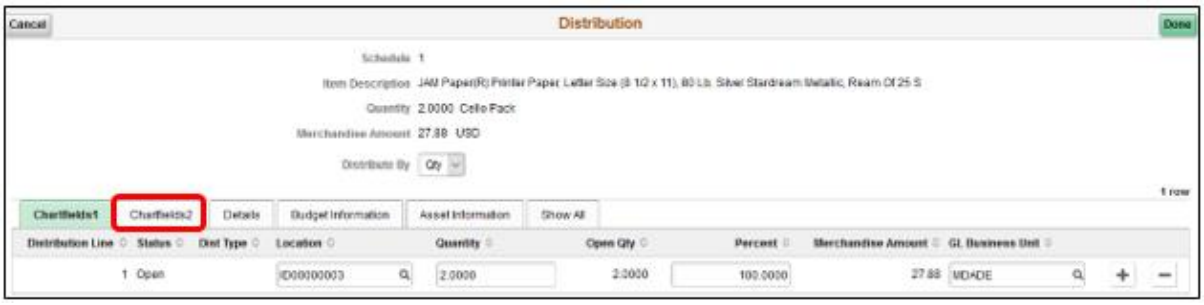
Lesson 2: Manage a Requisition

Lecture 1: Copy a Requisition

Distribution Page: The distribution page is the fourth layer of a requisition used to enter accounting information (ChartFields). There are several tabs on this page, but we will only concentrate on the **CHARTFIELDS 1** and **CHARTFIELDS 2** tabs.

Note: The accounting information entered at the beginning of the procure-to-pay process (requisition) carries over to the purchase order and voucher. It is prudent that the correct ChartField values are added before the transaction is submitted for approval (e.g. ensuring that the correct GL Business Unit is selected). This action facilitates prompt payment of a supplier.

22. Select your **GL BUSINESS UNIT**.
23. Select the **CHARTFIELD2** tab.



24. Select the **FUND CODE** value.
25. Select the **DEPARTMENT** value.
26. Select the **ACCOUNT** value.
27. Select the **GRANT** value.

Note: A requisitioner must enter an actual grant value if this item is expensed to an active grant. If not, the "**NO-GRANT**" value must be selected.

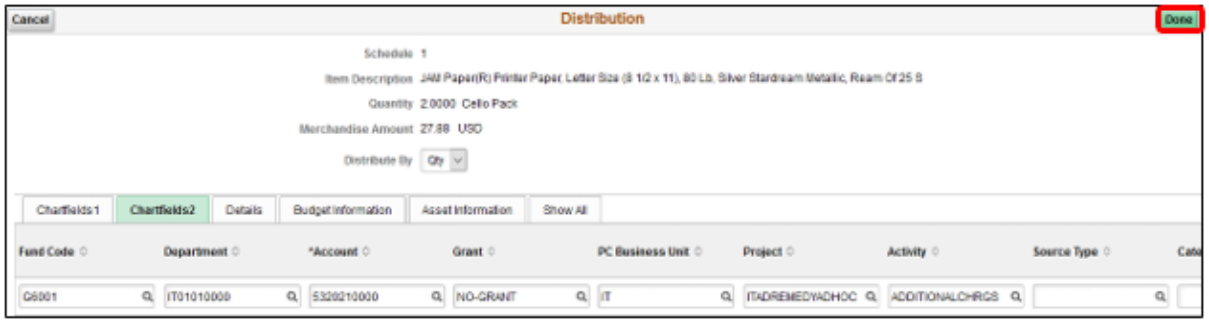
Note: The following fields are required when expensing an item to an active capital or operational project that has been created in the Project Costing module. The fields remain blank if they are not being expensed to a project.

28. Select the **PC BUSINESS UNIT** value. This field should reflect the business unit of the requestor.
29. Select the **PROJECT** value. The project value is created in the project costing module.
30. Select the **ACTIVITY** value. The activity value represents a subtask of a project (i.e., Planning, Design), and the value is created in the project costing module.
31. Select the **SOURCE TYPE** value. The source type field should only be selected when a project is GOB funded.

Lesson 2: Manage a Requisition

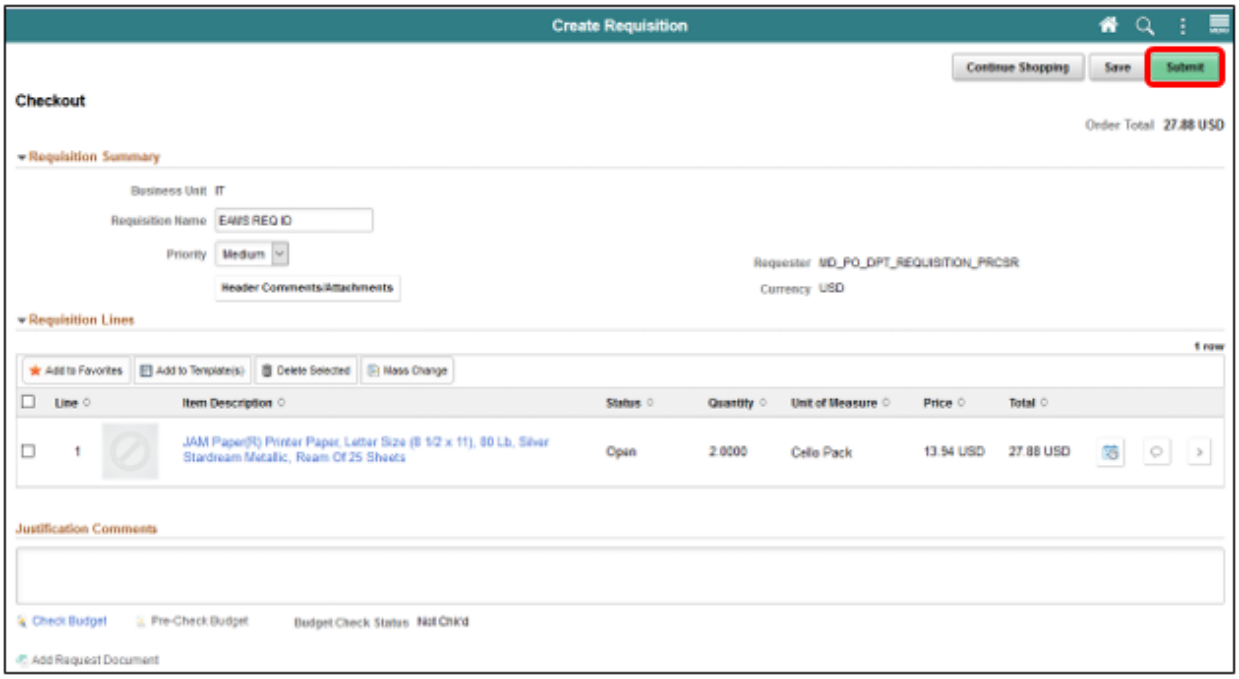
Lecture 1: Copy a Requisition

32. Select the **DONE** button once the pertinent fields are entered. The system then routes the requisitioner to the checkout page.



Note: Please make sure to follow the steps noted above for each requisition line. A requisition line requires an update to the ChartField values on the Distribution page before submitting the requisition for approval.

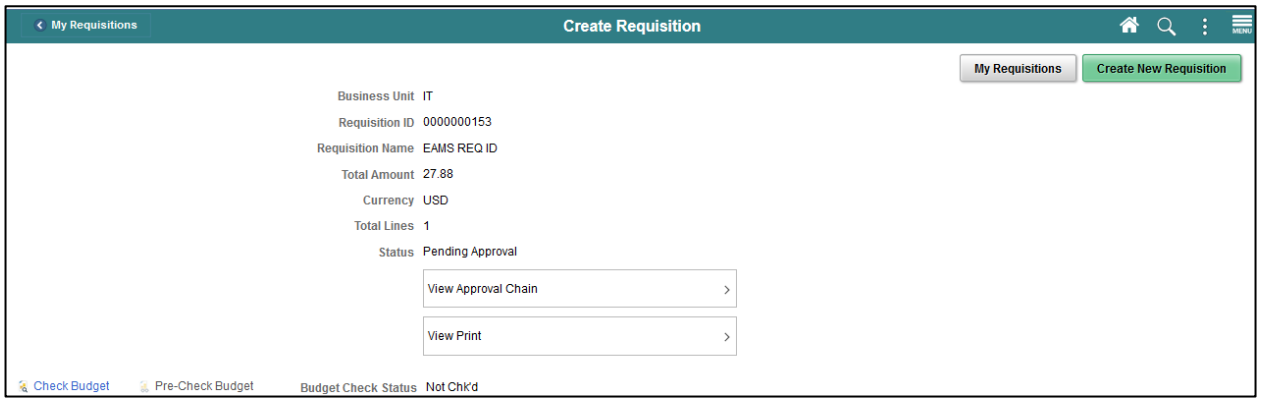
33. Select the **SUBMIT** button. The system then routes to the Save Confirmation page.



Lesson 2: Manage a Requisition

Lecture 1: Copy a Requisition

Save Confirmation Page: The save confirmation page provides the requisitioner with a summary of the final requisition. Also, it gives access to view the approval chain and print the requisition.

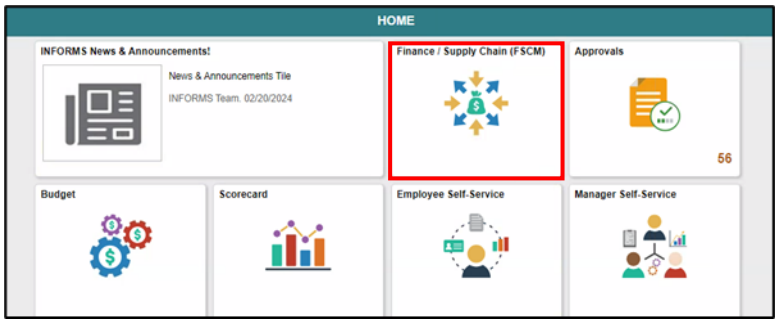


Lesson 2: Manage a Requisition

Lecture 2: Edit a Requisition

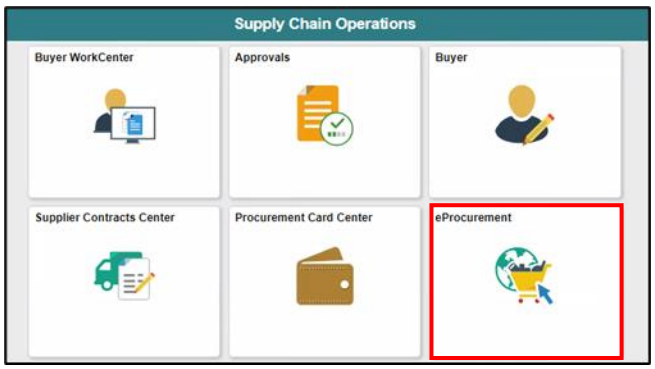
Navigate to **Finance/Supply Chain (FSCM) tile > Supply Chain Operations tile > eProcurement tile > My Requisition tile**

1. Login into **INFORMS** and select the **FINANCE/SUPPLY CHAIN (FSCM).**



2. Select the **SUPPLY CHAIN OPERATION** tile.

3. Select the **ePROCUREMENT** tile.



4. Select the **MY REQUISITION** tile.

Lesson 2: Manage a Requisition

Lecture 2: Edit a Requisition

Common Elements Used in My Requisition:
The **FILTER BY** button is used to narrow the such results on the my requisitions page.
The **RELATED ACTIONS** button is used to display the available actions such as:

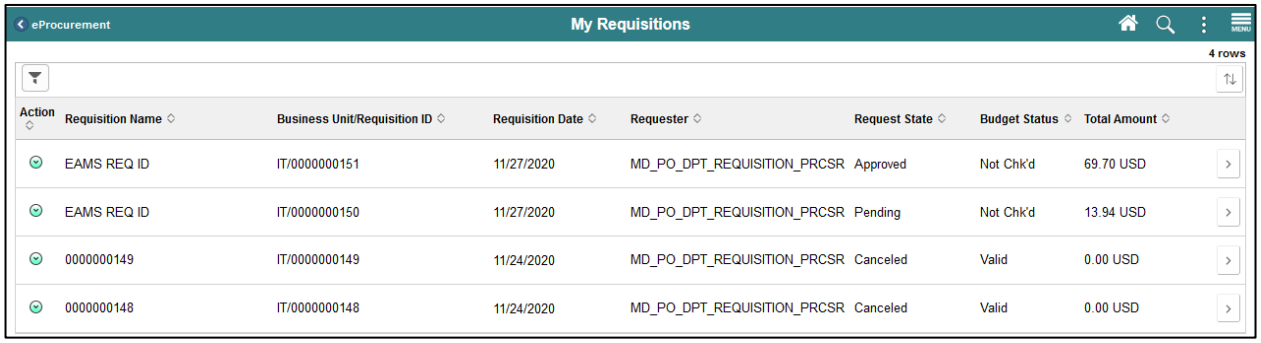
- Details
- Copy
- View Print
- Budget Check
- Edit

The **VIEW DETAILS** button is used for the Line Details page.

My Requisition Page: My requisitions page is used to view or take action on requisitions created by the requisitioner. The page displays the requisition name, business unit, requisition ID, requester, request state, budget status, and total amount.

Note: A requisitioner may have access to all the related actions; however, this lecture only covers the edit option.

1. Select the **RELATED ACTION** icon. The system then displays the actions menu.



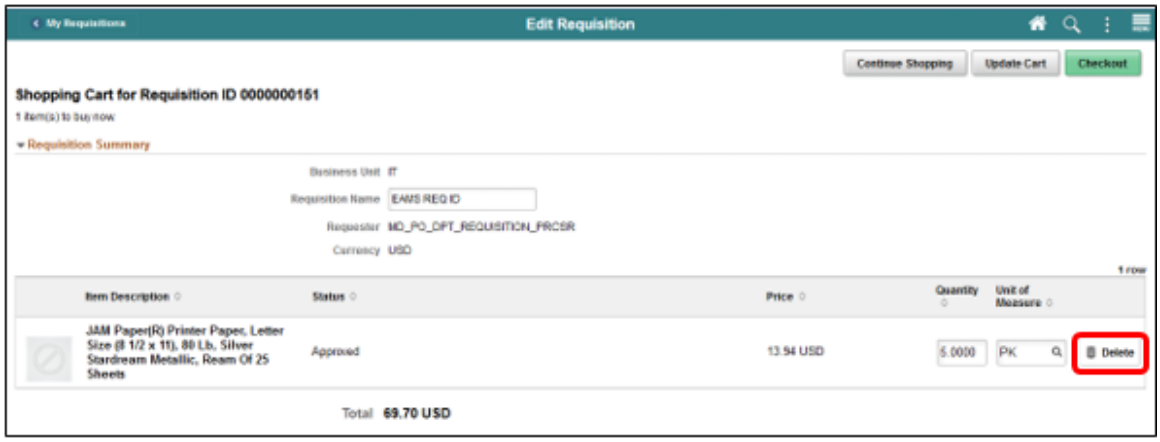
2. Select the **EDIT** option. The system then routes the requisitioner to the edit requisition page.

Lesson 2: Manage a Requisition

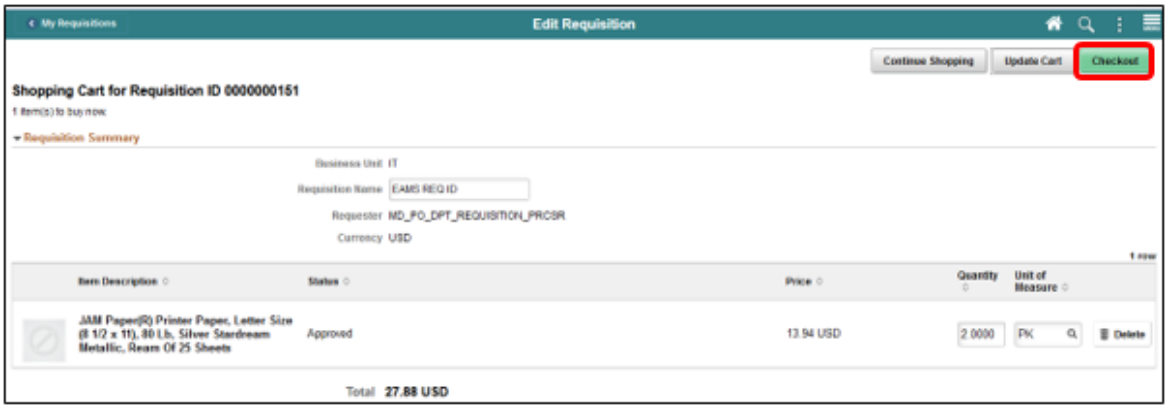
Lecture 2: Edit a Requisition

Edit Requisition Page: The edit requisition page enables the requisitioner to make changes to the requisition. Changes include quantity, unit of measure, requisition name, and delete a line. The requisitioner can also select the continue shopping option to add more items to the requisition or select check out to finalize the transaction.

