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## **End-User Training Guide**

**Course Code: SCM 201**

**Course Title: Manage and Record Requisitions**

## Course Overview

### Course Description

This course provides a comprehensive review of the Manage and Record Requisition processes.

This course consists of the following modules:

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

### Training Audiences

The following audience(s), by INFORMS Security role(s) are required to complete this course prior to being granted related system access:

- Department Requisition Processor
- Department Buyer
- Department PO Processor

### Prerequisites

Participants are required to complete the following End-User Training courses prior to starting this course:

- ERP 101 – Overview of INFORMS
- ERP 102 – INFORMS Navigation, Reporting, and Online Help
- SCM 101 – Supply Chain Management Fundamentals

### Delivery Method

This course is intended to be delivered through Instructor-led Training.

### Estimated Duration

The total duration of this course, when delivered through Instructor-led Training, is 2.5 hours.

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## Module 1: Course Introduction

### Topics

This module covers the following topics:

- Course Administration and Logistics
- Learning Objectives
- Roles and Responsibilities
- Navigation
- Key Changes to the Business Process
- The End-to-End Business Process
- Introduction to Demonstrations and Exercises

## Module 1: Course Introduction

### Course Administration and Logistics

To get the most benefit from this course, participants should:

- Actively participate in class, and ask questions as needed
- Please turn off cell phones, and refrain from the use of email and the Internet
- Take breaks as scheduled and return to the classroom promptly

## Module 1: Course Introduction

### Learning Objectives

At the conclusion of this course, 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: Course Introduction

### Training Audience:

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

### Roles and Responsibilities

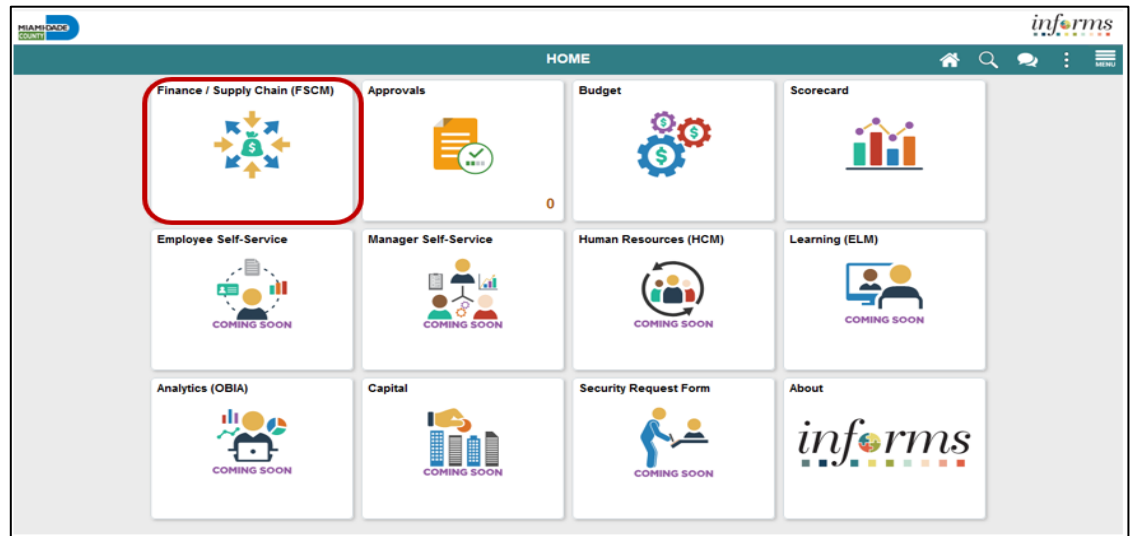
- **Department Buyer** – The Department Buyer has the ability to create and update Purchase Orders (PO), Change Orders - enter PO or source a PO from requisition, or change orders and dispatch.
- **Department Requisition Processor** – The Department Requisition Processor is a department end-user who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

### Navigation

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

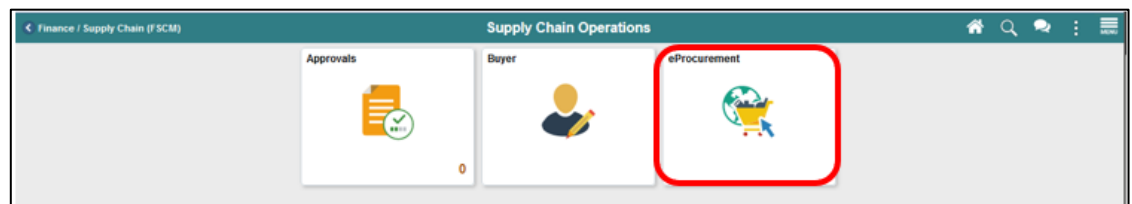
1. Login into **INFORMS** and select the **FINANCE/SUPPLY CHAIN (FSCM)** tile.



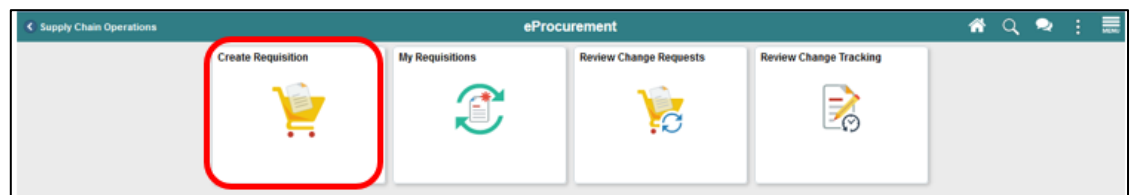
2. Select the **SUPPLY CHAIN OPERATION** tile.



3. Select the **ePROCUREMENT** tile from the Supply Chain Operations page:



4. Select the **CREATE REQUISITION** tile from the eProcurement page:





## Module 1: Course Introduction

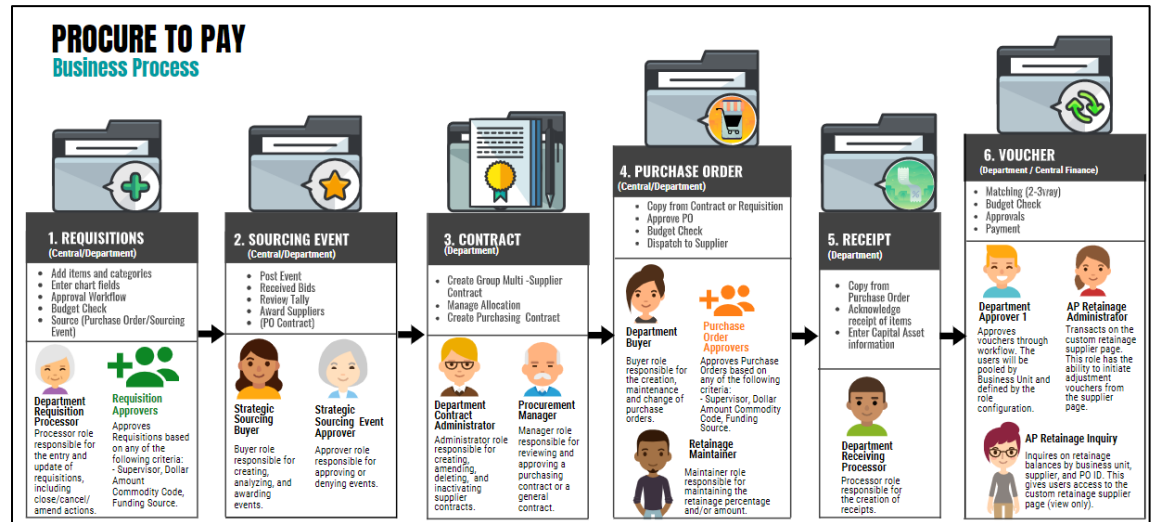
### Key changes to the Business Process

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

- INFORMS is the system of record for requisitions
  - Transit is the only department integrating EAMS 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: Course Introduction

### The End-to-End Business Process



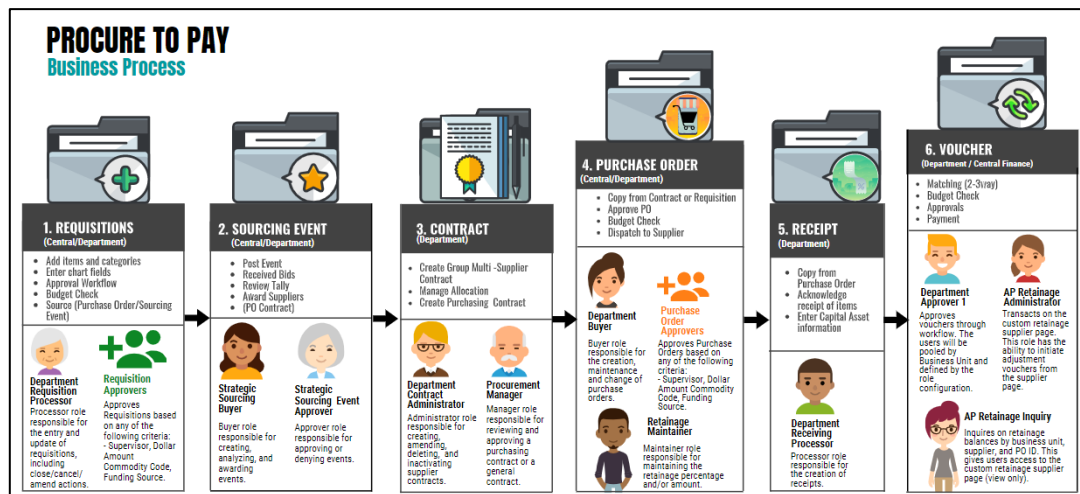
The INFORMS procure-to-pay process consist of the following high-level steps.

**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
- **Contract**
  - Create Group Multi-Supplier Contract
  - Manage Department Allocations
  - Manage Bidder Groups
  - Create Purchasing Contract

## Module 1: Course Introduction

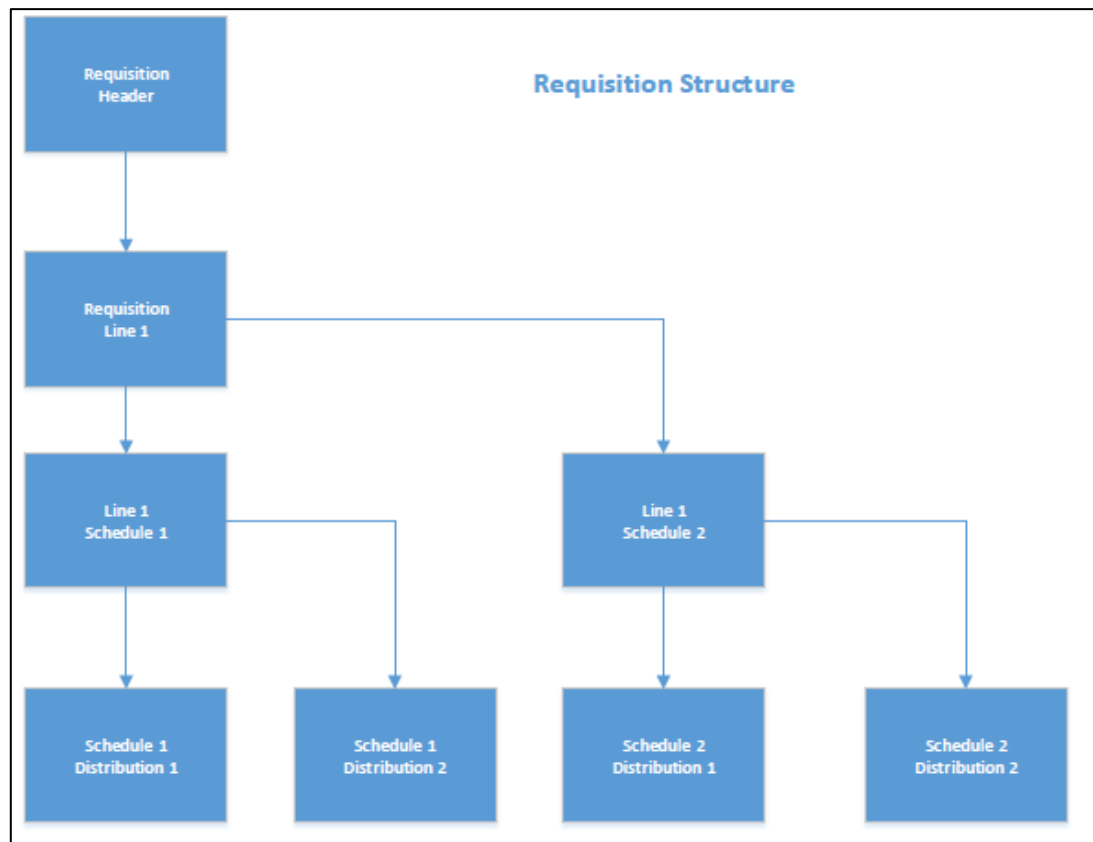
### The End-to-End Business Process



- **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: Course Introduction

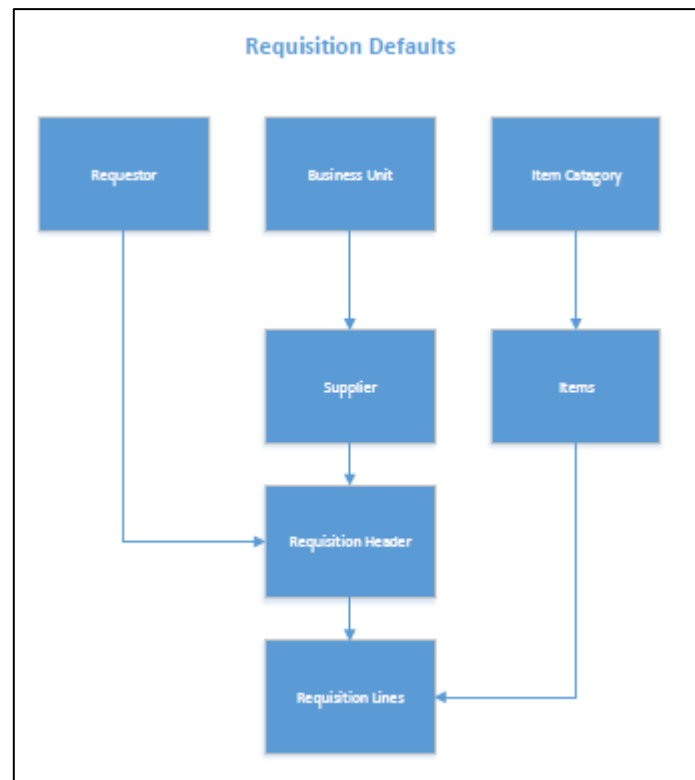
### The End-to-End Business Process



**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 define the goods or services details 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: Course Introduction

### The End-to-End Business Process



**Requisition Defaults:** The INFORMS system is highly integrated, and a user will experience its integration and defaults as they peel the 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 will default from a higher level, validate, and change any if necessary. It is also important to note that if a user changes the value at a lower level (e.g., Requisition Defaults page), the new value will prevail over the higher-level default.

Examples of field defaults include:

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

## Module 1: Course Introduction

### Introduction to Demonstrations Activities, and Exercises

Users will take part in three types of hands-on learning throughout this course: Instructor Demonstrations, Training Activities, and Training Exercises. The definitions and descriptions of each are below.

### Instructor Demonstrations



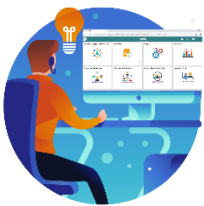
Instructor demonstration activities involve a walk-through of tasks and processes in INFORMS. The instructor will show how to perform these activities while users follow along.

### Training Activities



Users will perform tasks and processes in the INFORMS training environment by using the Training Activity and Data Sheet provided, and by using this training guide as a reference.

### Training Exercises



The Instructor will ask questions related to the lecture content and training activities, which are used to check a user's knowledge and understanding of course content.

## Module 1: Course Introduction

### Module 1: Course Introduction Summary

The following key concepts were covered in this module:

- Course Administration and Logistics
- Learning Objectives
- Roles and Responsibilities
- Navigation
- Key Changes to the Business Process
- The End-to-End Business Process
- Introduction to Demonstrations, Activities, and Exercises
- 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: Introduction

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

- Select an Item
- Create a Requisition from the Master Item Catalog
- Create a Requisition from Web Suppliers
- Create a Special Request

## Lesson 1: Create a Requisition

### Key Terms

The following key terms are used in this Lesson:



Term	Definition
<b>Attention To</b>	The person to whom the goods/services are to be delivered.
<b>Business Unit</b>	Business Units are defined for each entity and used to maintain and report on transactional data.
<b>Catalog</b>	Displays all active NIGP items that can be selected to add to a requisition.
<b>Category</b>	Classifies asset by type for accounting entry and reporting.
<b>ChartField</b>	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).
<b>Checkout Page</b>	the last step before submitting the requisition for approval.
<b>Distribution Page</b>	The Distribution Page is the fourth layer of a requisition used to enter accounting information (ChartFields).
<b>Due Date</b>	The date the requester anticipates the receipt of the goods or service.
<b>eProcurement</b>	the purchasing module that provides several ways for sourcing items to a requisition.
<b>Express Item Entry</b>	A requisition method that allows requisitioners to quickly add items to a requisition using a more straightforward online template.
<b>Favorites</b>	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
<b>Fund Code</b>	The primary structural units of Education and Government accounting. At MDC this will capture the source of revenue\expenses and be a self-balancing ChartField.
<b>Item Catalog</b>	Facilitates selection of goods and services maintained in the Item Master table from a catalog during the creation of a requisition.
<b>Item ID</b>	The unique system identifier for an item.
<b>Items Detail Page</b>	The Items Detail Page displays the item description, negotiated price, and availability for all items that meet the selected item category.
<b>Line Details Page</b>	The Line Details Page is used to verify and edit additional details for a line.
<b>Manufacturer Item ID</b>	Displays the EAMS Manufacturer ID. This field is required for the EAMS and INFORMS integration.
<b>National Institute of Government Purchasing (NIGP) Code</b>	A standard taxonomy for classifying goods and services. The intent of adopting a universal taxonomy is to improve visibility and conduct an in-depth analysis of spending to inform sourcing strategies and improve buying efficiency.
<b>Product Details Page</b>	The Product Details Page provides item attributes such as the product description and specifications.
<b>Punchout</b>	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.
<b>Requestor</b>	A user that needs to procure goods or services.

## Lesson 1: Create a Requisition

### Key Terms

The following key terms are used in this Lesson:



Term	Definition
<b>Requisition</b>	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 the purchase and how much of the total price each department should pay.
<b>Requisition ID</b>	This field is a system generated number associated with a requisition.
<b>Requisition Lines</b>	Also known as the "Line," and the second layer of a requisition, displays item details, adds functionality, and accesses the other requisition layers.
<b>Requisition Name</b>	Displays a description of the request to help you identify the requisition as it flows through the system. Certain departments will use this field to reflect the EAMS Requisition ID. If the field is left blank, the system used the requisition ID as the name
<b>Requisitioner</b>	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.
<b>Save Confirmation Page</b>	The Save confirmation Page is intended to enable the requisitioner to view a summary of the final requisition.
<b>Schedule Detail Page</b>	The Schedule Page is the third layer of a requisition, and it is used to review and modify schedule details for an item.
<b>Search Results Page</b>	The Search Results Page displays all items that met the search criteria.

## Lesson 1: Create a Requisition

### Key Terms



The following key terms are used in this Lesson:

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

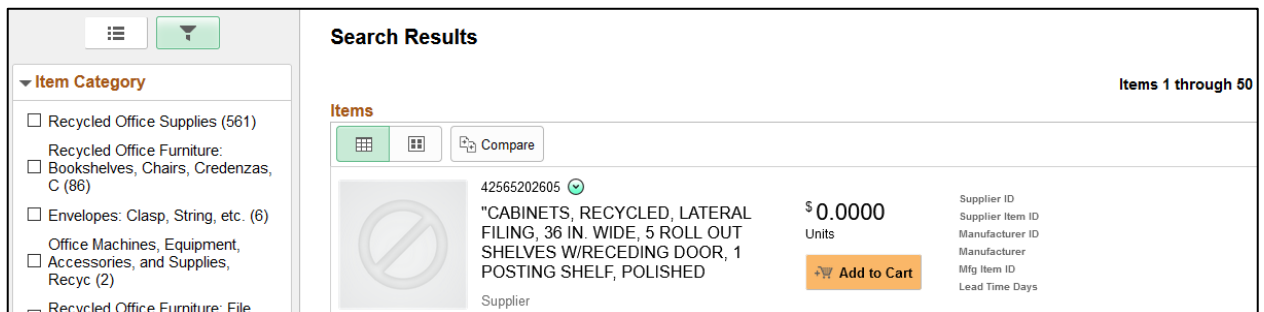
## Lesson 1: Create a Requisition

### Lecture 1: Selecting an Item

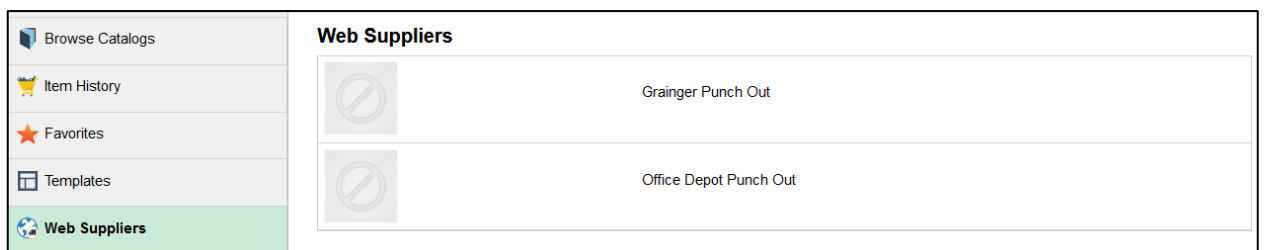
#### Selecting an Item:

The INFORMS system provides several methods for adding items to a requisition. In this lecture the methods will be introduced, and, in the lectures that follow, there will be a deeper dive into several of the options. **Note:** Job aids will be created for methods that are not detailed in this training manual.