3. Edit the **QUANTITY** field. This action increases or decreases the number of items requested.
4. Select the **UNIT OF MEASURE**.
   Note: Usually, the unit of measure is static on most items. The requisitioner can select another value, but it may require further discussion with the buyer before the requisition is sourced.
5. Update the **REQUISITION NAME** field.
   Note: If the field is left blank, the system defaults the requisition ID. Also, several departments use this field (e.g., Transit) to reflect the ***EAMS Requisition ID***.
6. Select the **DELETE** button. The action deletes the item in question.



7. Select the **UPDATE CART** button. This action saves the changes and update the requisition.
8. Select the **CHECKOUT** button. The action routes the requisitioner to the checkout page.

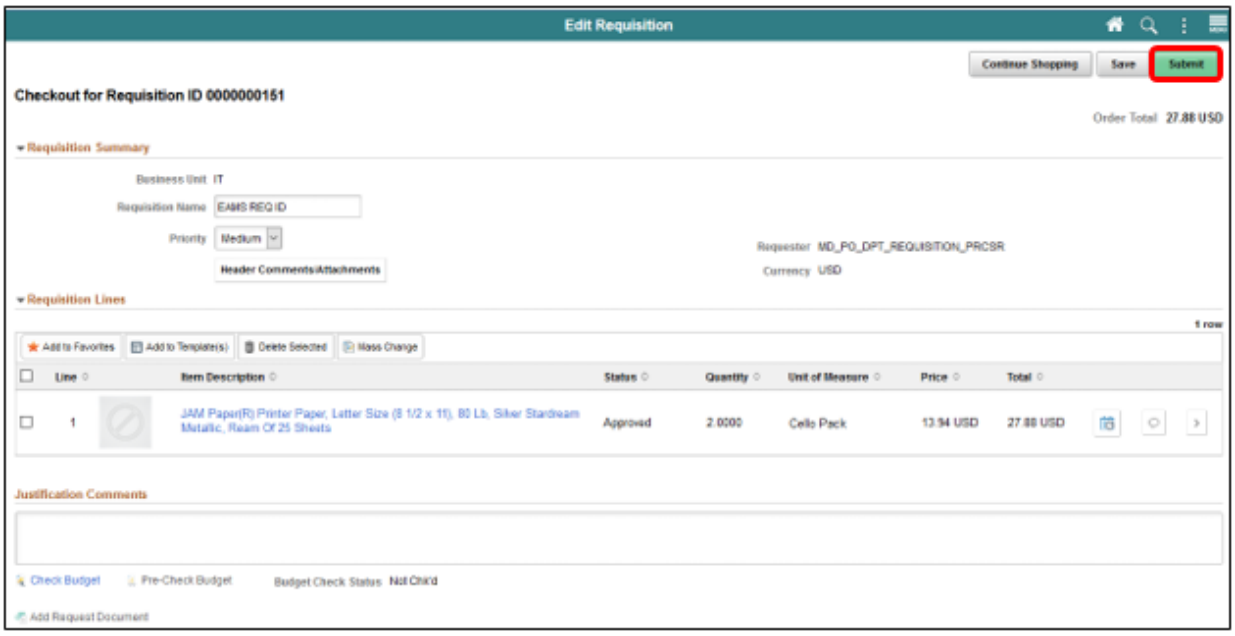


Lesson 2: Manage a Requisition

Lecture 2: Edit a Requisition

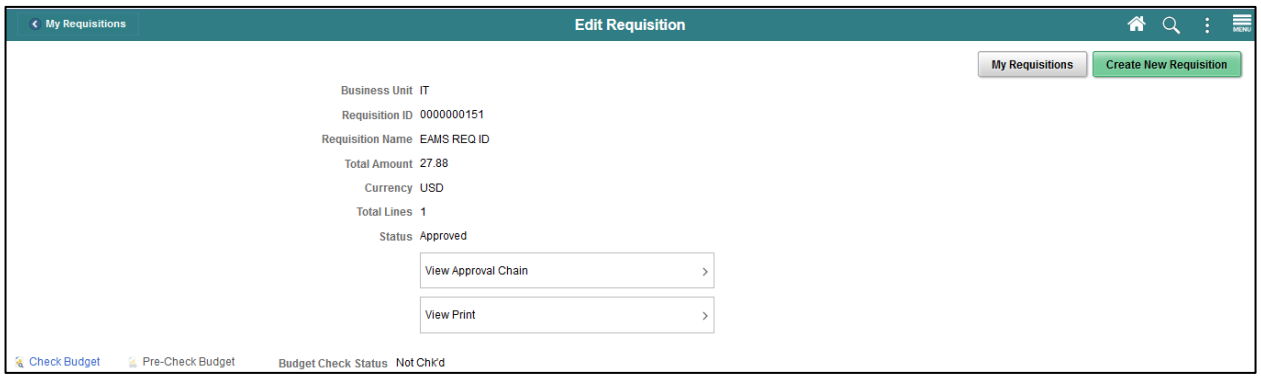
For the purposes of this lecture, it is assumed the requisition header, lines, schedules, and distributions were previously updated.

9. Select the **SUBMIT** button. The system will route the requisitioner to the save confirmation page.



Save Confirmation Page

The Save Confirmation page enables the requisitioner to view a summary of the final requisition. It also provides access to preview the approval workflow and to print the requisition.

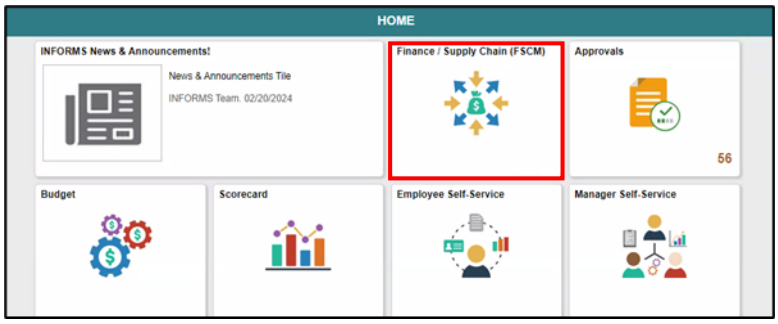


Lesson 2: Manage a Requisition

Lecture 3: View and Print a Requisition

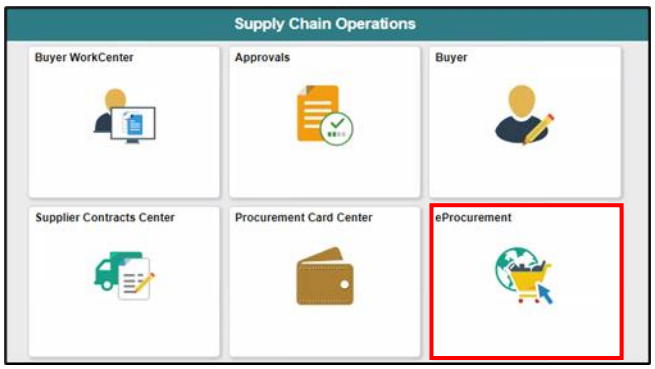
Navigate to **Finance/Supply Chain (FSCM) tile > Supply Chain Operations tile > eProcurement tile > My Requisition tile**

1. Login into **INFORMS** and select the **FINANCE/SUPPLY CHAIN (FSCM).**



2. Select the **SUPPLY CHAIN OPERATION** tile.

3. Select the **ePROCUREMENT** tile.



4. Select the **MY REQUISITION** tile.

Lesson 2: Manage a Requisition

Lecture 3: View and Print a Requisition

Note: Refer to View and Print PDF Requisition job aid for detailed steps.

Common Elements Used in My Requisition

The **FILTER BY** button is used to narrow the such results on the my requisitions page.

The **RELATED ACTIONS** button is used to display the available actions such as:

- Details
- Copy
- View Print
- Budget Check
- Edit

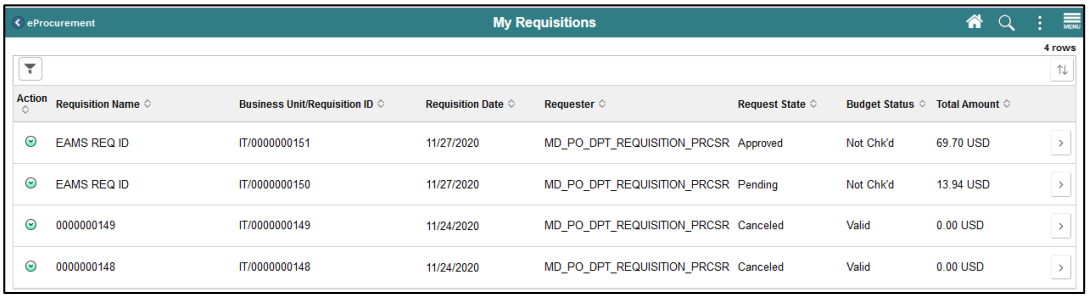
The **VIEW DETAILS** button is used for the Line Details page.

My Requisitions Page

The My Requisitions page is used to view or take action on requisitions created by the requisitioner. The page will display the requisition name, business unit, requisition ID, requester, request state, budget status, and total amount.

Note: A requisitioner may have access to all the related actions; however, this lecture only covers the view print option.

1. Select the **RELATED ACTION** icon. The system then displays the actions menu.
   Note: The requisitioner must select on the related action icon of the requisition to print.



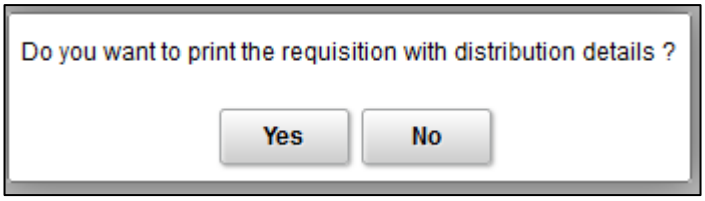
2. Select the **VIEW PRINT** option. The system then displays a prompt for review prior to printing.

Lesson 2: Manage a Requisition

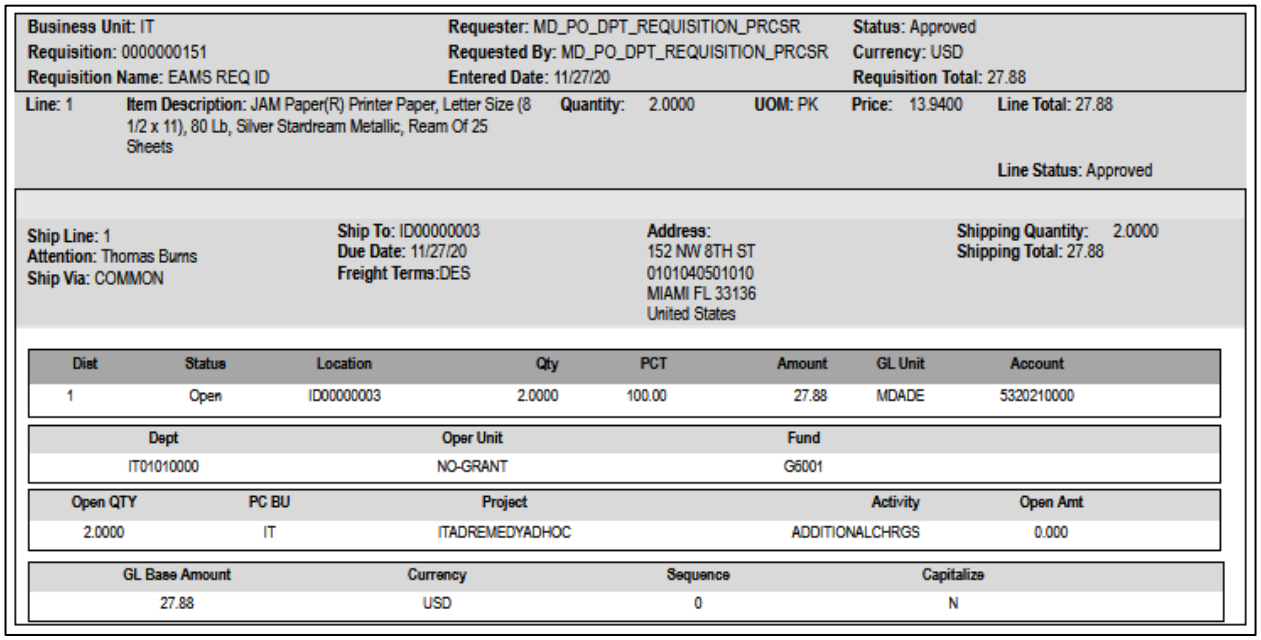
Lecture 3: View and Print a Requisition

The **Distribution Details** option displays previously selected ChartFields on the printed requisition. It is recommended to select YES if the requisition approver requires a hard copy. The requisition approver must validate that the selected ChartFields are correct before final approval. Note that a printed requisition may not substitute for an electronic approval in INFORMS.

3. Select the **YES** button. The system then routes the requisition processor to the printable page and include the ChartFields on the requisition.



4. Depending on the browser, select the **PRINT** option.



Business Unit: IT
Requisition: 0000000151
Requisition Name: EAMS REQ ID
Requester: MD_PO_DPT_REQUISITION_PRCSR
Requested By: MD_PO_DPT_REQUISITION_PRCSR
Entered Date: 11/27/20
Status: Approved
Currency: USD
Requisition Total: 27.88

Line: 1 **Item Description:** JAM Paper(R) Printer Paper, Letter Size (8 1/2 x 11), 80 Lb, Silver Stardream Metallic, Ream Of 25 Sheets **Quantity:** 2.0000 **UOM:** PK **Price:** 13.9400 **Line Total:** 27.88
Line Status: Approved

Ship Line: 1
Attention: Thomas Burns
Ship Via: COMMON
Ship To: ID00000003
Due Date: 11/27/20
Freight Terms:DES
Address:
152 NW 8TH ST
0101040501010
MIAMI FL 33136
United States
Shipping Quantity: 2.0000
Shipping Total: 27.88

Dist	Status	Location	Qty	PCT	Amount	GL Unit	Account
1	Open	ID00000003	2.0000	100.00	27.88	MDADE	5320210000

Dept	Oper Unit	Fund
IT01010000	NO-GRANT	G6001

Open QTY	PC BU	Project	Activity	Open Amt
2.0000	IT	ITADREMEDYADHOC	ADDITIONALCHRGS	0.000

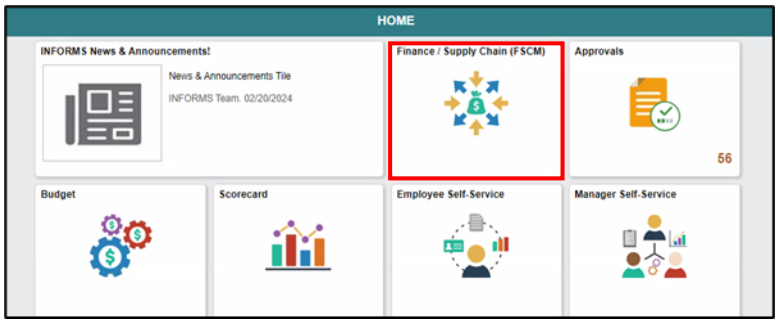
GL Base Amount	Currency	Sequence	Capitalize
27.88	USD	0	N