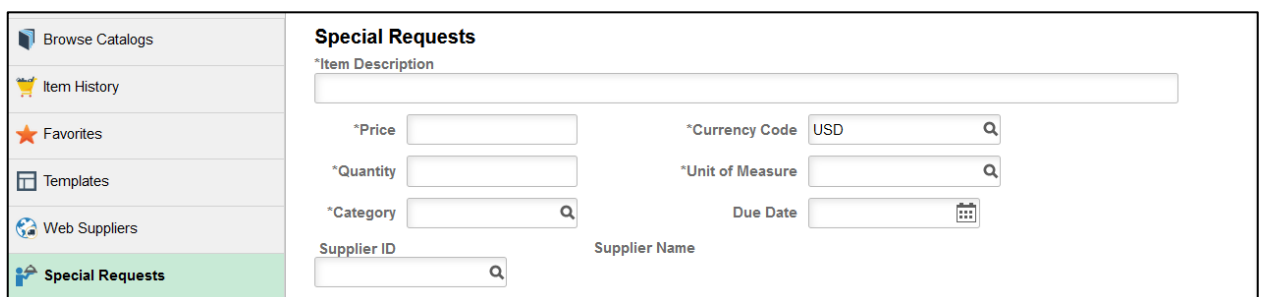
**Catalogs** – This is a method that consists of an internal catalog that Miami-Dade County has configured of active items (NIGP 7 to 11-Digits) and item categories (NIGP 5-digits) that will be available to all business units. Specific item categories may require additional catalogs, and access will be 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 will have the ability to browse the external catalogs and select items into the INFORMS requisition.



**Special Request** – This is a method to allow requisitioners to enter item descriptions for goods or services that may not be active in the internal or external catalogs.





## Lesson 1: Training Exercise 1

### Debrief

An external catalog maintained by a supplier and connected to the INFORMS system is known by what name?



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What purchasing method would you use to enter item descriptions for goods or services that may not be active in the internal or external catalogs?

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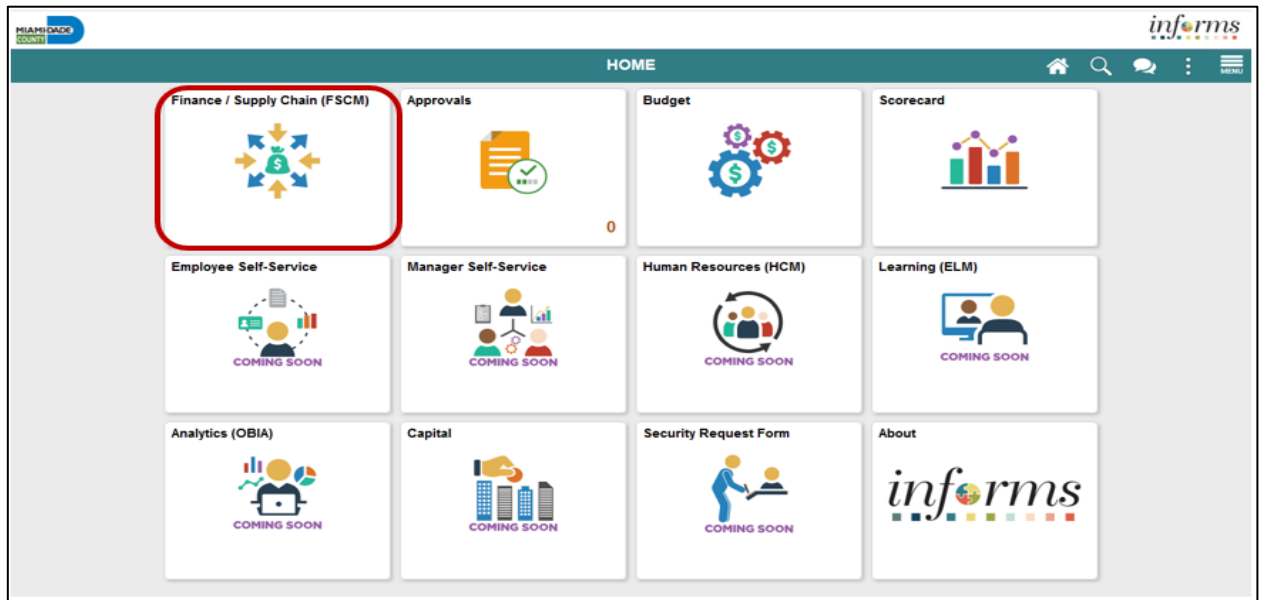


## Lesson 1: Create a Requisition

### Lecture 2: Creating a Requisition from the Master Item Catalog

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

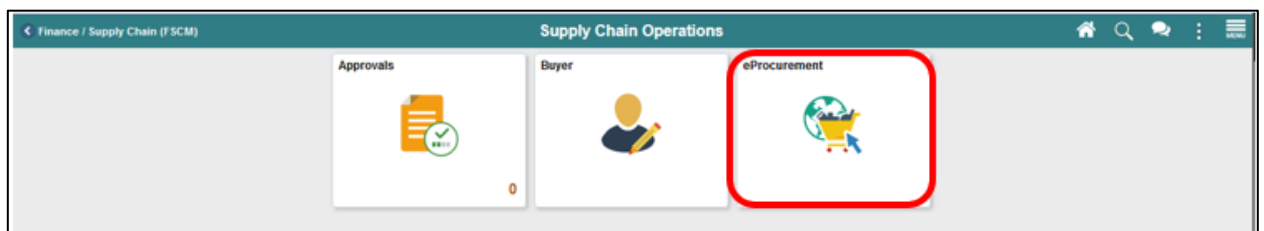
1. Login into **INFORMS** and select the **FINANCE/SUPPLY CHAIN (FSCM)**.



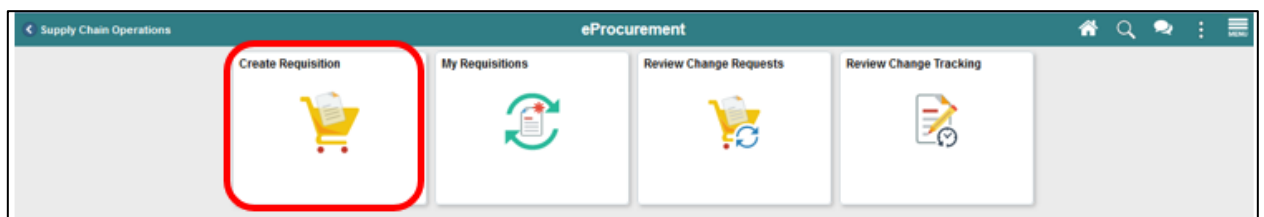
2. Select the **SUPPLY CHAIN OPERATION** tile.



3. Select the **ePROCUREMENT** tile.



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



## Lesson 1: Create a Requisition

### Lecture 2: Creating a Requisition from the Master Item Catalog

**IMPORTANT!** Miami-Dade County (MDC) uses the **National Institute of Government Purchasing (NIGP)** standard taxonomy for classifying goods and services. The benefit of a universal taxonomy is to improve visibility and conduct an in-depth analysis of spend and improve buying efficiency. The NIGP code has also been cross-referenced with other standard taxonomies such as the United Nations Standard Products & Services Code (UNSPSC). The cross-reference is helpful since MDC will be introducing "web suppliers," and they utilize UNSPSC standard. The NIGP code structure includes:

- 5-digit Item Category
- 7 to 11-digit Items

#### Common fields used in creating a requisition from the master item catalog:

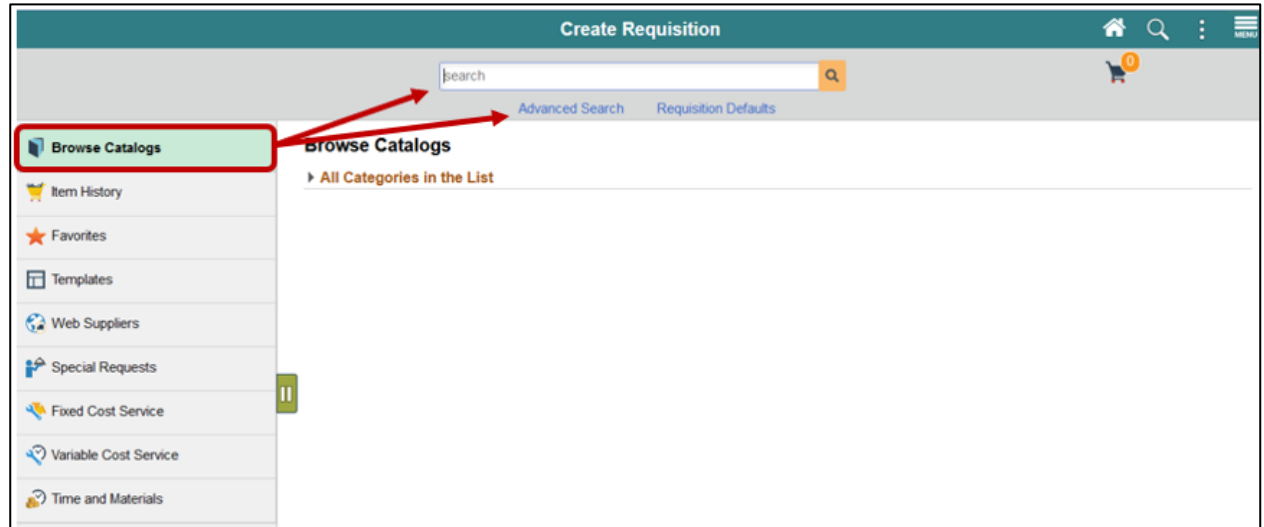
- **Attention To** – The person to whom the goods/services are to be delivered.
- **Business Unit** – The field defaults from the requisitioner's user profile. It represents the requisitioner's department.
- **Catalog** – Displays all active NIGP items that can be selected to add to a requisition.
- **Category** – The category (5-digit NIGP) enables the system to retrieve default values for the requisition.
- **Due Date** – The date the requester anticipates the receipt of the goods or service.
- **Manufacturer Item ID** – Displays the EAMS Manufacturer ID. This field is required for the EAMS and INFORMS integration.
- **Price** – Displays the supplier unit price, which is established when a contract is awarded to a supplier or an estimated supplier unit price.
- **Requisition ID** – This field is a system-generated number.
- **Requisition Name** – Displays the request's description to help identify the requisition as it flows through the system. This field will also display the EAMS Requisition ID. This field is required for the EAMS and INFORMS integration.
- **Ship To** – Location where the supplier will ship the order.
- **Supplier Item ID** – Displays the EAMS Requisition ID. This field is required for the EAMS and INFORMS integration.
- **Show at Receipt** – Select for comments to appear on the receipt documents
- **Send to Supplier** – Select for comments on the requisition to appear on the purchase order that is dispatched to a supplier.