Lesson 2: Manage a Requisition

Lecture 4: Cancel a Requisition

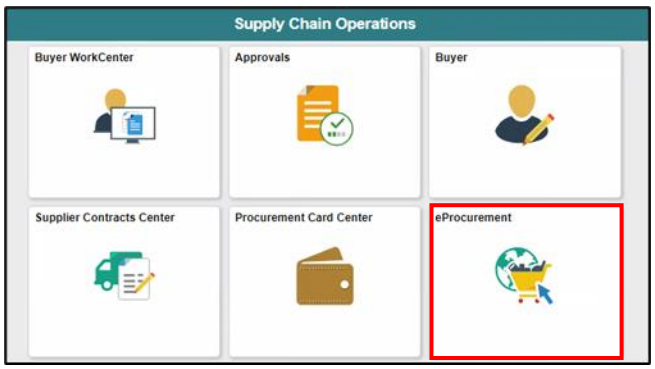
Navigate to **Finance/Supply Chain (FSCM) tile > Supply Chain Operations tile > eProcurement tile > My Requisition tile**

1. Login into **INFORMS** and select the **FINANCE/SUPPLY CHAIN (FSCM).**



2. Select the **SUPPLY CHAIN OPERATION** tile.

3. Select the **ePROCUREMENT** tile.



4. Select the **MY REQUISITION** tile.

Lesson 2: Manage a Requisition

Lecture 4: Cancel a Requisition

Common Elements Used in My Requisition

The **FILTER BY** button is used to narrow the such results on the my requisitions page.
The **RELATED ACTIONS** button is used to display the available actions such as:

- Details
- Copy
- View Print
- Budget Check
- Edit

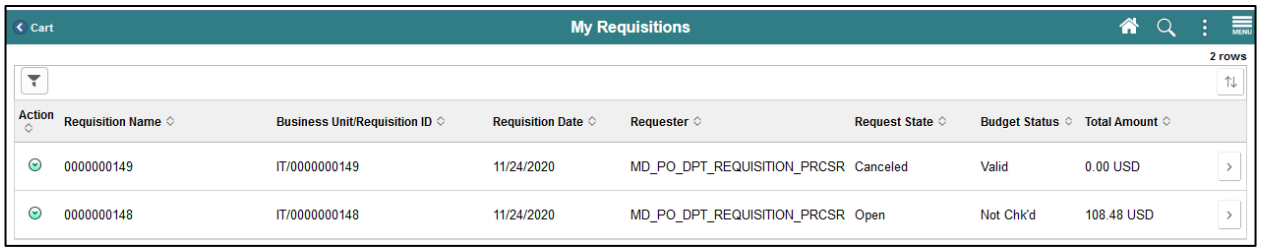
The **VIEW DETAILS** button is used for the Line Details page.

My Requisition Page

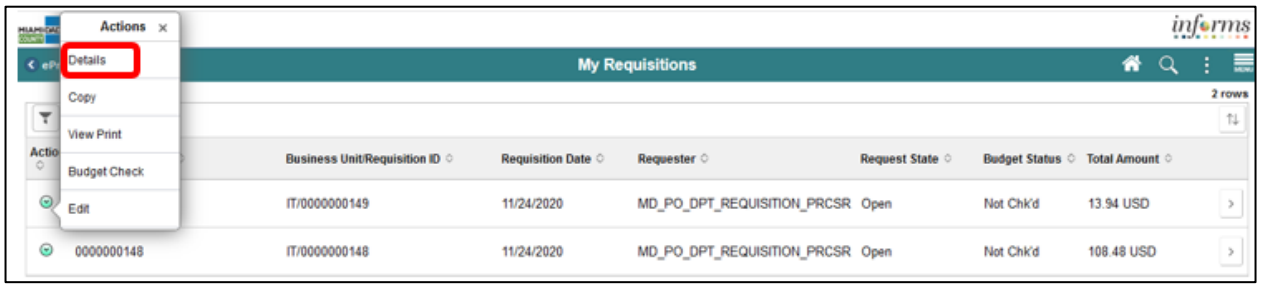
The My Requisitions page is used to view or take action on requisitions created by the requisitioner. The page displays the requisition name, business unit, requisition ID, requester, request state, budget status, and total amount.

Note: A requisitioner may have access to all the related actions; however, this lecture only covers the details option.

1. Select the **RELATED ACTION** icon. The system then displays the actions menu.



2. Select the **DETAILS** option. The system then routes the requisitioner to the line details page.



Lesson 2: Manage a Requisition

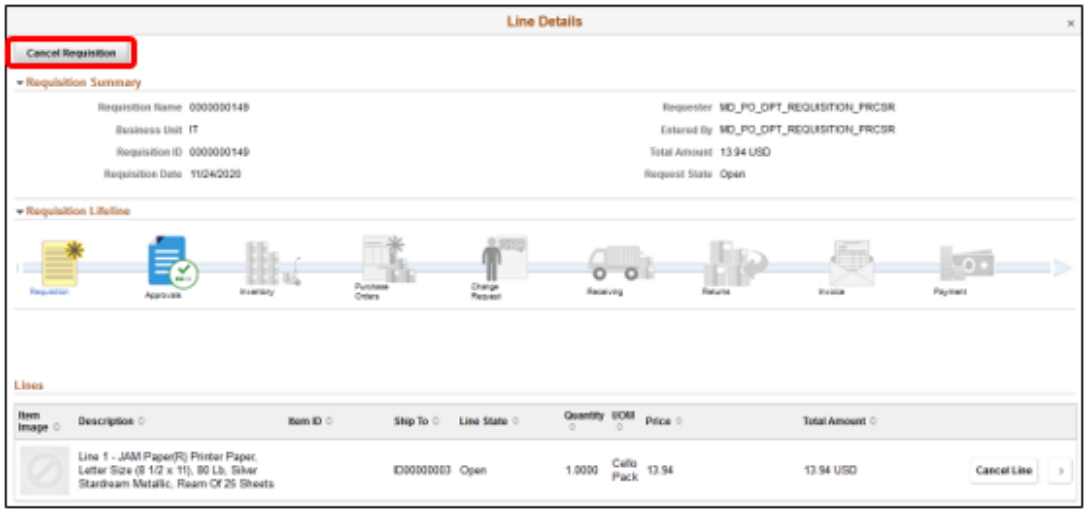
Lecture 4: Cancel a Requisition

Line Details Page

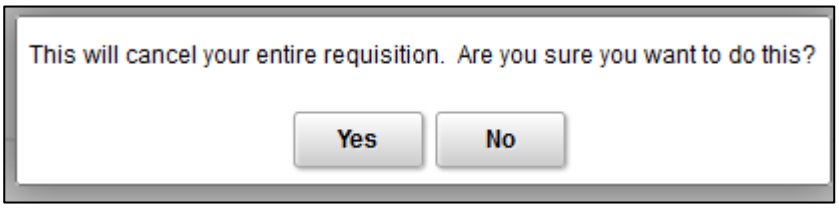
The Line Details page is split into three sections. The requisition summary section displays the requisition header information. Key fields include the business unit, requisition ID, requisition date, total amount, and requisition status. The requisition lifeline section provides a downstream view of the requisition process and highlights its steps. Lastly, the requisition line information section displays item details such as the description, quantity, unit of measure, and price. Also, it provides the requisitioner access to cancel a requisition or requisition lines.

This lecture covers the cancelation of the entire requisition.

3. Select the **CANCEL REQUISITION** button. The system then displays the confirmation prompt.



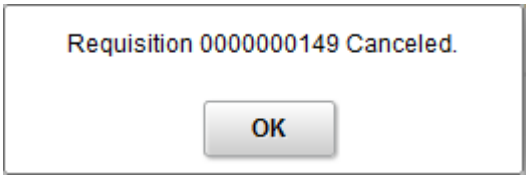
4. Select the **YES** button. The system then displays the confirmation message.
   Note: A canceled requisition cannot be reopened, and is closed permanently. The requisitioner must create a new requisition and submit through the approval process.



Lesson 2: Manage a Requisition

Lecture 4: Cancel a Requisition

5. Select the **OK** button. The system then routes the requisitioner to the line details page.
6.



7. Confirm that the **REQUEST STATE** field reflects "*CANCELED*."

8. Select the **CLOSED** icon. The system then routes the requisitioner to the my requisitions page.

Lesson 2: Lesson Summary

Lesson Summary

Having completed the Manage a Requisitions lesson, users should be able to:

- Copy a Requisition
- Edit a Requisition
- View and Print a Requisition
- Cancel a Requisition

Lesson 3: Approve a Requisition

Lesson 2: Introduction

At the conclusion of the lesson, you should be able to:

- Approve a requisition
- Deny a requisition
- Pushback a requisition
- Hold a requisition

Lesson 3: Approve a Requisition

Key Terms

The following key terms are used in this lesson:

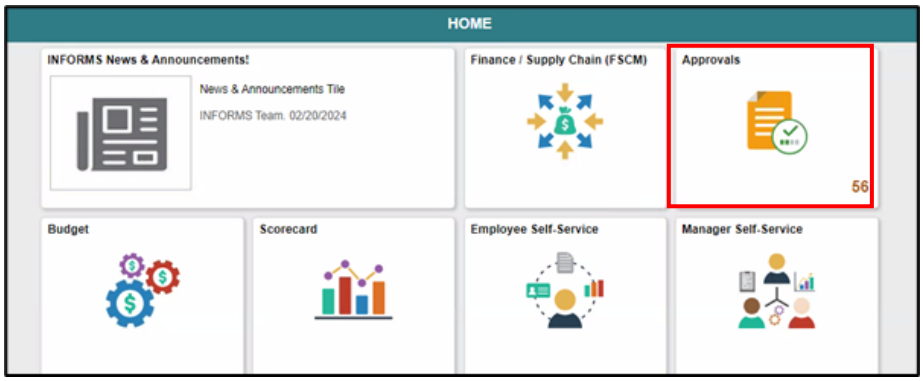
Term	Definition
Pending Approval Page	The Pending Approval Page displays pending requisition header information for the approver to review.
Requisition Header Approval Page	The Requisition Header Approval Page displays the requisition header, lines, and approver comments.
Approval Line Detail Page	The Approval Line Detail Page displays the requisition line and shipping information.
Distribution Page	The Distribution Page is the fourth layer of a requisition used to enter accounting information (ChartFields).

Lesson 3: Approve a Requisition

Lecture 1: Approve a Requisition

Users with the Requisition Approver role will be able to approve requisitions. To approve requistions, users will need to navigate to: **Approvals tile.**

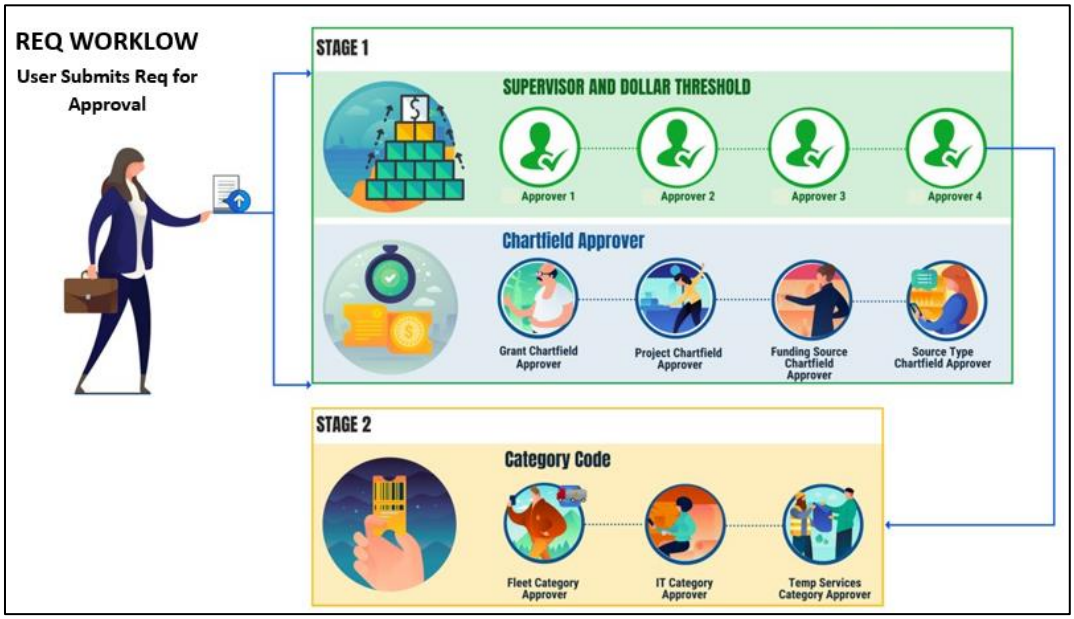
1. Login to INFORMS and select the **APPROVALS** tile.



Lesson 3: Approve a Requisition

Lecture 1: Approve a Requisition

As discussed previously, Miami-Dade County follows a standard approval workflow for requisitions. Specific security roles are assigned to staff by departments based on their delegated authority. The workflow conditions include:



- **Dollar Thresholds**
  - $0 - $24,999.99
  - $25,000.00 - $99,999.99
  - $100,000.00 - $249,999.99
  - $250,000.00 - Above
- **ChartField Approver**
  - Projects
  - Grants
  - GOB
- **Item Category**
  - Information Technology
  - Fleet

Temp Services

Lesson 3: Approve a Requisition

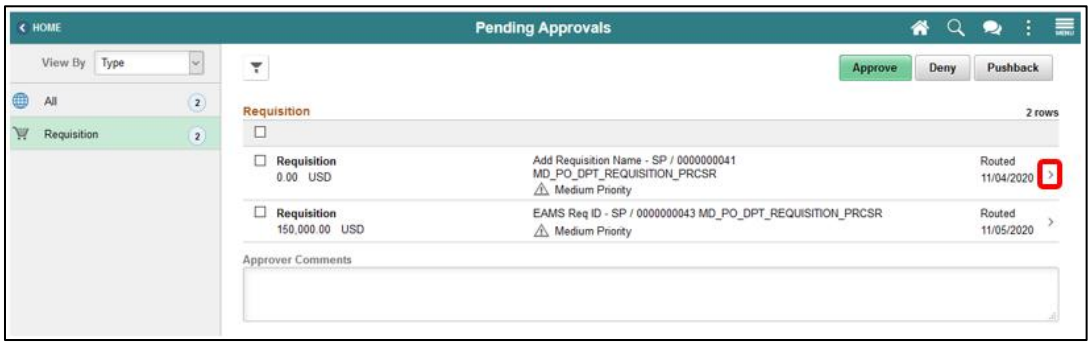
Lecture 1: Approve a Requisition

Pending Approval Page

The Pending Approval Page displays pending requisition header information for the approver to review. The header information includes the transaction total, priority, and requisition name.

Some approvers may have access to approve other supply chain or financial transactions on this page. This lecture only covers the approval of requisitions. Miami-Dade County does not allow approval of mass transactions at the header level.

1. Select the **ALL** button. This action routes the approver to the requisition header approval page.



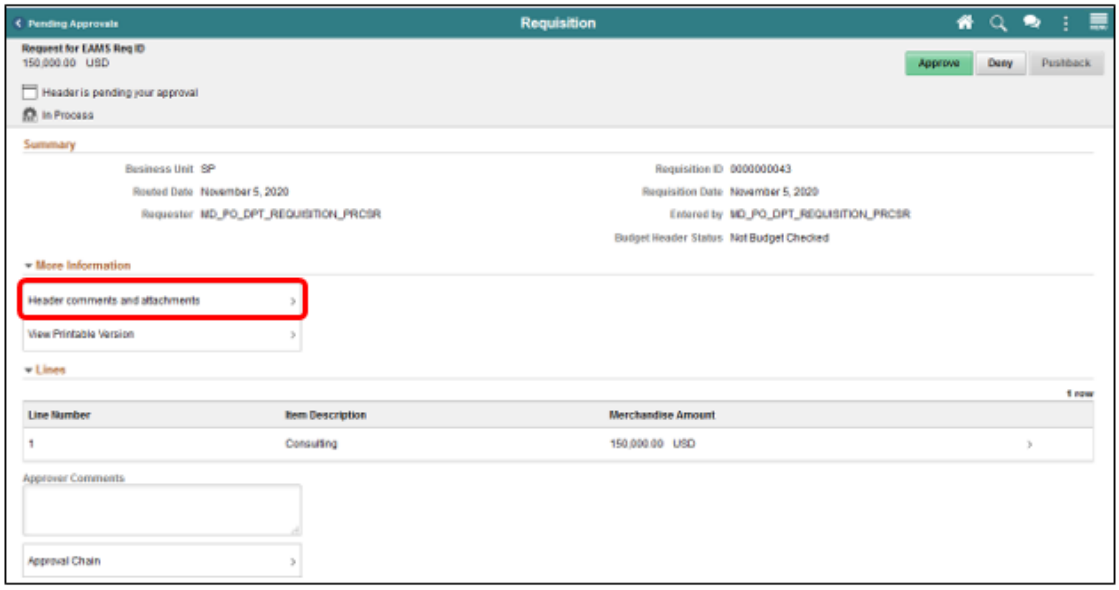
Requisition Header Approval Page

The requisition header approval page displays the requisition header, lines, and approver comments.

Lesson 3: Approve a Requisition

Lecture 1: Approve a Requisition

2. Select the **HEADER COMMENTS AND ATTACHMENTS** button. This action routes the approver to the requisition header comments and attachments page.

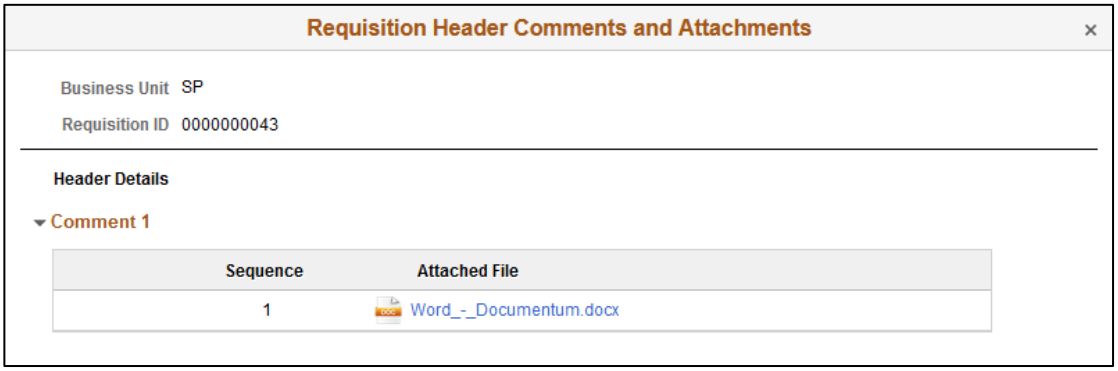


3. Review the comment text submitted by the requisitioner.
4. Select the **ATTACHED FILE** icon for each document that has been attached.

Note: The approver should validate that the market research provided meets the standards set by their respective department's purchasing unit if the requisition requires a sourcing event. This information can be used to develop the event.

5. Select the **CLOSE** button.

The action then routes the user back to the requisition header approval page.

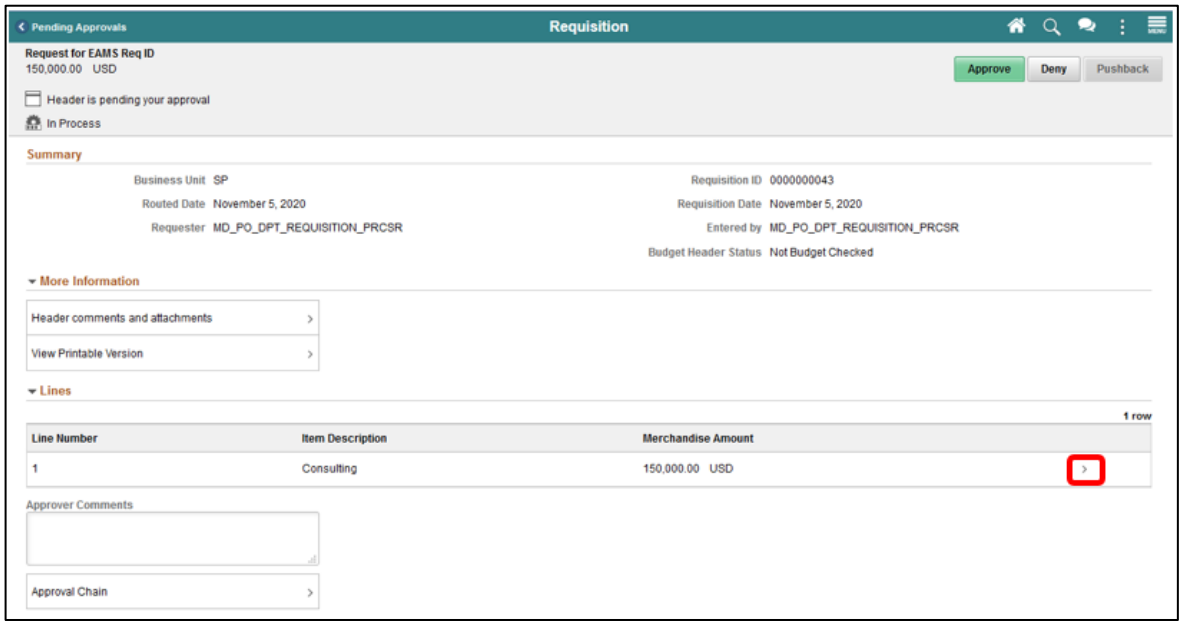


Lesson 3: Approve a Requisition

Lecture 1: Approve a Requisition

6. Select the **MORE** arrow.

This action then routes the user to the approval line detail page.



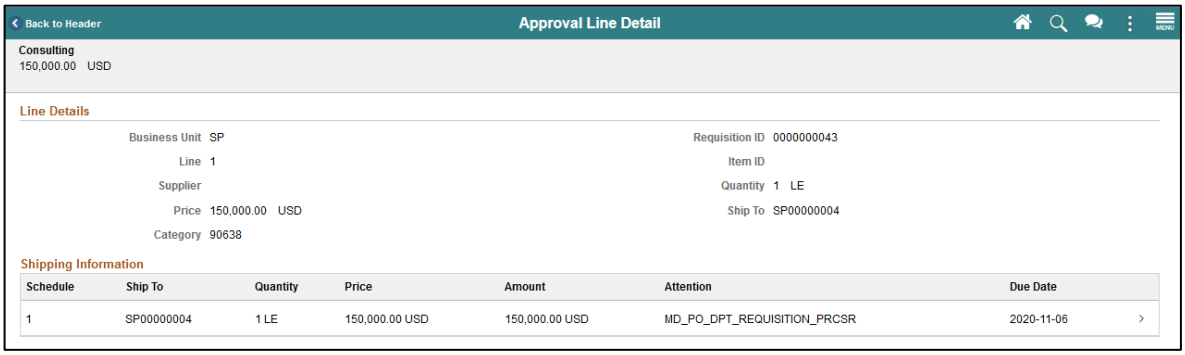
Approval Line Detail Page

The approval line detail page displays the requisition line and shipping information.

7. Review the ***Line Details*** section and confirm that the correct quantities and prices are listed.
8. Review the Shipping Information section and confirm that the **SHIP TO**, **ATTENTION TO,** and **DUE DATE** fields are correct.

Note: A requisition may be sourced to a purchase order and therefore carry over the shipping information. Inaccurate data in this section could have an impact on the receiving process (centralized or decentralized).

9. Select the **MORE** arrow. This action then routes the user to the distribution page.



Lesson 3: Approve a Requisition

Lecture 1: Approve a Requisition

Distribution Page

The Distribution page displays the ChartField entries selected by the requisitioner.

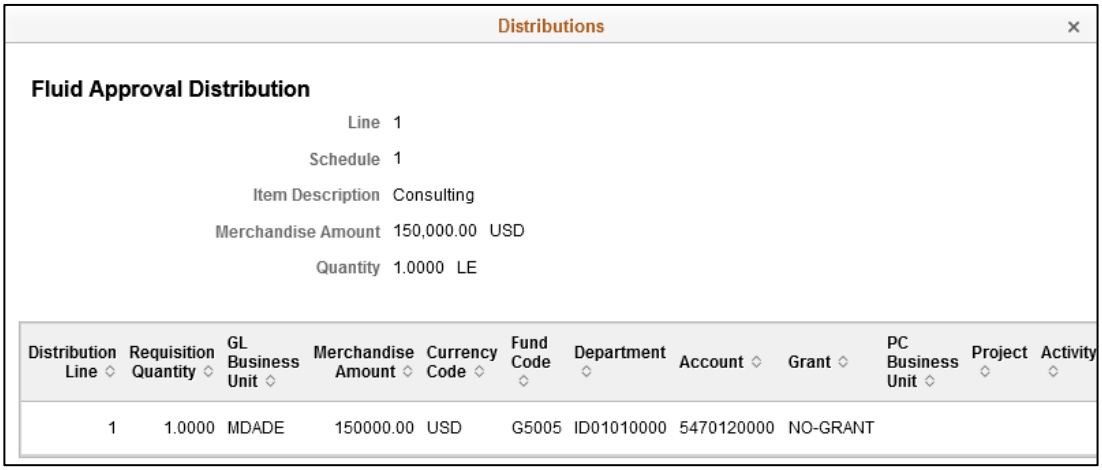
Note: The accounting information entered at the beginning of the procure-to-pay process (requisition) carries over to the purchase order and voucher. It is critical to the process that the correct ChartField values are added (e.g. ensuring that the correct GL Business Unit is selected).

10. Confirm the **FUND CODE** value.
11. Confirm the **DEPARTMENT** value.
12. Confirm the **ACCOUNT** value.
13. Confirm the **GRANT** value.

Note: A requisitioner must enter a grant value if an item is expensed to an active grant. If not, the "**NO-GRANT**" value must be selected.

Note: The following fields are required when expensing an item to an active capital or operational project that has been created in the Project Costing module. The fields remain blank if there are no expenses associated to a project.

14. Confirm the **PC BUSINESS UNIT** value. This field reflects the Business Unit of the requestor.
15. Confirm the **PROJECT** value. This value is created in the Project Costing module.
16. Confirm the **ACTIVITY** value. The activity value represents a subtask in project costing (i.e., Planning, Design).
17. Confirm the **SOURCE TYPE** value. This source type field is used only when a project is GOB funded.
18. Select the **CLOSE** button. The action then routes the user back to the approval line details page.

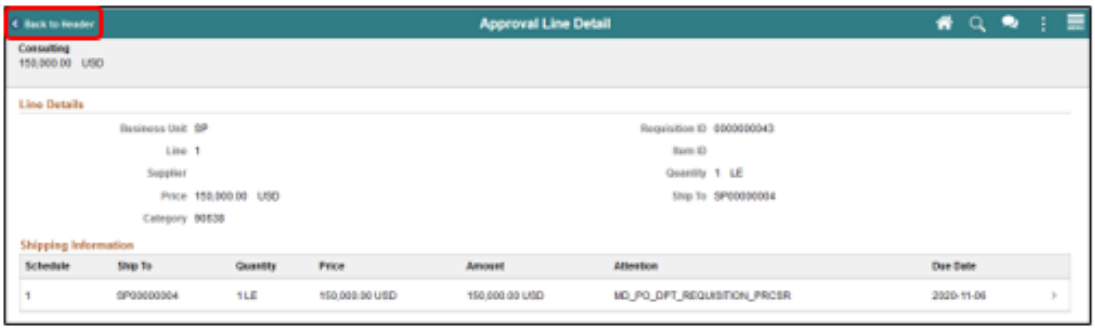


Distribution Line	Requisition Quantity	GL Business Unit	Merchandise Amount	Currency Code	Fund Code	Department	Account	Grant	PC Business Unit	Project	Activity
1	1.0000	MDADE	150000.00	USD	G5005	ID01010000	5470120000	NO-GRANT			

Lesson 3: Approve a Requisition

Lecture 1: Approve a Requisition

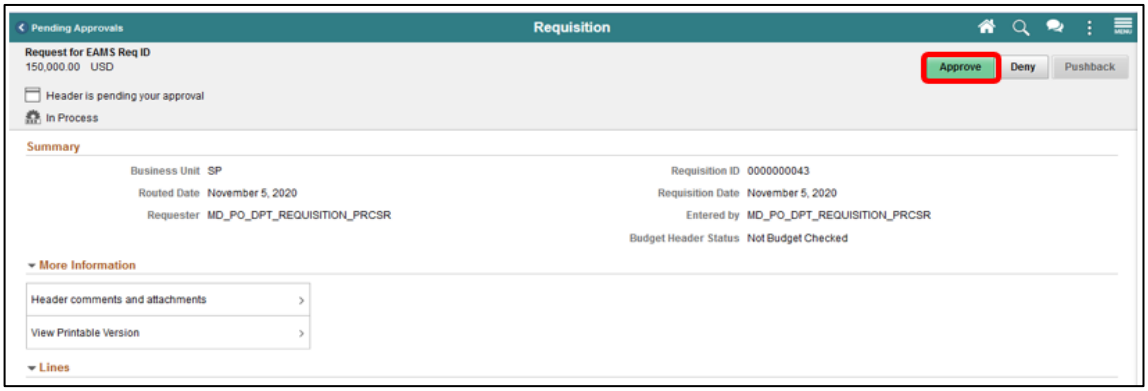
19. Select the **BACK TO HEADER** button. This action then routes the user back to the requisition header approval page.



Requisition Header Page

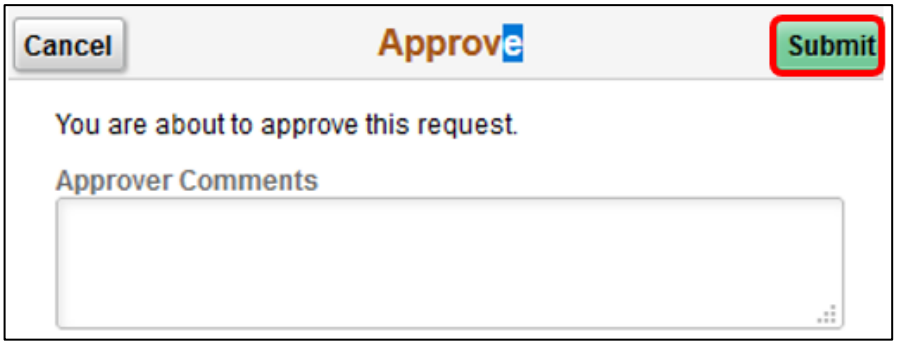
Once all requisition values are reviewed and confirmed:

20. Select the **APPROVE** button. The system then displays the approver comments page.



21. Enter **APPROVER COMMENTS**. These comments are visible to the next approver and the requisitioner.

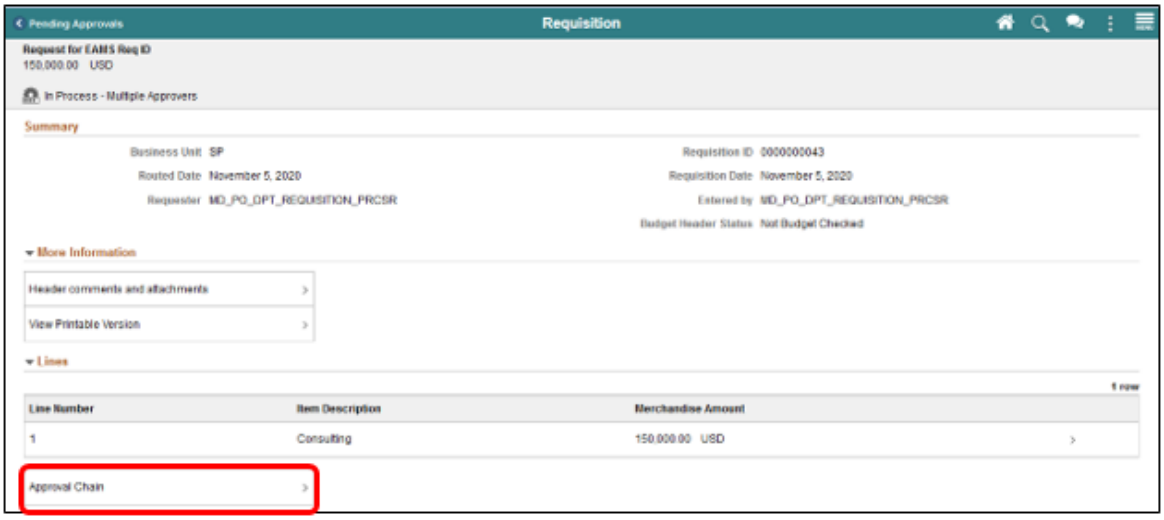
22. Select the **SUBMIT** button. This action then routes the user back to the requisition header page.