## Lesson 1: Create a Requisition

### Lecture 2: Creating a Requisition from the Master Item Catalog

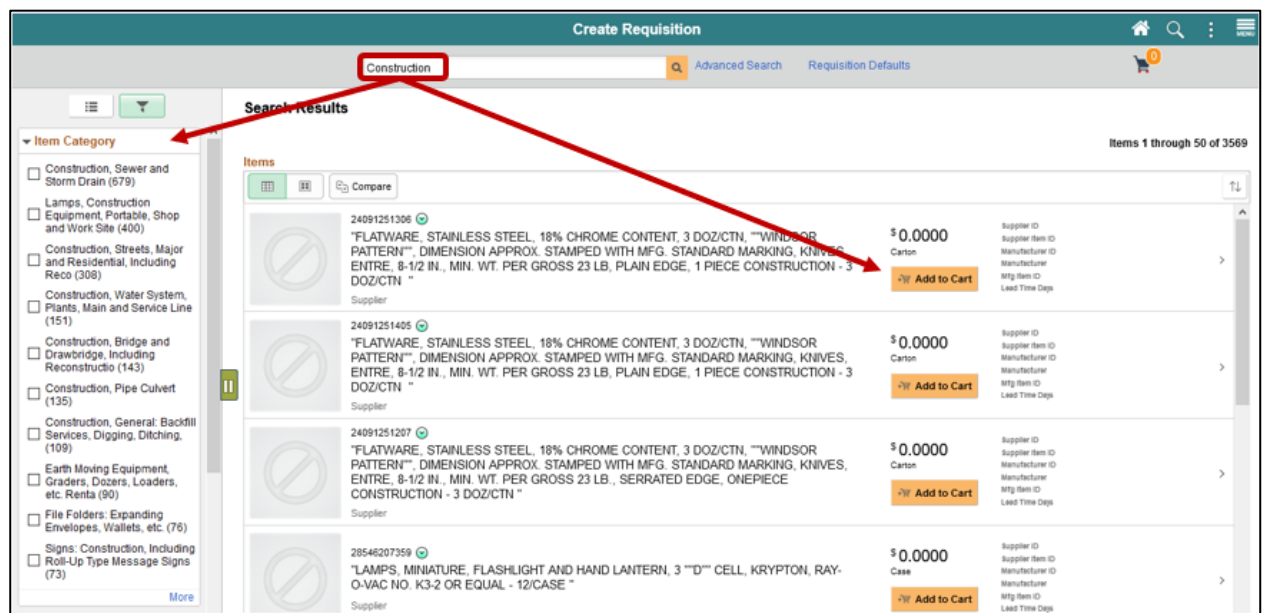
#### eProcurement Requisition Navigation Page:

The INFORMS eProcurement/Purchasing module provides several ways for sourcing items to a requisition (i.e., Catalog, Favorites, Templates, Web). This lecture will primarily focus on sourcing an item from the master item catalog. INFORMS provides basic and advanced search options to help find items to include in the requisition.



1. Enter the description of the item on the **SEARCH** field located at the top of the page.

The system will display the search results. If an item is not available based on the basic search criteria, the system will display a message "**No search results were found.**" It is required to select the **OK** button. To refine the search, proceed to the next step.



## Lesson 1: Create a Requisition

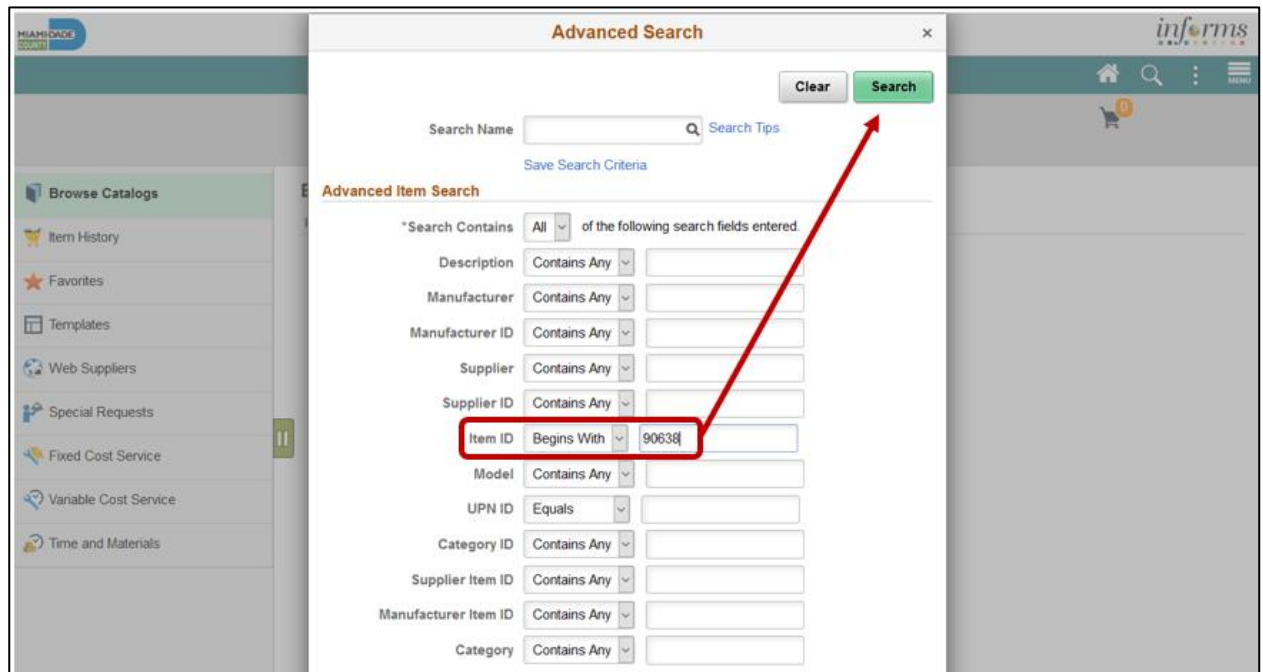
### Lecture 2: Creating a Requisition from the Master Item Catalog

2. Select the **ADVANCED SEARCH** link located at the top of the page. The requester will be required to enter at least one value on any of the search criteria listed.
3. It is recommended that the requester enter the 5-digit NIGP item category (formally known as Commodity Code) on the **ITEM ID** field.
4. Select the drop-down
5. Select the **BEGINS WITH** option.

This option enables the system to search the database for any item that begins with the 5-digit NIGP item category added to the **ITEM ID** field.

**Note:** As mentioned at the beginning of the lecture, Miami-Dade County has adopted the NIGP standard taxonomy. Therefore, the previous item descriptions used in the department-specific systems may not generate a hit on the advanced search.

6. Select the **SEARCH** button located on the top left of the page. The system will display items that meet the criteria on the search results page.



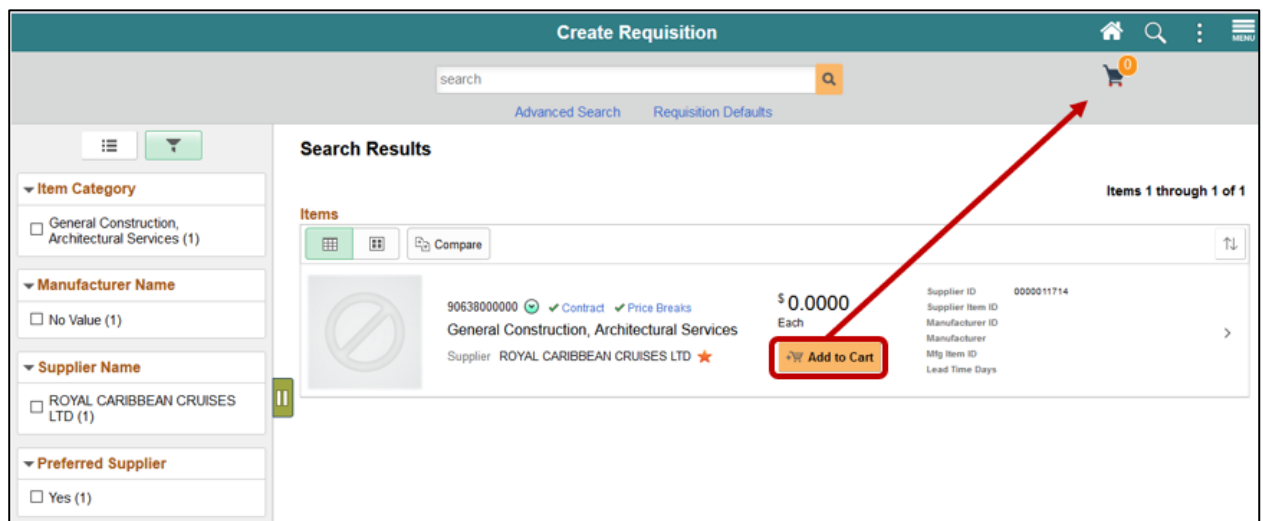
## Lesson 1: Create a Requisition

### Lecture 2: Creating a Requisition from the Master Item Catalog

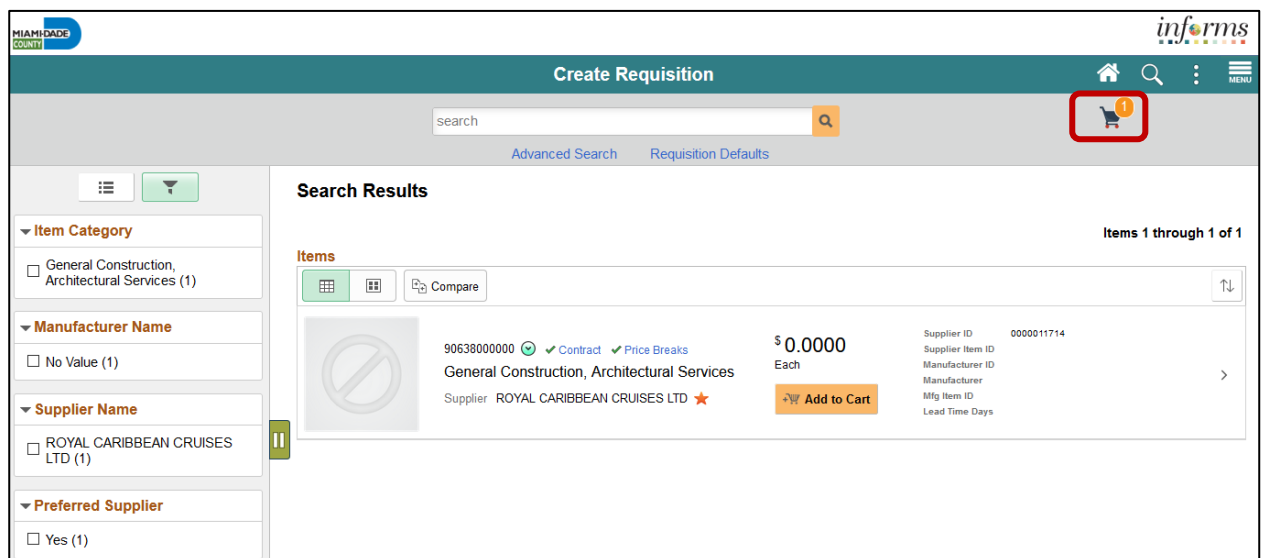
**Search Results Page:** The search results page displays all items that met the search criteria. The requisitioner will have a chance to refine their search results by selecting any of the menu options located on the left of the page. The menu includes the Item Category, Supplier Name, and the Preferred Supplier.

**Note:** The preferred supplier and supplier value may not necessarily reflect the supplier that will be used to source the requisition. An existing purchasing contract may have more than one supplier. The Buyer or Procurement Officer will make the final sourcing decision at the purchase order level.