Lesson 3: Approve a Requisition

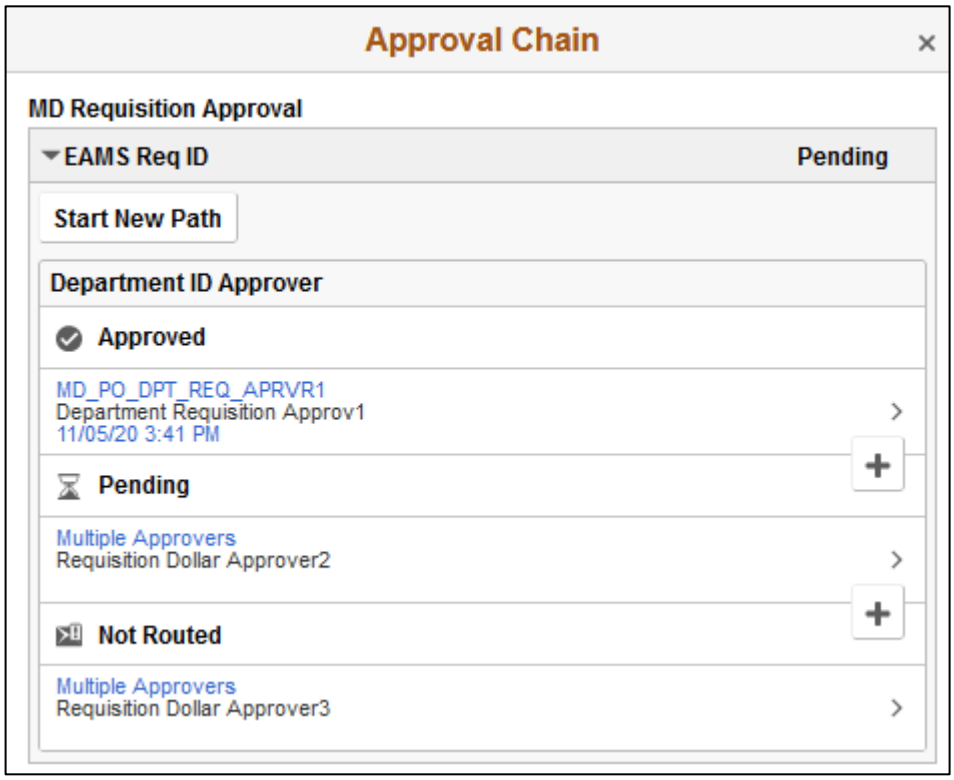
Lecture 1: Approve a Requisition

23. Select the **APPROVAL CHAIN** button. This action routes the user to the approval chain page.



The approval chain page displays the approval path and pending approvals.

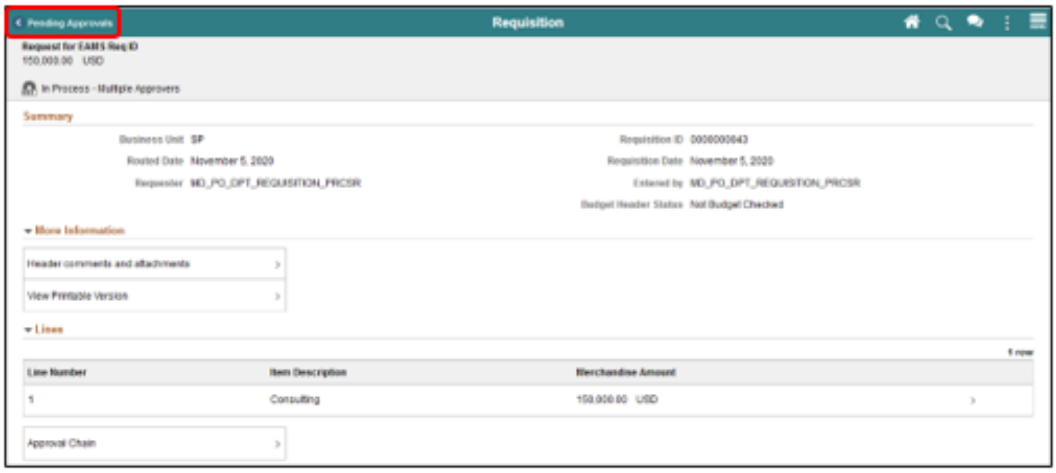
24. Select the **CLOSE** button. This then routes the user back to the requisition header page.



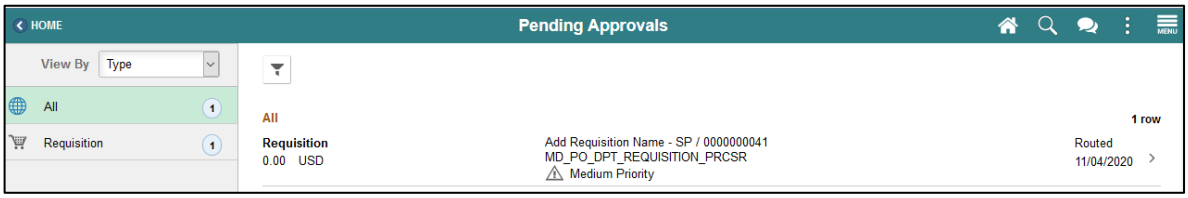
Lesson 3: Approve a Requisition

Lecture 1: Approve a Requisition

7. Select the **PENDING APPROVALS** button. This action routes the user back to the pending approval page.



8. Repeat all the steps discussed until all pending requisitions are approved.

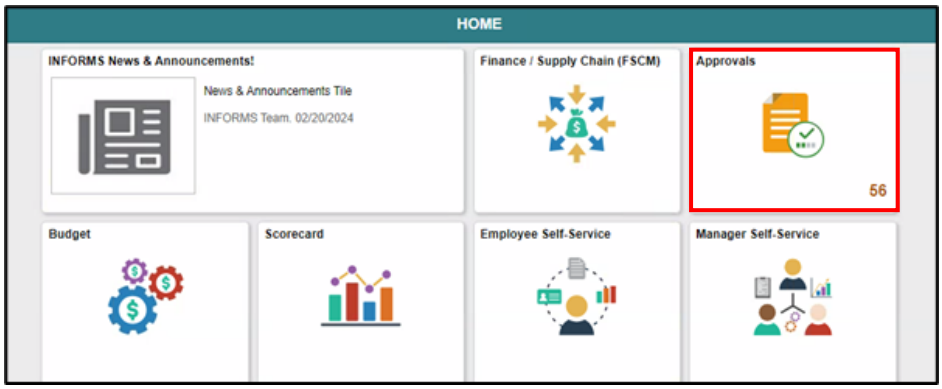


Lesson 3: Approve a Requisition

Lecture 2: Deny a Requisition

Navigate to: **Approvals tile**

1. Login to INFORMS and select the **APPROVALS** tile.

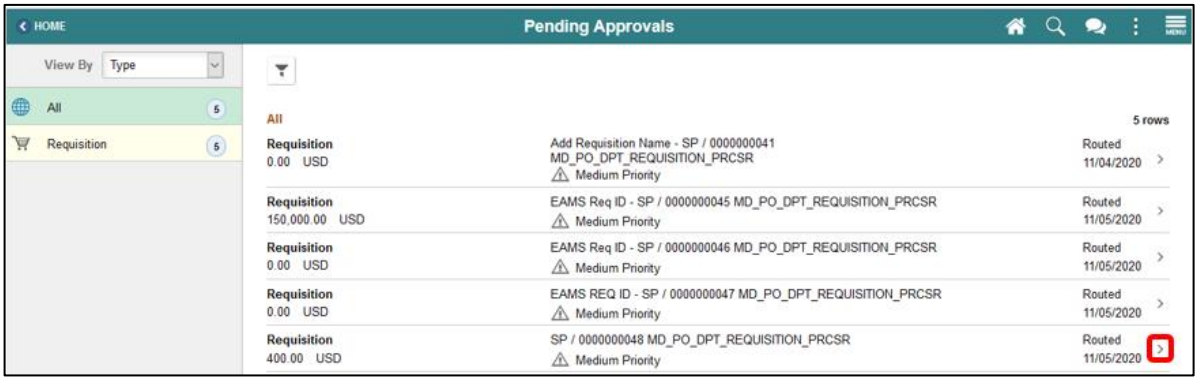


Pending Approvals Page

The pending approval page displays pending requisition header information for the approver to review. The header information includes the transaction total, priority, and requisition name.

Some approvers may have access to deny other supply chain or financial transactions on this page. This lecture only covers the denial of a requisition. Note that Miami-Dade County does not allow users to deny mass transactions at the header level.

1. Select the **ALL** button. This action routes the approver to the requisition header approval page.



Lesson 3: Approve a Requisition

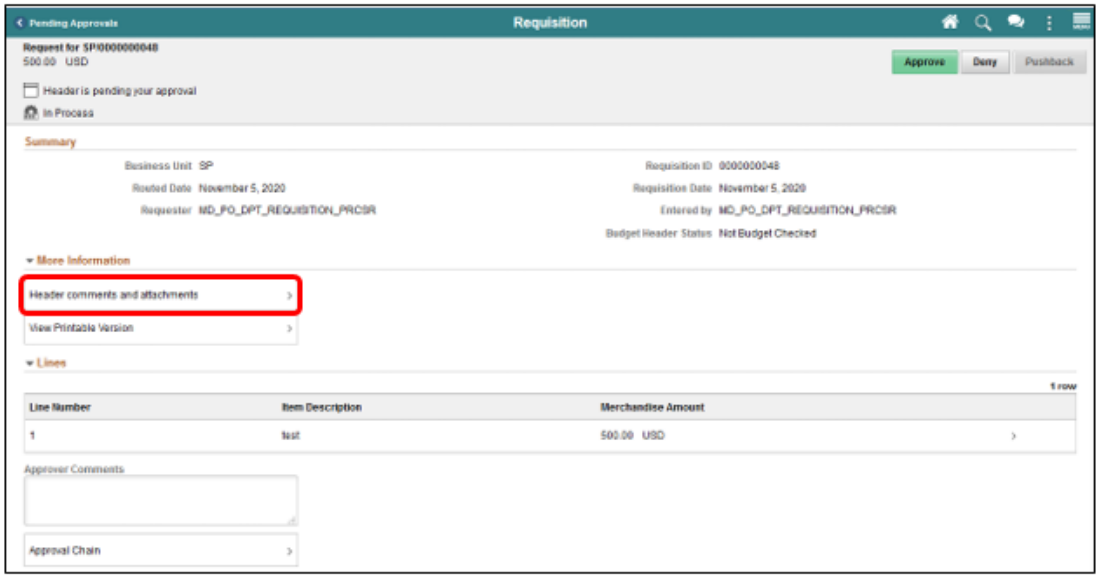
Lecture 2: Deny a Requisition

Requisition Header Approval Page

The requisition header approval page displays the requisition header, lines, and approver comments.

Approvers must review all four layers of a requisition and comments/attachments before the final denial.

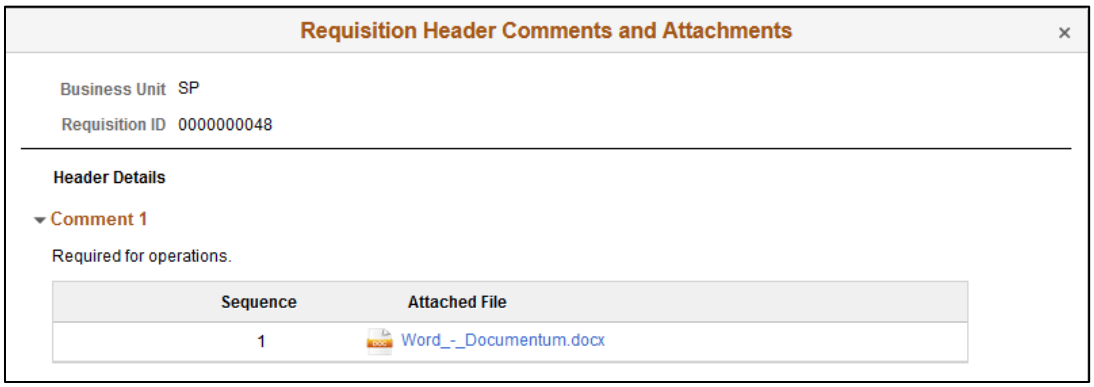
2. Select the **HEADER COMMENTS AND ATTACHMENTS** button. This action routes the approver to the requisition header comments and attachments page.



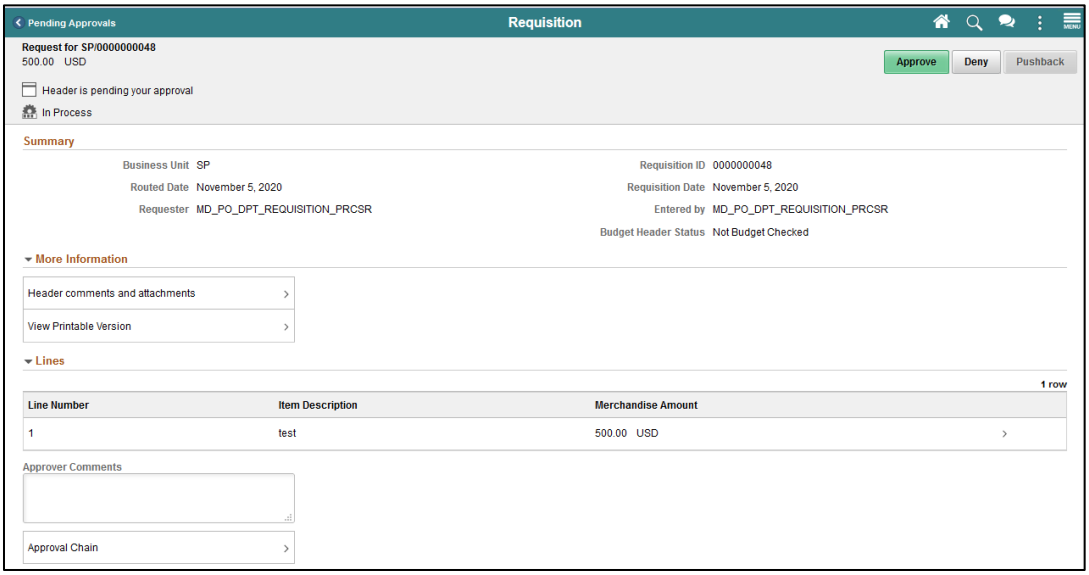
Lesson 3: Approve a Requisition

Lecture 2: Deny a Requisition

3. Review the comment text submitted by the requisitioner.
4. Select the **ATTACHED FILE** icon for each attached document.
   The approver should validate that the market research meets the standards set by their respective department's purchasing unit. If the requisition requires a sourcing event, the attached market research assists the Buyer in developing sourcing event details.
5. Select the **CLOSE** button. The action routes the user back to the requisition header approval page.



6. Select the **MORE** arrow. This action routes the user to the approval line detail page.



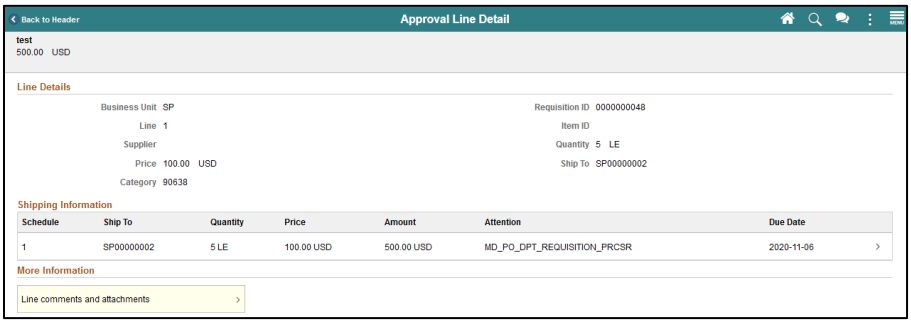
Lesson 3: Approve a Requisition

Lecture 2: Deny a Requisition

Approval Line Detail Page

The approval line detail page displays the requisition line and shipping information.

1. Review the ***Line Details*** section and confirm that the correct **QUANTITY** and **PRICE** are listed.
2. Review the ***Shipping Information*** section and confirm that the **SHIP TO**, **ATTENTION,** and **DUE DATE** fields are correct.
   Note: A requisition may be sourced to a purchase order and therefore carry over the shipping information. Inaccurate data in this section could have an impact on the receiving process (centralized or decentralized).
3. Select the **MORE** button. This action routes the user to the distribution page.



Distribution Page

The distribution page displays the ChartField entries selected by the requisitioner.

Note that accounting information entered at the beginning of the procure-to-pay process (requisition) carries over to the purchase order and voucher. It is critical to the process that the correct ChartField values are selected (e.g. ensuring that the correct GL Business Unit is selected).

4. Confirm the **FUND CODE** value.
5. Confirm the **DEPARTMENT** value.
6. Confirm the **ACCOUNT** value.
7. Confirm the **GRANT** value.

Note: A requisitioner must enter a grant value if this item is expensed to an active grant. If not, the "**NO-GRANT**" value must be selected.

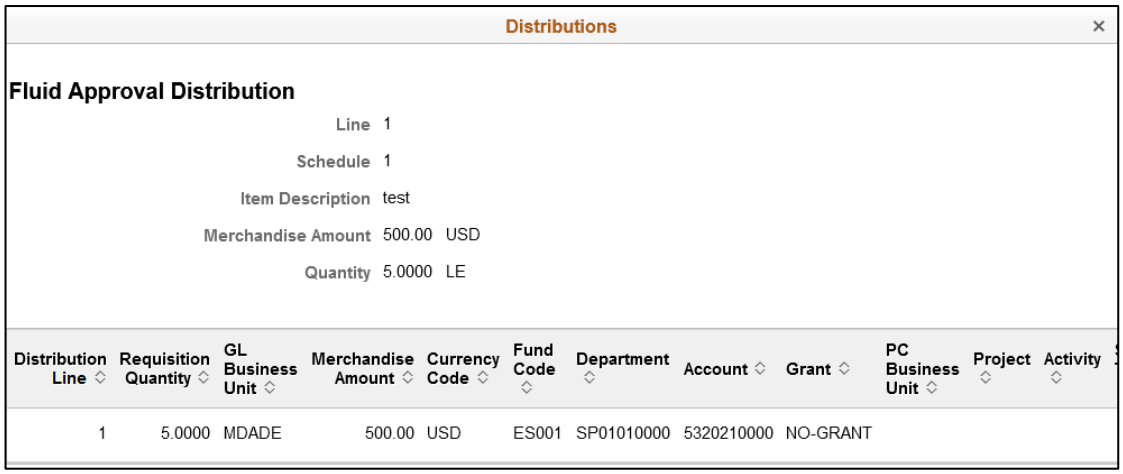
The following fields are required when expensing an item to an active capital or operating project that has been created in the Project Costing module. The requisitioner must leave the fields blank if there are no expense requisition lines to a project.

Confirm the **PC BUSINESS UNIT** value. This field should reflect the requestor's respective business unit.

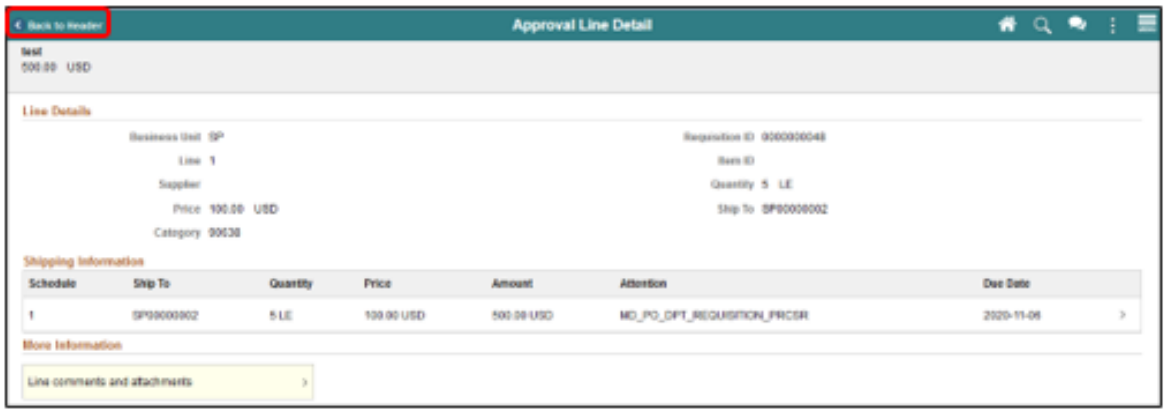
Lesson 3: Approve a Requisition

Lecture 2: Deny a Requisition

7. Confirm the **PROJECT** value. This value is created in the project costing module and must be in an active status.
   Confirm the **ACTIVITY** value. The activity value represents a subtask in project costing (i.e., Planning, Design).
8. Confirm the **SOURCE TYPE** value. The source type field is only be selected when the project is GOB funded.
9. Select the **CLOSE** button. This action routes the approver back to the approval line details page.



10. Select the **BACK TO HEADER** button. This action routes the approver back to the requisition header approval page.

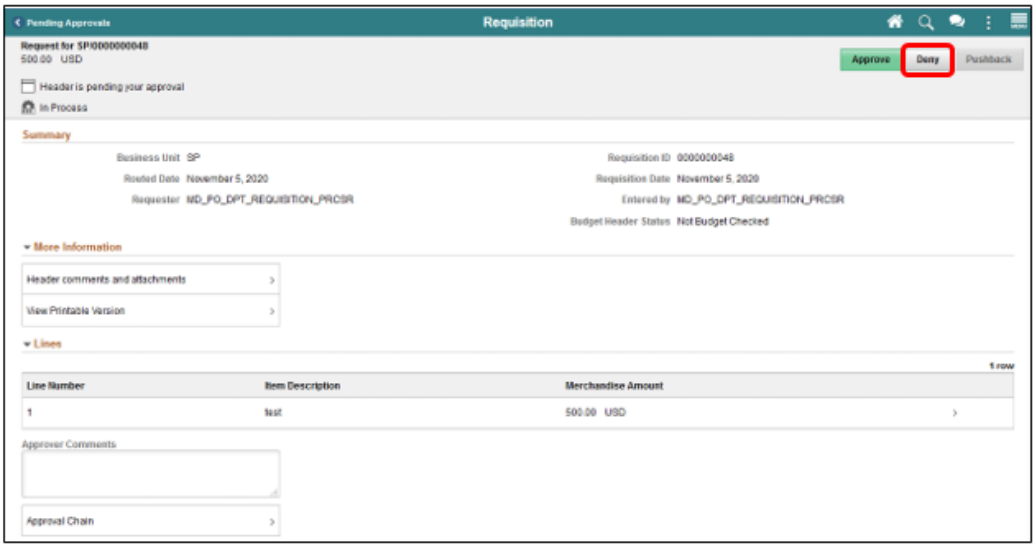


Lesson 3: Approve a Requisition

Lecture 2: Deny a Requisition

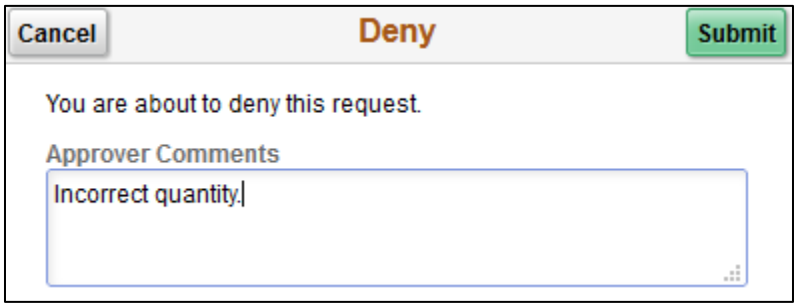
All approvers can deny a requisition. When a requisition is denied, the approval workflow stops regardless of the approval level and sets the transaction back to the requisitioner.

11. Select the **DENY** button. The system then displays the approver comments page.



Note: The requisition approver should enter specific comments explaining the reason for denying the requisition. The approver's comments are visible to the requisitioner.

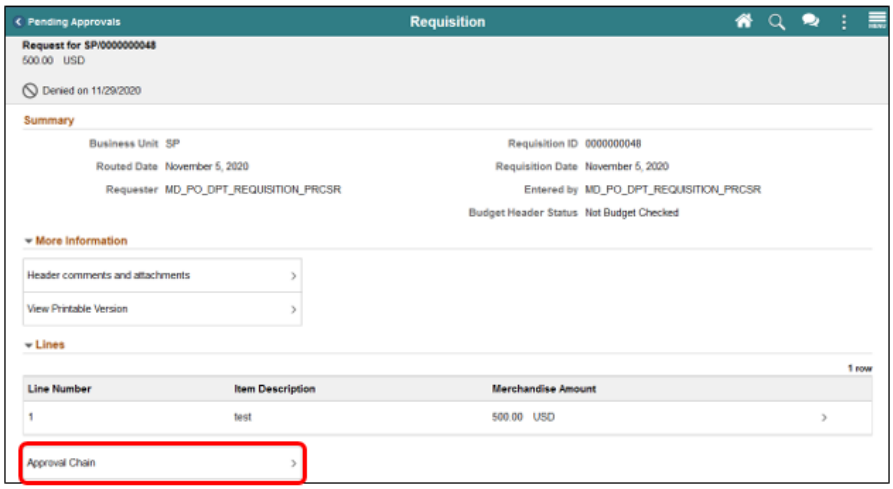
12. Enter approver comments.
13. Select the **SUBMIT** button. This action returns the approver to the requisition header page.



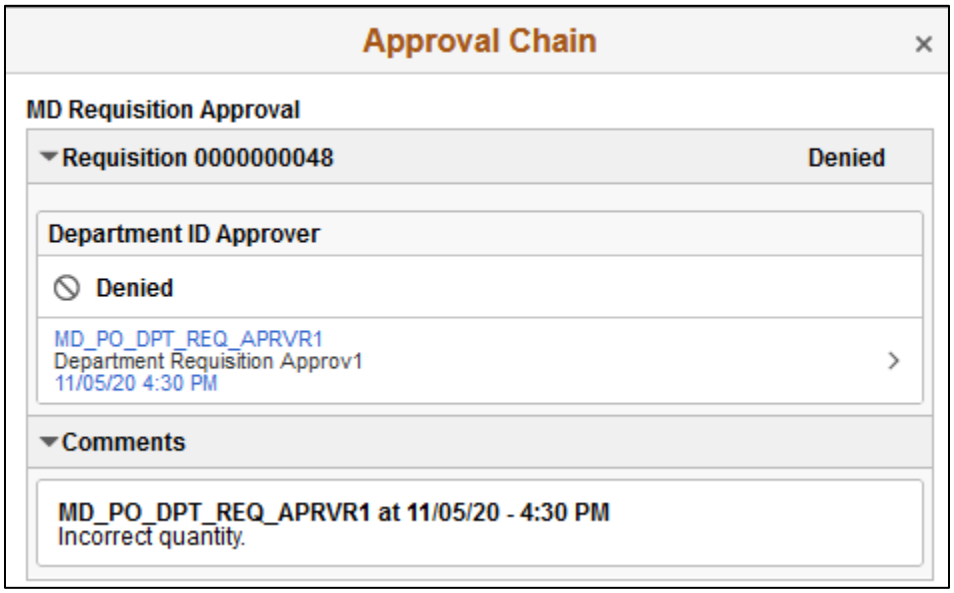
Lesson 3: Approve a Requisition

Lecture 2: Deny a Requisition

1. Select the **APPROVAL CHAIN** button. This action displays the approval chain page.



Note: On this page, the approver can confirm that the requisition approval status was denied.



Lesson 3: Approve a Requisition

Lecture 3: Pushback a Requisition

Navigate to: **Approvals tile**

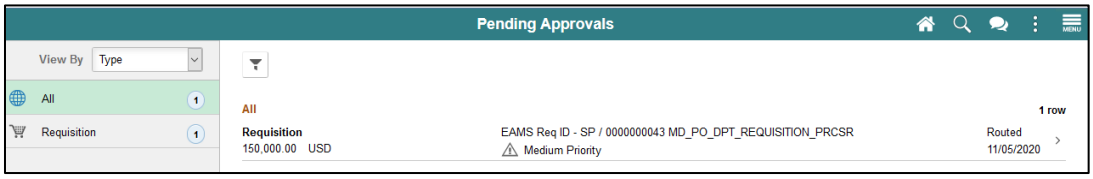
1. Select the **APPROVALS** tile.

Pending Approval Page

The Pending Approval page displays pending requisition header information for the approver to review. The header information includes the transaction total, priority, and requisition name.

Some approvers may have access to other supply chain or financial transactions on this page. This lecture only covers the pushback of a requisition.

2. Select the **ALL** button. This action routes the approver to the requisition header approval page.



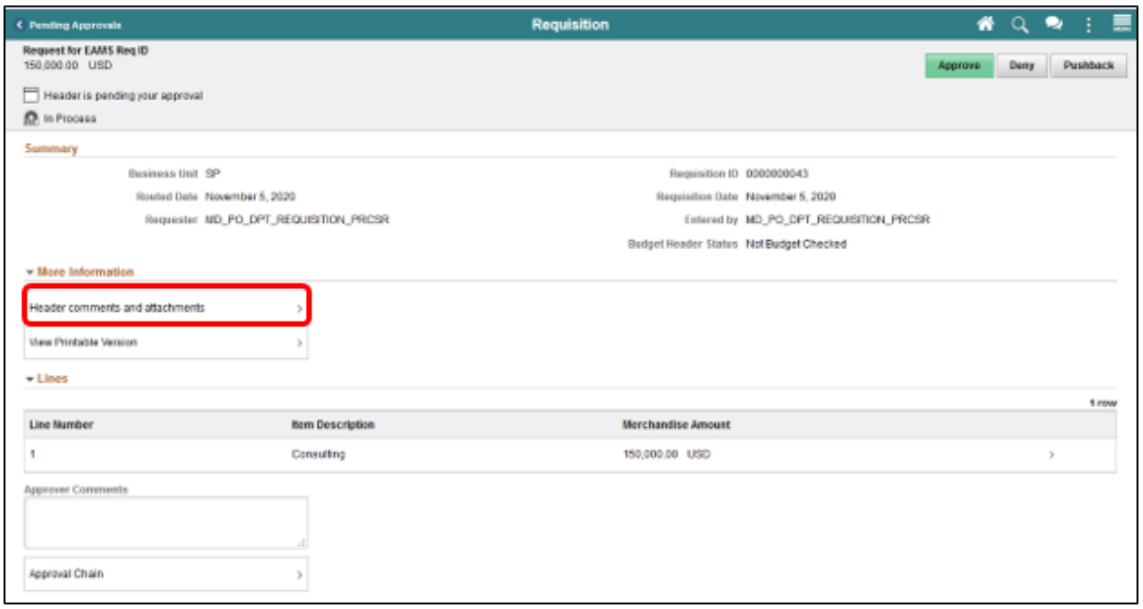
Lesson 3: Approve a Requisition

Lecture 3: Pushback a Requisition

Requisition Header Approval Page

The requisition header approval page displays the requisition header, lines, and approver comments.

3. Select the **HEADER COMMENTS AND ATTACHMENTS** button. This action routes the approver to the requisition header comments and attachments page.