7. Select the **ADD TO CART** button for the desired item. This action will update the **SHOPPING Cart**.



8. Select the **SHOPPING CART** button. This action will route to the shopping cart page.

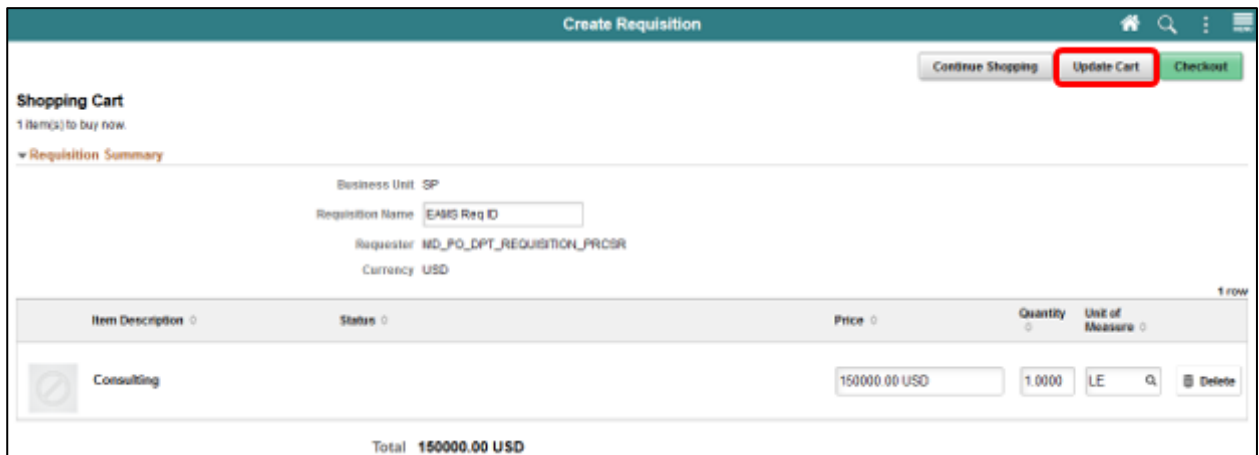


## Lesson 1: Create a Requisition

### Lecture 2: Creating a Requisition from the Master Item Catalog

**Shopping Cart Page:** The shopping cart page enables the requestor to review and update the shopping cart before proceeding to the **CHECKOUT** page. Below are some of the actions and options available:

- The **REQUISITION NAME** field can be updated to reflect a description that makes it easier for the approver to identify. **IMPORTANT!** Several departments will use this field (e.g., Transit) to reflect the **EAMS Requisition ID**. This field will be required for the EAMS and INFORMS integration.
- The **QUANTITY** field can be modified.
- 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.
- Once changes have been made to the shopping cart, it will be necessary to select the **UPDATE CART** button to save any changes.



The screenshot displays the 'Create Requisition' interface. At the top right, there are three buttons: 'Continue Shopping', 'Update Cart' (highlighted with a red box), and 'Checkout'. Below these is the 'Shopping Cart' section, which indicates '1 Item(s) to buy now'. A 'Requisition Summary' section shows details: Business Unit: SP, Requisition Name: EAMS Req ID, Requester: MD\_PO\_DPT\_REQUISITION\_PROGR, and Currency: USD. The main table lists the cart items with columns for Item Description, Status, Price, Quantity, and Unit of Measure. One item, 'Consulting', is listed with a price of 150000.00 USD, a quantity of 1.0000, and a unit of measure of LE. A 'Delete' button is next to the item. At the bottom, the total is shown as 150000.00 USD.

Item Description	Status	Price	Quantity	Unit of Measure
Consulting		150000.00 USD	1.0000	LE

Total: 150000.00 USD

## Lesson 1: Create a Requisition

### Lecture 2: Creating a Requisition from the Master Item Catalog

**Checkout Page:** The checkout page is the last step before submitting the requisition for approval.

9. 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 will:
10. 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 will use the Requisition ID as the name. **IMPORTANT!** Several departments will use this field (e.g., Transit) to reflect the **EAMS Requisition ID**. This field is a required field for the EAMS and INFORMS integration.
11. Select the appropriate **PRIORITY** value to indicate to the approver the priority. The approver will have visibility to the priority field on the approver page.
  - i. Low
  - ii. Medium (system default)
  - iii. High

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



**IMPORTANT!** 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 will leverage this information for the creation of a sourcing event.

## Lesson 1: Create a Requisition

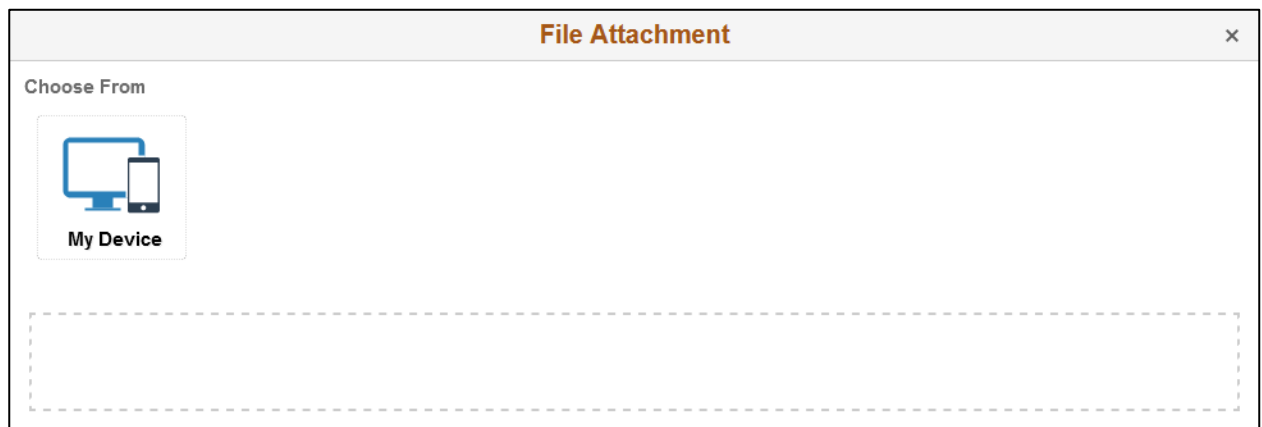
### Lecture 2: Creating a Requisition from the Master Item Catalog

The requisitioner should enter any essential information on the **COMMENT TEXT** field relevant to the item's sourcing.

12. Select the **ADD ATTACHMENT** button.



13. Select the **MY DEVICE** icon. This action will open the File Upload page.



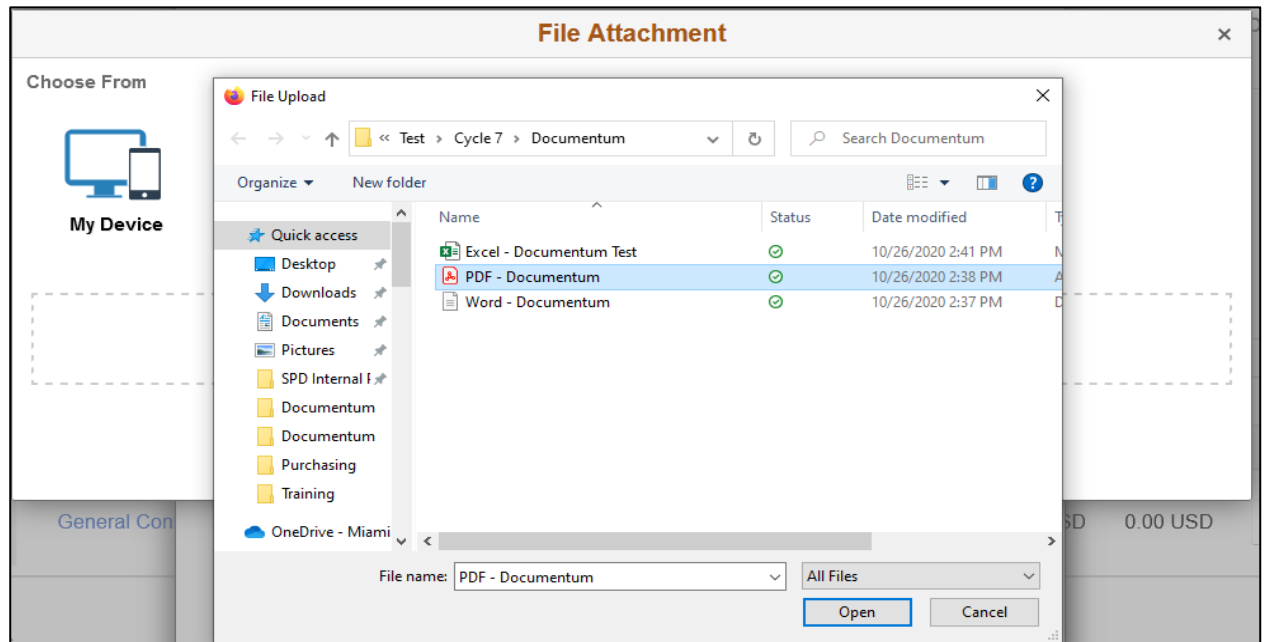


## Lesson 1: Create a Requisition

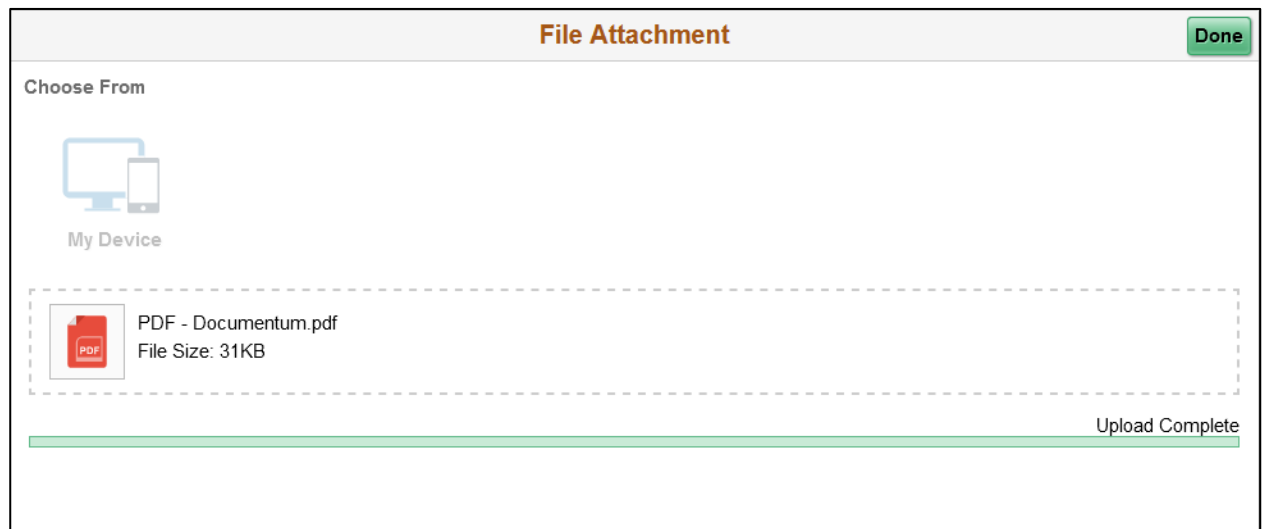
### Lecture 2: Creating a Requisition from the Master Item Catalog

14. Select the desired **FILENAME**
15. Select the **OPEN** button to attach the selected file to the File Attachment Page.

**Note:** INFORMS will accept any file type (i.e., Word, Excel, PDF, Visio, Audio, and Video), and file size should not be an issue.



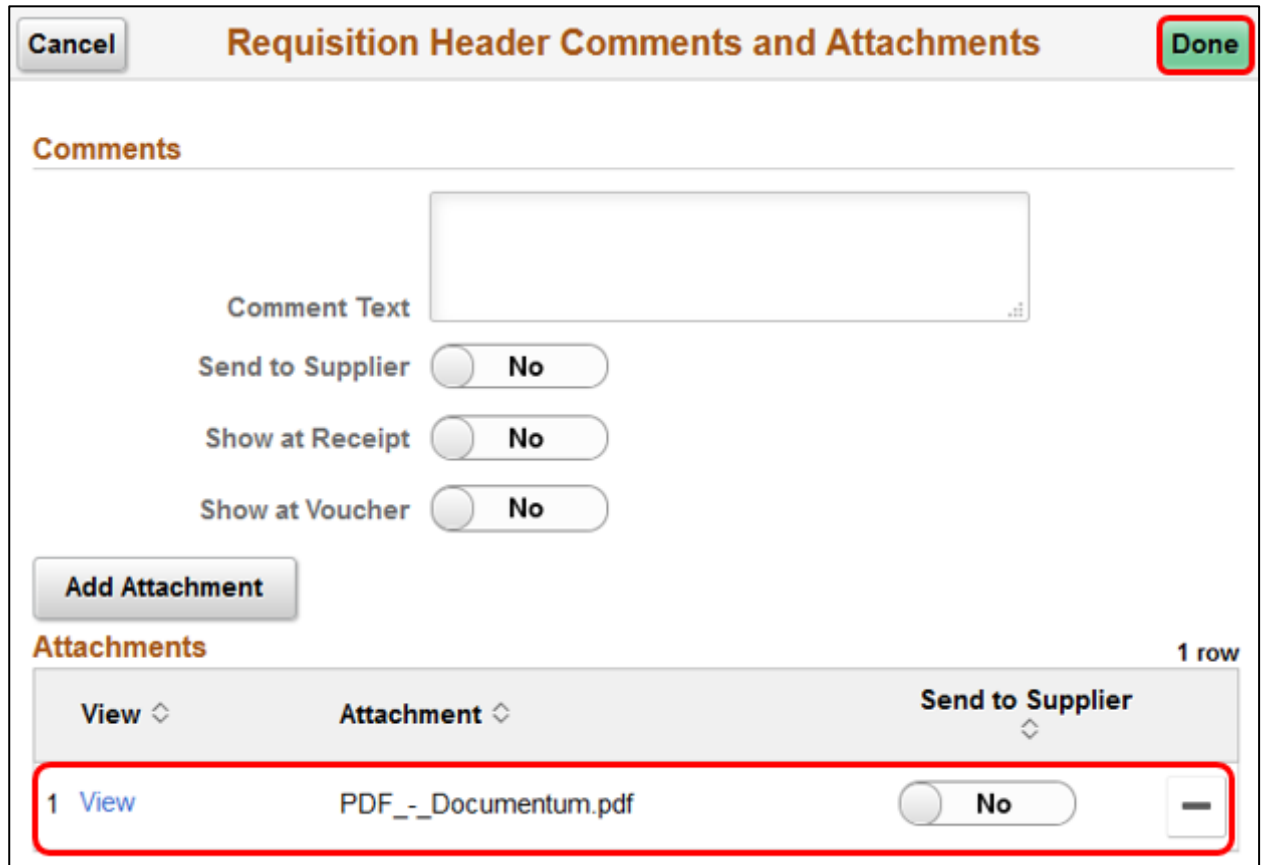
16. Confirm the file upload is complete and select the **DONE** button.



## Lesson 1: Create a Requisition

### Lecture 2: Creating a Requisition from the Master Item Catalog

17. Verify that all selected files reflect in the **Attachments** section. To add additional files, repeat the previous steps before selecting the **DONE** button. This action will route to the checkout page.



**Requisition Header Comments and Attachments**

**Comments**

Comment Text

Send to Supplier ☐ No

Show at Receipt ☐ No

Show at Voucher ☐ No

**Add Attachment**

**Attachments** 1 row


View	Attachment	Send to Supplier
1 View	PDF_-_Documentum.pdf	<input type="radio"/> No

## Lesson 1: Create a Requisition

### Lecture 2: Creating a Requisition from the Master Item Catalog

The **Requisition Lines** section (also known as the "Line," and the second layer of a requisition) displays item details, adds functionality, and accesses the 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.
- Once the requisition line is verified, select the **SCHEDULE DETAIL** button.



The screenshot shows the 'Requisition Lines' section of a software interface. At the top, there is a red-bordered box containing the text 'Requisition Lines'. Below this, there is a toolbar with buttons: 'Add to Favorites', 'Add to Template(s)', 'Delete Selected', and 'Mass Change'. A table with one row is displayed, showing details for a requisition line. The table has columns for 'Line', 'Item Description', 'Quantity', 'Unit of Measure', 'Price', and 'Total'. The data in the table is as follows:

Line	Item Description	Quantity	Unit of Measure	Price	Total
1	Consulting	1.0000	Del Ln Itm	150000.00 USD	150000.00 USD

Below the table, there is a section for 'Justification Comments' with a text input area. At the bottom, there are links for 'Check Budget', 'Pre-Check Budget', and 'Add Request Document'. The 'Budget Check Status' is shown as 'Not Chk'd'.

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

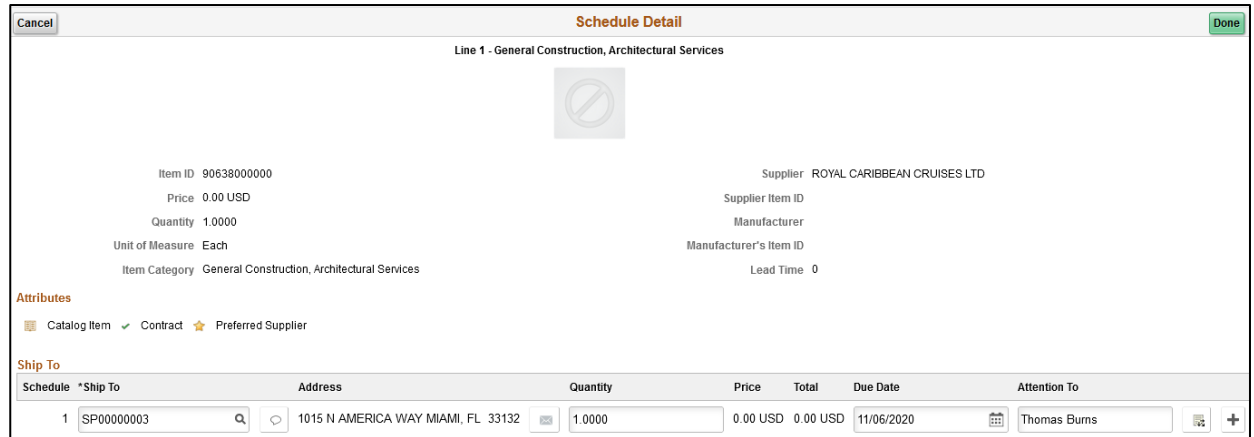
- Review or update the **SHIP TO** field. This field designates where the goods were received from a supplier.

**IMPORTANT!** All ship to values start with the business unit prefix (i.e., TP for Transit) If the correct value is not found, notify the purchasing section, and contact will be made to Central Procurement for location table updates.

## Lesson 1: Create a Requisition

### Lecture 2: Creating a Requisition from the Master Item Catalog

19. Update the **DUE DATE** field. This field defines what date items are expected to arrive at the SHIP TO location.
20. Select the **DISTRIBUTION** icon once the schedule detail page has been reviewed or updated, and the system will route to the Distribution page.



**Schedule Detail**

Line 1 - General Construction, Architectural Services

Item ID 9063800000  
Price 0.00 USD  
Quantity 1.0000  
Unit of Measure Each  
Item Category General Construction, Architectural Services

Supplier ROYAL CARIBBEAN CRUISES LTD  
Supplier Item ID  
Manufacturer  
Manufacturer's Item ID  
Lead Time 0

**Attributes**

☐ Catalog Item ☒ Contract ☒ Preferred Supplier

**Ship To**

Schedule	*Ship To	Address	Quantity	Price	Total	Due Date	Attention To
1	SP00000003	1015 N AMERICA WAY MIAMI, FL 33132	1.0000	0.00 USD	0.00 USD	11/06/2020	Thomas Burns

**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.

**IMPORTANT!** The accounting information entered at the beginning of the procure-to-pay process (requisition) will carry over to the purchase order and voucher. It is prudent that the correct ChartField values are added before the transaction is submitted for approval. This action will contribute to the prompt payment of a supplier. The **GL BUSINESS UNIT** field will always display "MDADE" as a default value.

21. Select the **CHARTFIELD2** tab.



**Distribution**

Schedule: 1  
Item Description: General Construction, Architectural Services  
Quantity: 1.0000 Each  
Merchandise Amount: USD  
Distribute By: Qty

**Chartfields1** **Chartfields2** Details Budget Information Asset Information Show All

Distribution Line	Status	Item Type	Location	Quantity	Open Qty	Percent	Merchandise Amount	GL Business Unit
1	Open	SP00000003		1.0000	1.0000	100.0000	0.00	MDADE

## Lesson 1: Create a Requisition

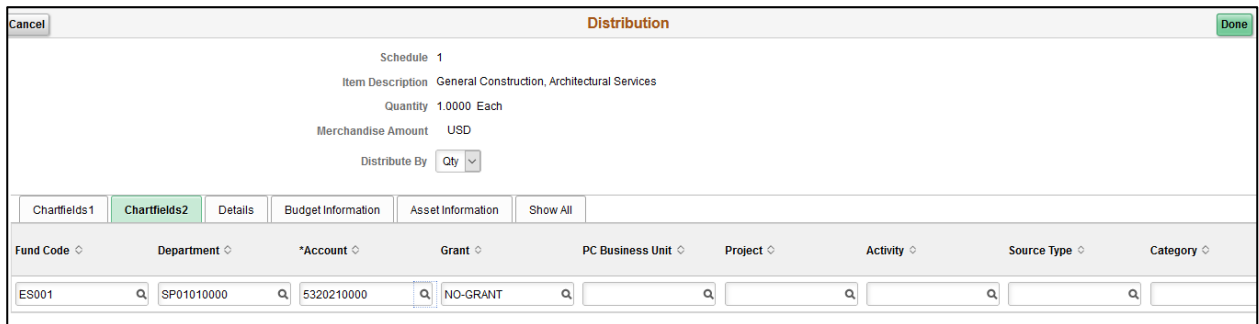
### Lecture 2: Creating a Requisition from the Master Item Catalog

22. Enter a **FUND CODE** value.
23. Enter a **DEPARTMENT** value
24. Enter an **ACCOUNT** value
25. 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.

**IMPORTANT!** 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:

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



Cancel Done

Schedule 1

Item Description General Construction, Architectural Services

Quantity 1.0000 Each

Merchandise Amount USD

Distribute By Qty

Chartfields1 **Chartfields2** Details Budget Information Asset Information Show All

Fund Code	Department	*Account	Grant	PC Business Unit	Project	Activity	Source Type	Category
ES001	SP01010000	5320210000	NO-GRANT					

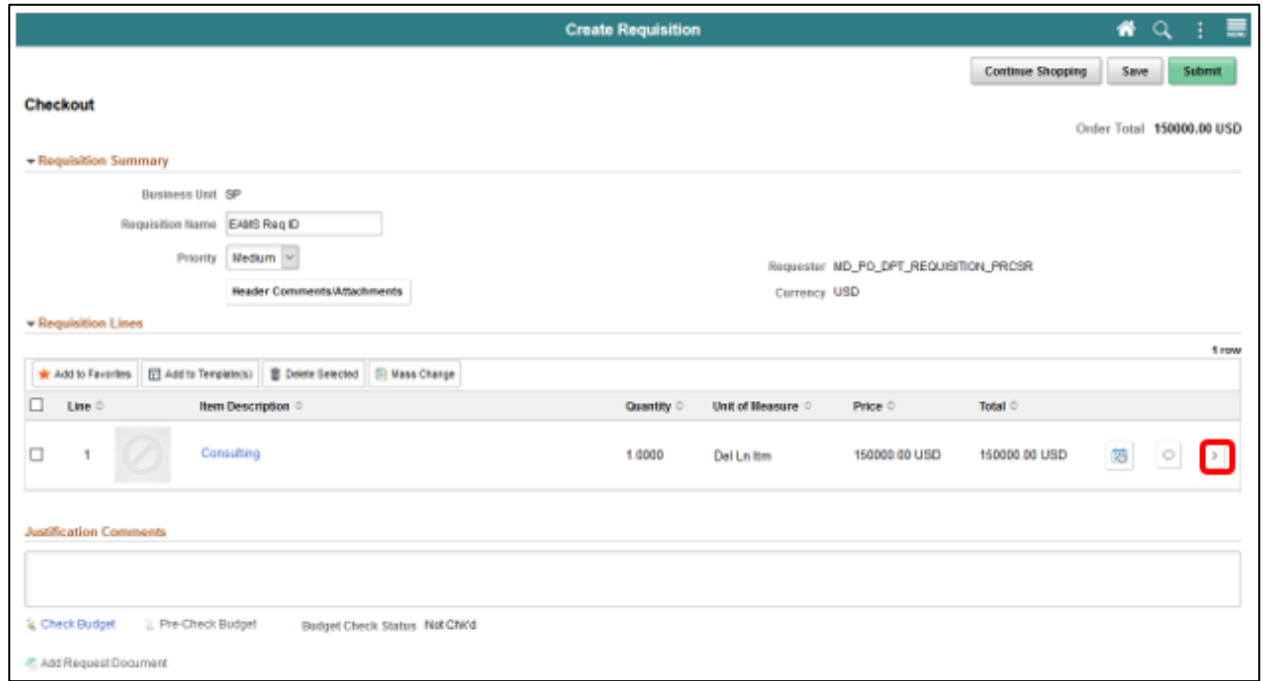
30. Select the **DONE** button when all the ChartField values have been selected. The system will then return to the Checkout page.