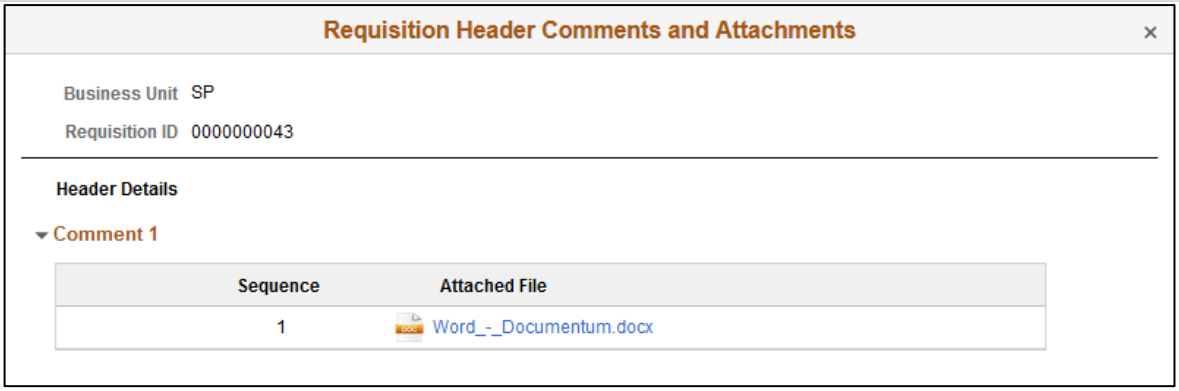
4. Review the comment text submitted by the requisitioner.
5. Select the **ATTACHED FILE** icon for each attached document.

Note: The approver should validate that the market research meets the standards set by their respective department's purchasing unit. If the requisition requires a sourcing event, the attached market research assists the Buyer in developing the sourcing event details.

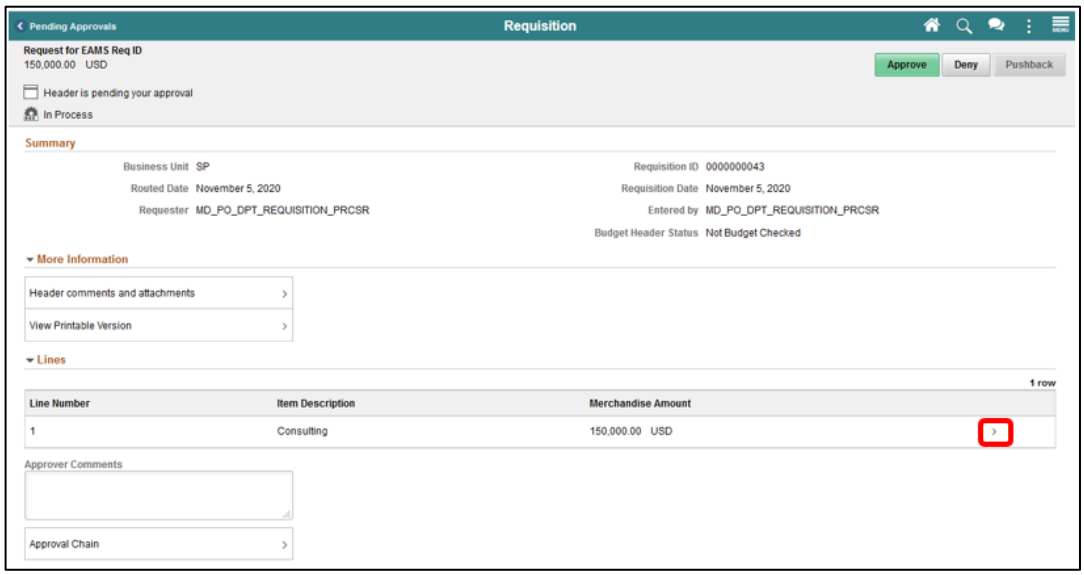
6. Select the **CLOSE** button. The action routes the user back to the requisition header approval page.

Lesson 3: Approve a Requisition

Lecture 3: Pushback a Requisition



1. Select the **MORE** arrow. This action routes the user to the approval line detail page.



Approval Line Detail Page:

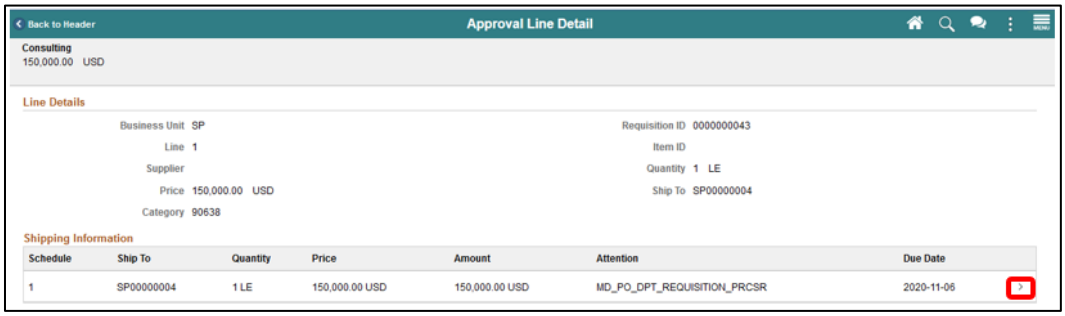
2. The approval line detail page displays the requisition line and shipping information.
3. Review the ***Line Detail*** section and confirm that the correct quantities and prices are listed.
4. Review the Shipping Information section and confirm that the **SHIP TO**, **ATTENTION TO,** and **DUE DATE** fields are correct.

Note: A requisition could be sourced to a purchase order and therefore carry over the shipping information. Inaccurate data in this section may have an impact on the receiving process (centralized or decentralized).

Lesson 3: Approve a Requisition

Lecture 3: Pushback a Requisition

7. Select the **MORE** arrow. This action routes the user to the distribution page.



Distribution Page

The distribution page displays the ChartField entries selected by the requisitioner.

Note: The accounting information entered at the beginning of the procure-to-pay process (requisition) carries over to the purchase order and voucher. It is critical to the process that the correct ChartField values are added (e.g. ensuring that the correct GL Business Unit is selected).

8. Confirm the **FUND CODE** value.
9. Confirm the **DEPARTMENT** value.
10. Confirm the **ACCOUNT** value.
11. Confirm the **GRANT** value.

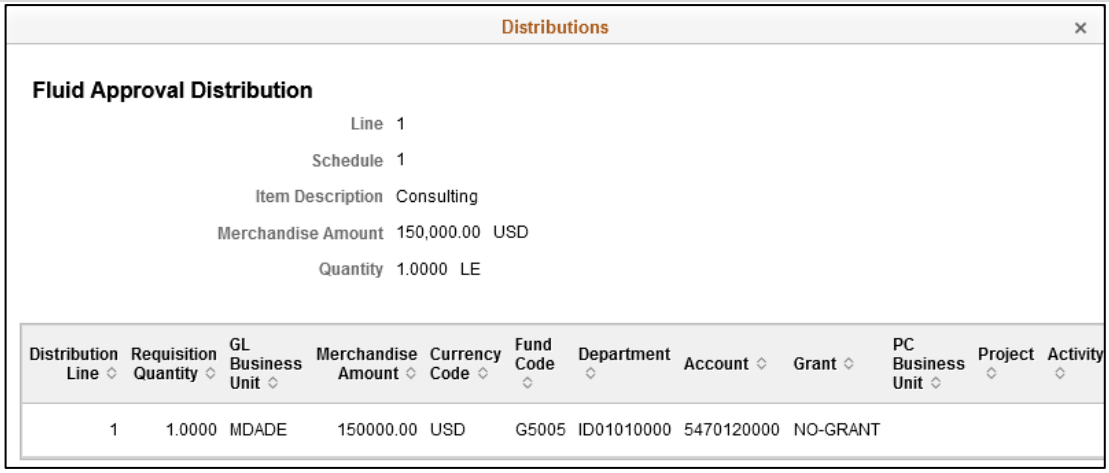
Note: A requisitioner must enter a grant value if the item is expensed to an active grant. If not, the "**NO-GRANT**" value must be selected.

The following fields are required when expensing an item to an active capital or operational project that has been created in the Project Costing module. The fields remain blank if they are not being expensed to a project.

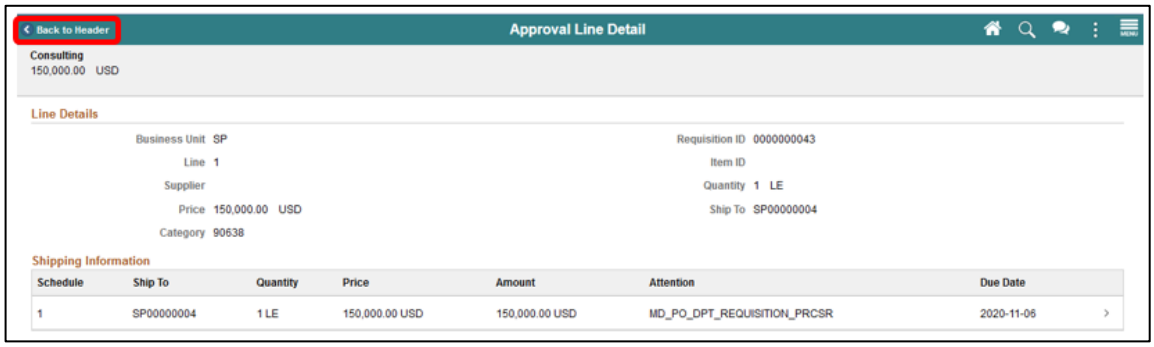
12. Confirm the **PC BUSINESS UNIT** value. This field reflects the Business Unit of the requestor.
13. Confirm the **PROJECT** value. This value is created in the Project Costing module and must be in an active status.
14. Confirm the **ACTIVITY** value. The activity value represents a subtask in project costing (i.e., Planning, Design).
15. Confirm the **SOURCE TYPE** value. The source type field is only used when the project is GOB funded.
16. Select the **CLOSE** button. The action routes the user back to the approval line details page.

Lesson 3: Approve a Requisition

Lecture 3: Pushback a Requisition



21. Select the **BACK TO HEADER** button. This action routes the user back to the requisition header approval page.



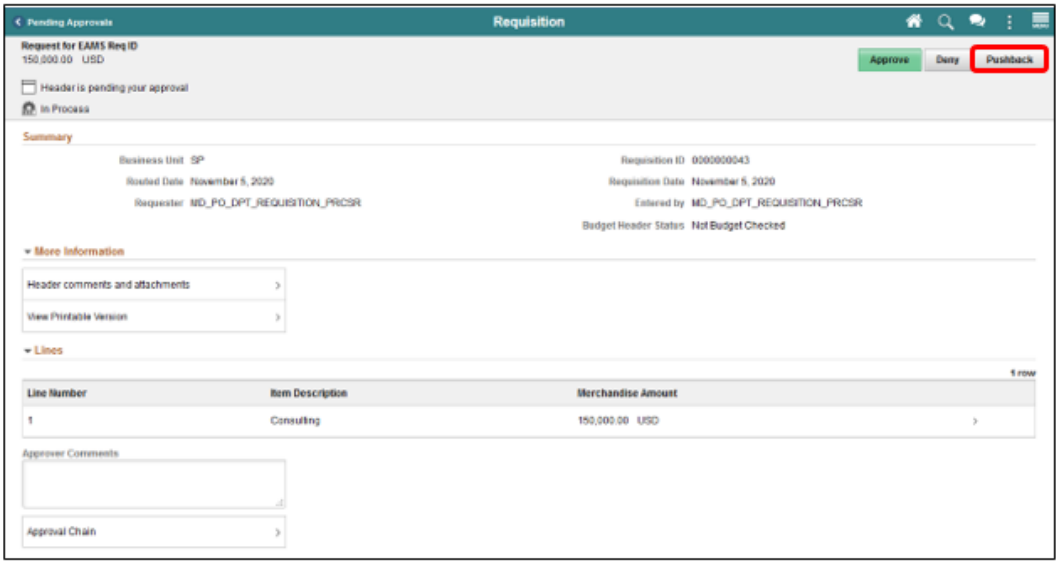
Lesson 3: Approve a Requisition

Lecture 3: Pushback a Requisition

Requisition Header Page

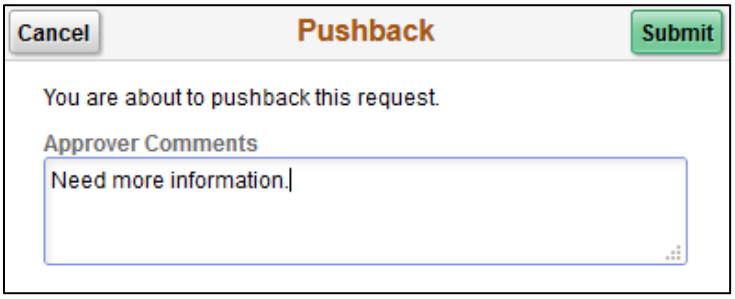
Within INFORMS, only the second, third, or fourth approvers can use the pushback functionality. A pushback action returns the transaction to the previous approval step, requiring the prior approver to reevaluate their authorization. The term "pushback" means an approver is questioning the prior step's approval and is requesting clarification on the transaction before a potential denial of the transaction (which is covered in another lecture).

1. Select the **PUSHBACK** button once all requisition values have been reviewed and confirmed. The system then displays the approver comments page.



Note: The approver should enter detailed comments requesting clarification on transaction specifics.

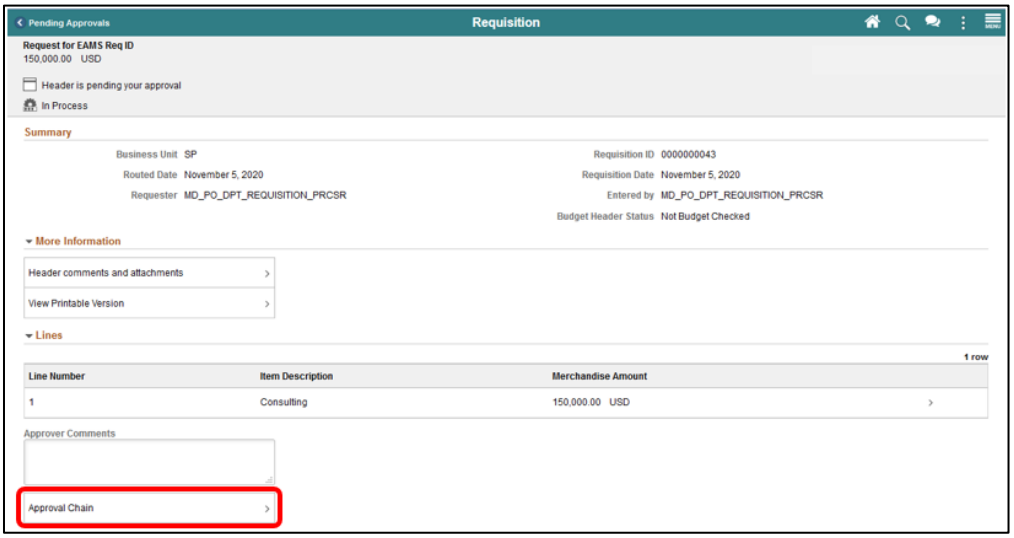
2. Select the **SUBMIT** button. This action then returns the user to the requisition header page.



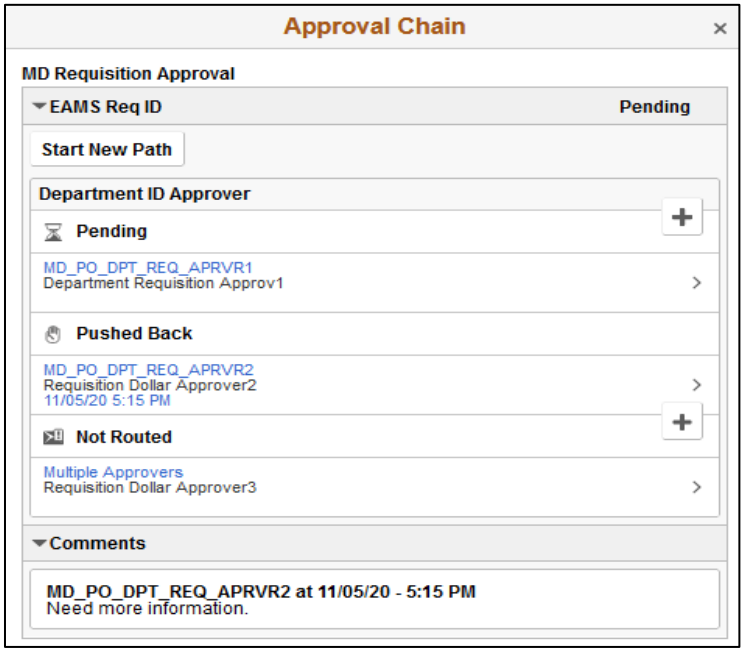
Lesson 3: Approve a Requisition

Lecture 3: Pushback a Requisition

17. Select the **APPROVAL CHAIN** button. This action displays the approval chain page.



Note: On this page, the approver can confirm that their approval status reflects **Push Back**, and the prior approvers status is reverted to **Pending**.