## Lesson 1: Create a Requisition

### Lecture 2: Creating a Requisition from the Master Item Catalog

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

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



**Create Requisition**

Continue Shopping Save Submit

**Checkout** Order Total 150000.00 USD

**Requisition Summary**

Business Unit SP

Requisition Name EAMS Raq ID

Priority Medium

Header Comments/Attachments

Requestor MD\_PO\_DPT\_REQUISITION\_PRCR

Currency USD

**Requisition Lines** 1 row

★ Add to Favorites □ Add to Template(s) 🗑 Delete Selected 🔄 Mass Change

Line	Item Description	Quantity	Unit of Measure	Price	Total	
1	Consulting	10000	Del Ln Item	150000.00 USD	150000.00 USD	🔍 ⚙️ <b>LINE DETAILS</b>

**Justification Comments**

Check Budget Pre-Check Budget Budget Check Status Not Chkd

Add Request Document

## Lesson 1: Create a Requisition

### Lecture 2: Creating a Requisition from the Master Item Catalog

**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 that I will highlight, which are vital for the EAMS and INFORMS integration.

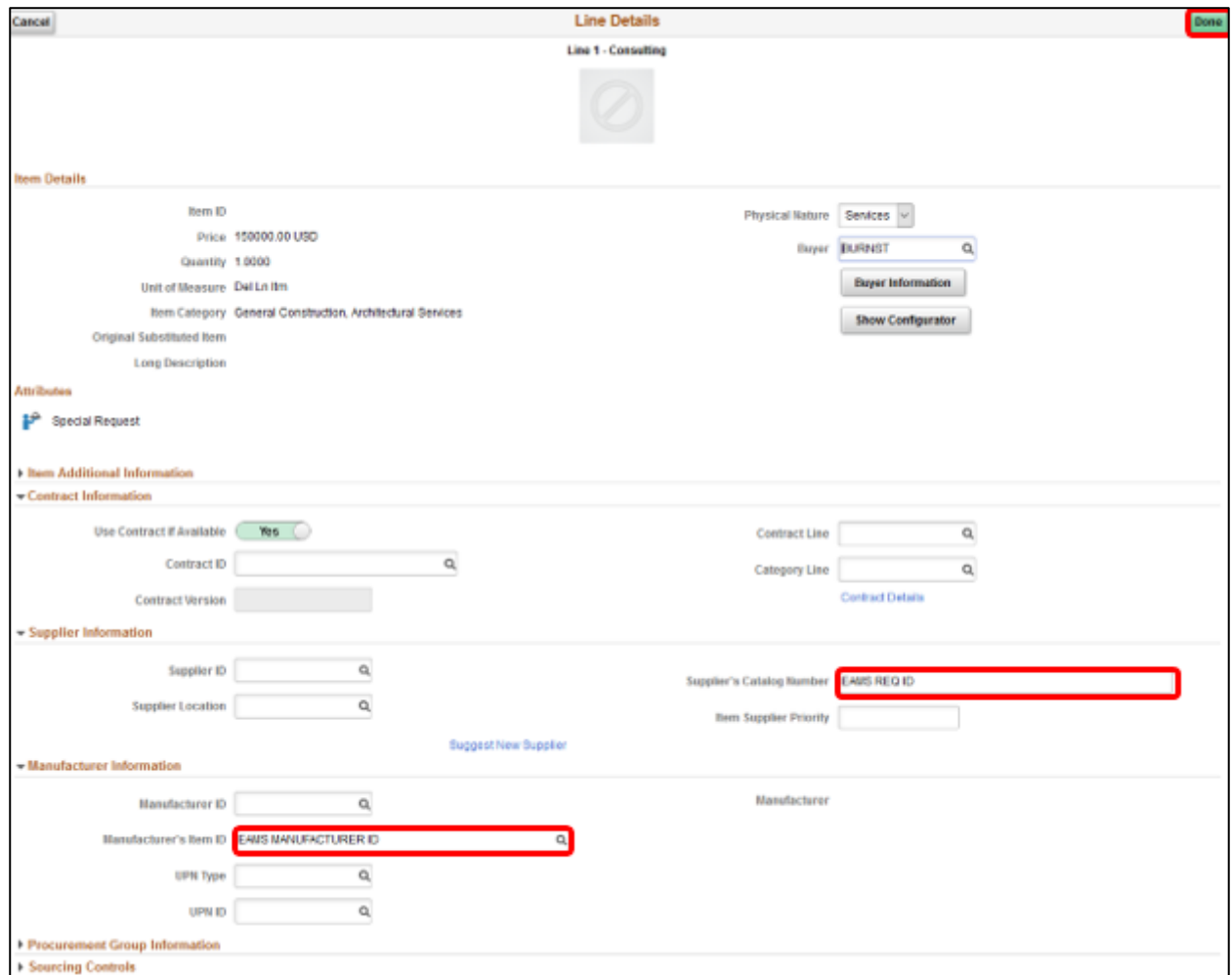
32. Enter the **SUPPLIER CATALOG NUMBER** value.

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

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

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

34. Select the **DONE** button when updates and relevant fields are verified. The system will then route to the Checkout page.



The screenshot displays the 'Line Details' page for 'Line 1 - Consulting'. The page is divided into several sections:

- Item Details:** Includes fields for Item ID, Price (150000.00 USD), Quantity (1.0000), Unit of Measure (Del Ln Item), Item Category (General Construction, Architectural Services), Original Substituted Item, and Long Description. It also has a 'Physical Nature' dropdown set to 'Services' and a 'Buyer' field with 'BURHST' and search buttons for 'Buyer Information' and 'Show Configurator'.
- Attributes:** Includes a 'Special Request' icon and text.
- Item Additional Information:**
  - Contract Information:** Includes 'Use Contract if Available' (set to 'Yes'), 'Contract ID', 'Contract Version', 'Contract Line', and 'Category Line'.
  - Supplier Information:** Includes 'Supplier ID', 'Supplier Location', 'Supplier's Catalog Number' (highlighted with a red box and containing 'EAMS REQ ID'), and 'Item Supplier Priority'.
  - Manufacturer Information:** Includes 'Manufacturer ID', 'Manufacturer's Item ID' (highlighted with a red box and containing 'EAMS MANUFACTURER ID'), 'UPN Type', and 'UPN ID'.
- Procurement Group Information** and **Sourcing Controls** sections are visible at the bottom.

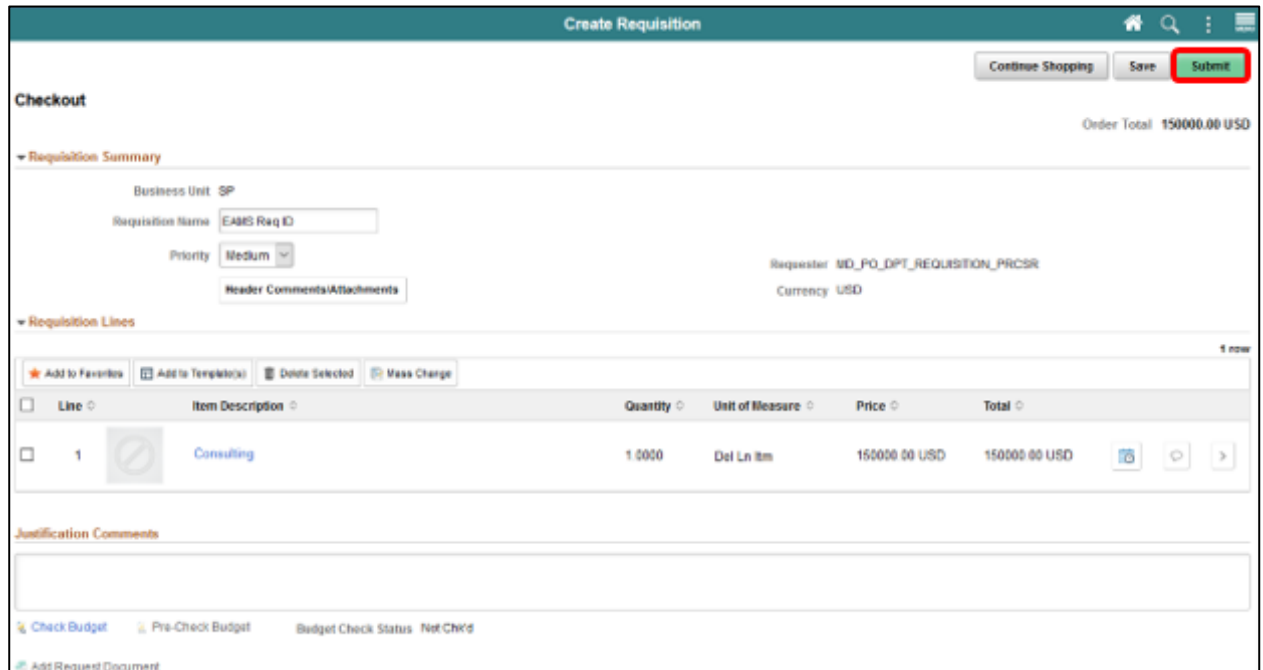
A 'Cancel' button is in the top left, and a 'Done' button is in the top right corner.

## Lesson 1: Create a Requisition

### Lecture 2: Creating a Requisition from the Master Item Catalog

**IMPORTANT!** 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.

35. Select the **SUBMIT** button when all relevant fields have been updated. The system will then route to the Save Confirmation page.



The screenshot shows the 'Create Requisition' page with the 'Checkout' section. The 'Submit' button is highlighted with a red box. The page displays the following information:

- Checkout**
  - Order Total: 150000.00 USD
- Requisition Summary**
  - Business Unit: SP
  - Requisition Name: EAMS Req ID
  - Priority: Medium
  - Requester: MD\_PO\_DPT\_REQUISITION\_PRCR
  - Currency: USD
  - Header Comments/Attachments
- Requisition Lines**
  - 1 now
  - Buttons: Add to Favorites, Add to Template(s), Delete Selected, Mass Change

Line	Item Description	Quantity	Unit of Measure	Price	Total
1	Consulting	1.0000	Del Ln Item	150000.00 USD	150000.00 USD
- Justification Comments**
  - Check Budget, Pre-Check Budget, Budget Check Status: Not Chkd
  - Add Request Document

**Save Confirmation Page:** The Save confirmation page is intended to enable the requisitioner to view a summary of the final requisition. Also, it provides access to preview the approval workflow and to print the requisition.