Lesson 3: Approve a Requisition

Lecture 4: Hold a Requisition

Navigation to: **Approvals tile**

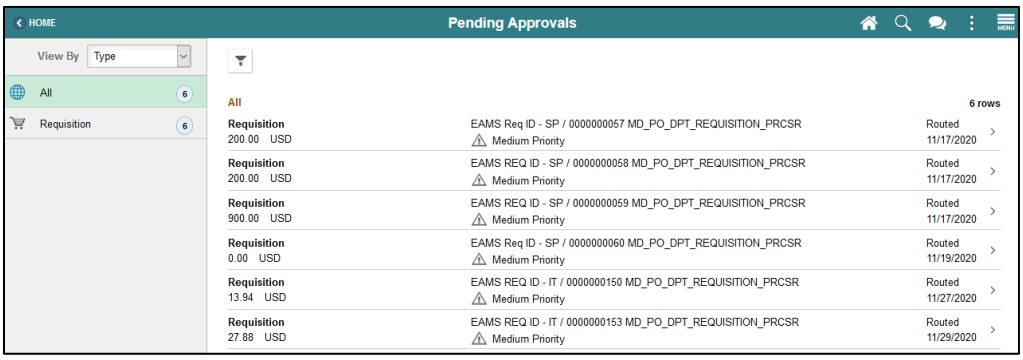
1. Login to INFORMS and select the **APPROVALS** tile.

Pending Approvals Page

The Pending Approvals page displays pending requisition header information for the approver to review. The header information includes the transaction total, priority, and requisition name.

Note: Some approvers may have access to hold other supply chain or financial transactions on this page. This lecture only covers the hold of a requisition. Miami-Dade County does not allow users to hold mass transactions at the header level.

1. Select the **ALL** button. This action routes the approver to the requisition header approval page.



Lesson 3: Approve a Requisition

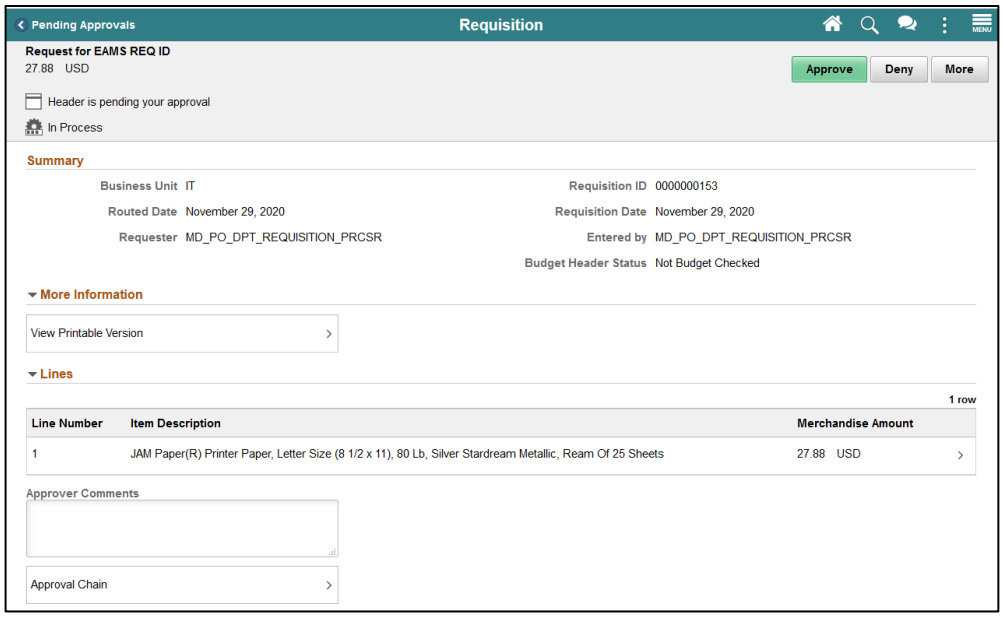
Lecture 4: Hold a Requisition

Requisition Header Approval Page

The requisition header approval page displays the requisition header, lines, and approver comments.

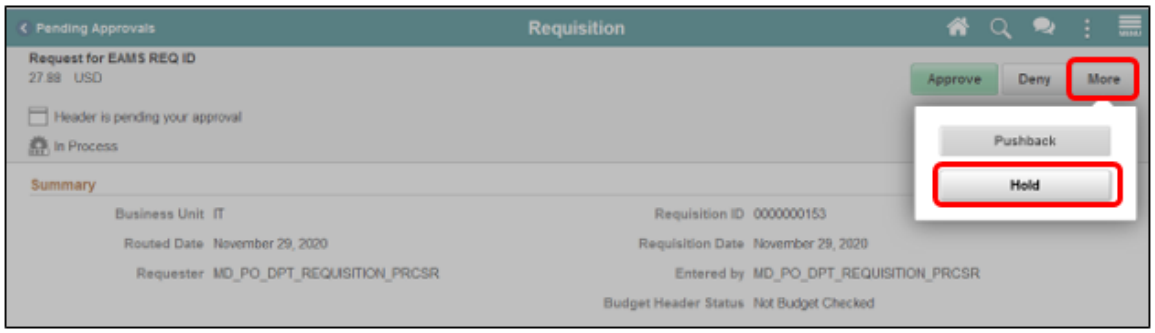
Approvers should review all four layers of a requisition and comments/attachments before acting.

2. Select the **MORE** button. The system then displays the additional approval tasks.



Note: Holding a requisition prevents the approval process from moving to the next approver. Also, when the approver uses the hold action, the system inserts the requisition processor as an ad hoc reviewer at the current approval step, and the approver can request additional information before releasing the hold.

3. Select the **HOLD** button. The system then displays the approver comments page.



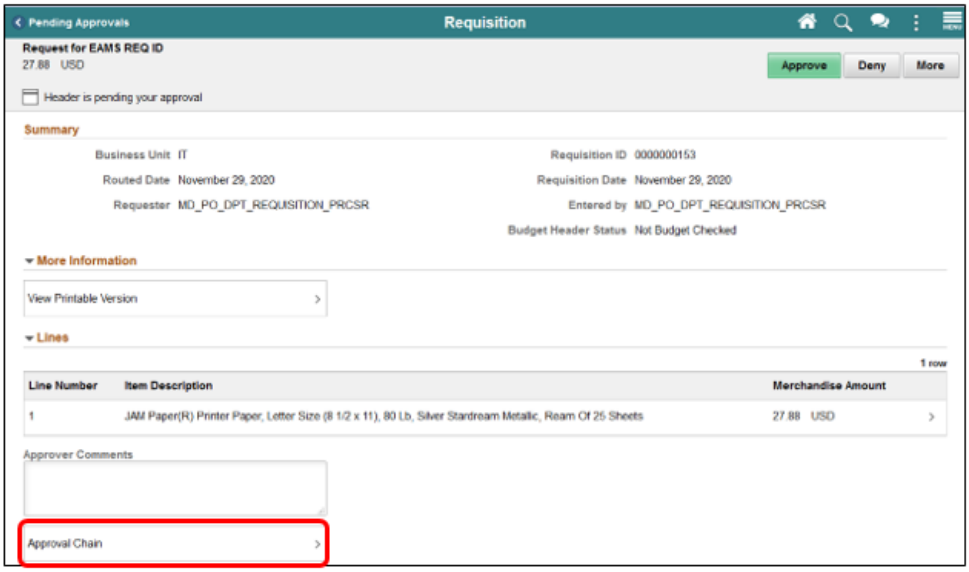
Lesson 3: Approve a Requisition

Lecture 4: Hold a Requisition

Note: The requisition approver should enter detailed comments explaining the reason for holding the requisition. The approver's comments will be visible to the requisitioner.

4. Enter approver comments.
5. Select the **SUBMIT** button. This action returns the approver to the requisition header page.

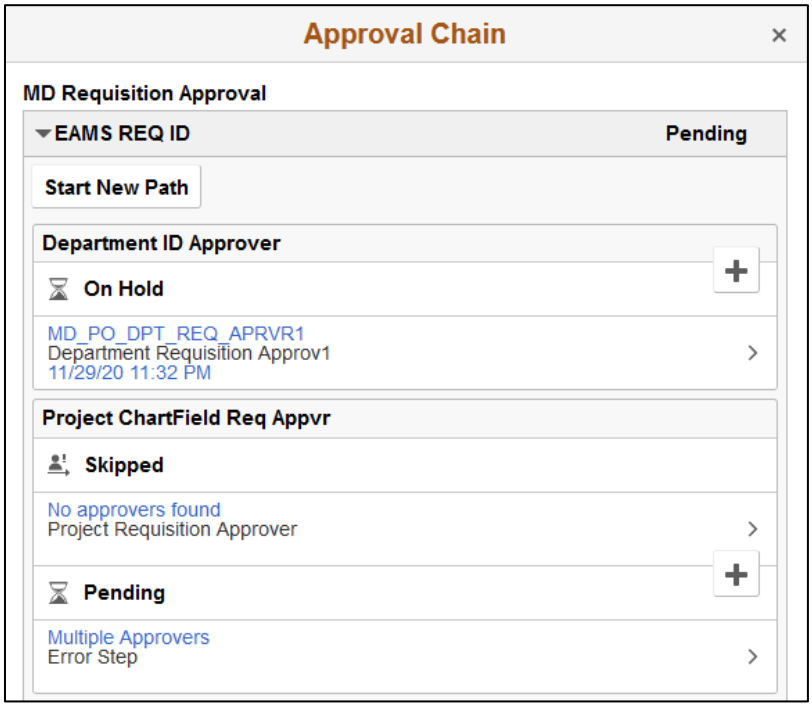
6. Select the **APPROVAL CHAIN** button. This action displays the approval chain page.



Lesson 3: Approve a Requisition

Lecture 4: Hold a Requisition

The approver should confirm that the requisition approval status is set to On Hold.



Lesson 3: Approve a Requisition

Lesson Summary

Having completed the Approve a Requisition lesson, you should be able to:

- Approve a Requisition
- Deny a Requisition
- Pushback a Requisition
- Hold a Requisition

Module 3: Guide Summary

Guide Summary

The Guide Summary module covers two topics:

- Content Summary
- Additional Training and Job Aids

Module 3: Summary

Objectives Achieved

You have completed the Manage and Record Requisitions guide. You now should be able to:

- Create a Requisition
- Manage a Requisition
- Approve a Requisition

Module 3: Summary

Additional Training and Job Aids

Other training materials, related to this topic, include:

- SCM 201 – Manage and Record Requisitions
- SCM 202 – Manage and Record Purchase Orders
- SCM 203 – Record Receipt of Goods and Services
- SCM 205 – Departmental Supplier Contract Management
- SCM 206 – Grantor Management
- SCM 301 – Central Supplier Contract Management
- FIN 303 – Central Supplier Management

You also have the following resources available to you:

- SCM 201 - Manage and Record Requisitions Job Aid
- View and Print PDF Requisitions Job Aid

For additional information, be sure to visit:

- Miamidade.gov/informs

Module 3: Summary

Key Terms

The following key terms are used in this guide:

Term	Definition
Approval Line Detail Page	The Approval Line Detail Page displays the requisition line and shipping information.
Attention To	The person the goods or services are delivered to.
Business Unit	Business Units are defined for each entity and used to maintain and report on transactional data.
Catalog	Displays all active NIGP items that can be selected to add to a requisition.
Category	Classifies asset by type for accounting entry and reporting.
ChartField	A term to represent the chart of accounts, often used to reference a specific field within the chart of accounts (i.e., Fund, Account, Dept ID).
Checkout Page	The last step before submitting a requisition for approval.
Distribution Page	The Distribution Page is the fourth layer of a requisition used to enter accounting information (ChartFields).
Due Date	The date the requester anticipates receipt of the goods or service.
Edit Requisition Page	The Edit Requisition Page enables the requisitioner to make changes to a requisition.
eProcurement	The purchasing module that provides several ways for sourcing items to a requisition.
Express Item Entry	A requisition method that allows requisitioners to quickly add items to a requisition using a streamlined online template.
Favorites	A user's personal list of navigation shortcuts.
Fund Code	The primary structural units of Education and Government accounting. ChartFields are self-balancing due to Fund Codes capturing sources of revenue/expenses.

Module 3: Summary

Key Terms

The following key terms are used in this guide:

Term	Definition
Item Catalog	Facilitates selection of goods and services maintained in the Item Master table from a catalog during the creation of a requisition.
Item ID	The unique system identifier for an item.
Items Detail Page	The Items Detail Page displays item descriptions, negotiated prices, and availability of all items that meet the selected item category.
Line Details Page	The Line Details Page is used to verify and edit additional details for a line.
Manufacturer Item ID	Displays the EAMS Manufacturer ID. This field is required for EAMS and INFORMS integration.
My Requisitions Page	Used to view or act on requisitions created by the requisitioner.
National Institute of Government Purchasing (NIGP) Code	A standard taxonomy for classifying goods and services which facilitates conducting in-depth analysis of spending to inform sourcing strategies and improve buying efficiency.
Pending Approval Page	The Pending Approval Page displays pending requisition header information for the approver to review.
Product Details Page	The Product Details Page provides item attributes such as the product description and specifications.
Punchout	The process of leaving a requisition to access the County catalog to pull the items into a requisition for processing and sourcing to a Purchase Order.
Requestor	A user that needs to procure goods or services.
Requisition Header Approval Page	The Requisition Header Approval Page displays the requisition header, lines, and approver comments.

Module 3: Summary

Key Terms

The following key terms are used in this guide:

Term	Definition
Requisition ID	This field is a system generated number associated with a requisition.
Requisition Lines Section	Also known as the “Line,” and the second layer of a requisition, the requisition lines section displays item details, adds functionality, and provides access to other requisition layers.
Requisition Lines	Also known as the "Line," and the second layer of a requisition, requisition lines display item details, adds functionality, and provides access to other requisition layers.
Requisition Name	Displays a description of the request to help identify a requisition as it flows through the system. Certain departments use this field to reflect the EAMS Requisition ID. If the field is left blank, the system uses the requisition ID as the name.
Requisition Summary	Also known as the “Header” and the first layer of a requisition, the Requisition Summary displays default values from the requisitioner’s user profile (i.e., business unit, requestor, and currency).
Requisition	An internal INFORMS document for requesting goods and services. This is a formal transaction that informs the purchasing department on what to order, how much to order, when the order is needed, as well as other relevant information. Requisitions consist of these basic elements: headers, lines, schedules, and distributions. Each requisition has one header, which can have multiple lines. Each line can have multiple schedules. Each schedule can have multiple distributions. The schedule defines when and where users want the line items delivered. The distribution defines internal information for the schedule, such as how to charge accounts and departments for the purchase, including how much of the total price each department pays.
Requisitioner	A user that enters a requisition into INFORMS. Users with this role can create a requisition for themselves or on behalf of another Requestor within their department.

Module 3: Summary

Key Terms

The following key terms are used in this guide:

Term	Definition
Save Confirmation Page	The Save Confirmation Page enables the requisitioner to view a summary of the final requisition.
Schedule Detail Page	The Schedule Detail Page is the third layer of a requisition and is used to review and modify schedule details for an item.
Search Results Page	The Search Results Page displays all items that meet a submitted search criteria.
Ship To	The department location where the supplier will ship the order.
Shopping Cart Page	The Shopping Cart Page enables the requestor to review and update the shopping cart before proceeding to the checkout page.
Special Request	A method that allows requisitioners to enter item descriptions for goods or services that are unavailable in internal or external catalogs.
Supplier Item ID	Field used by certain departments to reflect EAMS Item ID.
Templates	Allows requisitioners to group items together and simplify ordering.
Web Suppliers Page	The Web Suppliers Page displays only suppliers who have established a direct connection with Miami-Dade County.