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



The screenshot shows the 'Create Requisition' page with the 'Save Confirmation' section. The 'View Approval Chain' button is highlighted with a red box. The page displays the following information:

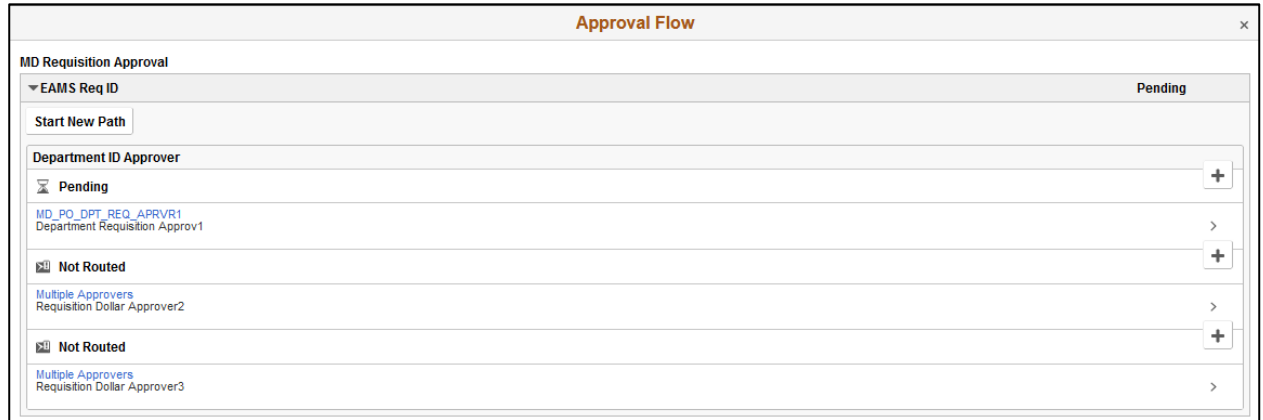
- Save Confirmation**
  - Buttons: My Requisitions, Create New Requisition
- Business Unit: SP
- Requisition ID: 000000043
- Requisition Name: EAMS Req ID
- Total Amount: 150000.00
- Currency: USD
- Total Lines: 1
- Status: Pending Approval
- Buttons: View Approval Chain, View Print
- Check Budget, Pre-Check Budget, Budget Check Status: Not Chkd



## Lesson 1: Create a Requisition

### Lecture 2: Creating a Requisition from the Master Item Catalog

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



The screenshot displays the "MD Requisition Approval" workflow diagram. At the top, the title "MD Requisition Approval" is shown next to a "Start New Path" button. Below this, the workflow is organized into a table-like structure with columns for "EAMS Req ID" and "Status". The status "Pending" is indicated in the top right corner. The workflow steps are as follows:

EAMS Req ID	Status
Department ID Approver	
MD_PO_DPT_REQ_APRVR1 Department Requisition Approv1	Pending
Multiple Approvers Requisition Dollar Approver2	Not Routed
Multiple Approvers Requisition Dollar Approver3	Not Routed

Each step in the workflow is followed by a right-pointing arrow (>) and a plus sign (+) button, indicating the flow continues to the next step.

## Lesson 1: Training Activity 1

**Demonstration** The Instructor will now demonstrate how to execute the business process through the INFORMS training environment.

**Instructions** Please refer to Activity 1 on the SCM 201 Training Activity and Data Sheet.

This activity will be performed individually; users must complete it on their workstation using the INFORMS training environment. Instructors will explain how to log into INFORMS.

Users will perform the activity by following the SCM 201 Training Activity Guide and Data Sheet and by using the training materials as reference tools.

Instructors are available to answer any questions.

## Lesson 1: Training Exercise 2

### Debrief

(True/False) The preferred supplier and supplier value may not necessarily reflect the supplier that will be used to source the requisition.



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(True/False) The Schedule Page is used to review and modify schedule details for an item.

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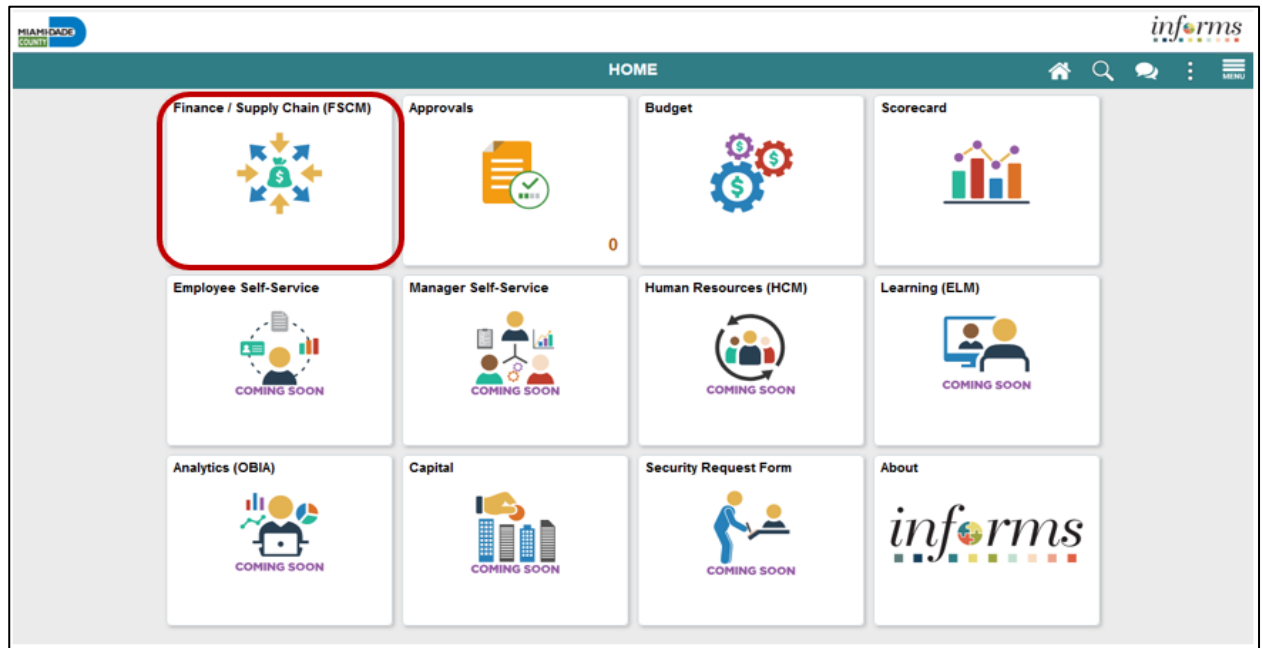
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## Lesson 1: Create a Requisition

### Lecture 3: Creating a Requisition from Web Suppliers

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

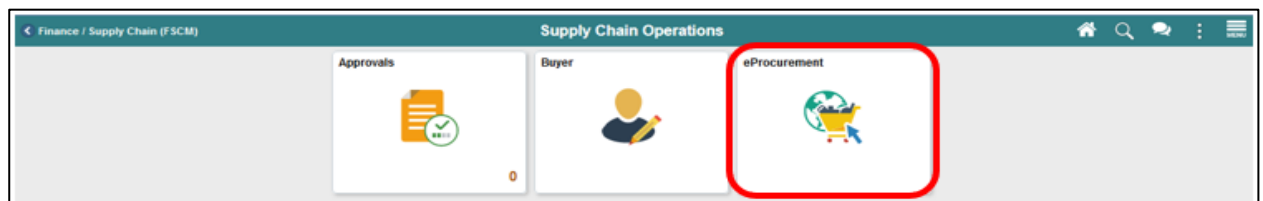
1. Login into **INFORMS** and select the **FINANCE/SUPPLY CHAIN (FSCM)** tile.



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



3. Select the **ePROCUREMENT** tile.



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



## Lesson 1: Create a Requisition

### Lecture 3: Creating a Requisition from Web Suppliers

**What is a web supplier (Punchout)?** The ability to access remote catalogs (i.e., Office Depot and Grainger) that are maintained by a supplier rather than Miami-Dade County (MDC). The interaction enables an MDC requisitioner to browse and search the web supplier's online catalog to select items to add back into the INFORMS system requisition.

**IMPORTANT!** The Internal Services Department (ISD), Materials Management Division will no longer support the ISD Business Supplies Catalog. All business units will be required to order office supplies via the web supplier (punchout) option in INFORMS. All deliveries will be made directly from the supplier and not ISD Material Management.

#### Common Elements Used in Web Suppliers:

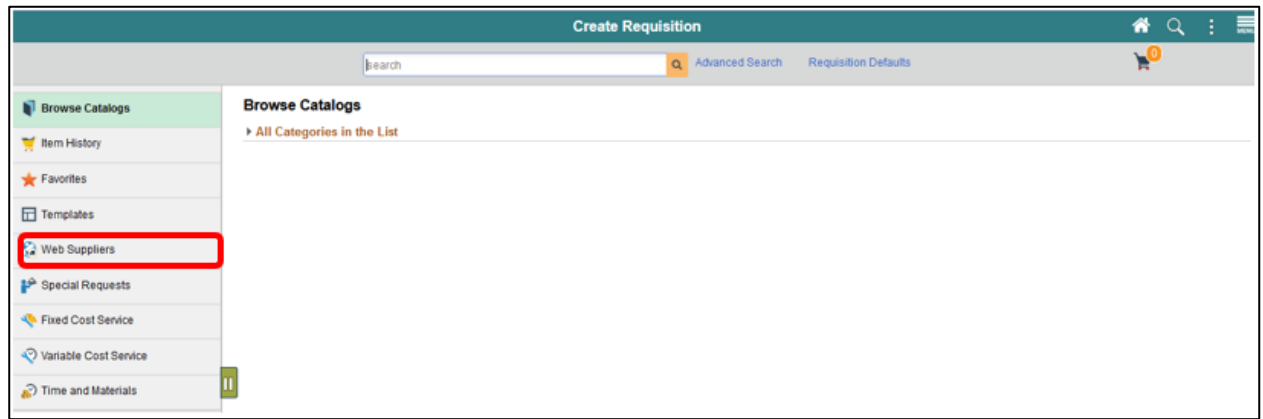
- The **HOME** button is used to return to the main page.
- The **SEARCH** button is used for a global search of the system.
- The **MENU** button is used to navigate throughout the system.
- The **SHOPPING CART** button is used to view the items selected and enter the desired quantity.
- The **VIEW SCHEDULE** button is used to view the schedule details page.
- The **ADD ATTACHMENTS AND COMMENTS** button is used to view the line comments and attachment page.
- The **VIEW DETAILS** button is used for the Line Details page.
- The **ADD A NEW ROW** button is used to add a new line on the transaction.
- The **DELETE ROW** button is used to delete a row on the transaction.
- The **DISTRIBUTION** button is used to view the Distribution page.

## Lesson 1: Create a Requisition

### Lecture 3: Creating a Requisition from Web Suppliers

**eProcurement Requisition Navigation Page:** The INFORMS eProcurement/Purchasing module provides several ways for sourcing items to a requisition (i.e., Catalog, Favorites, Templates, Web). This lecture will primarily focus on sourcing an item from web suppliers.

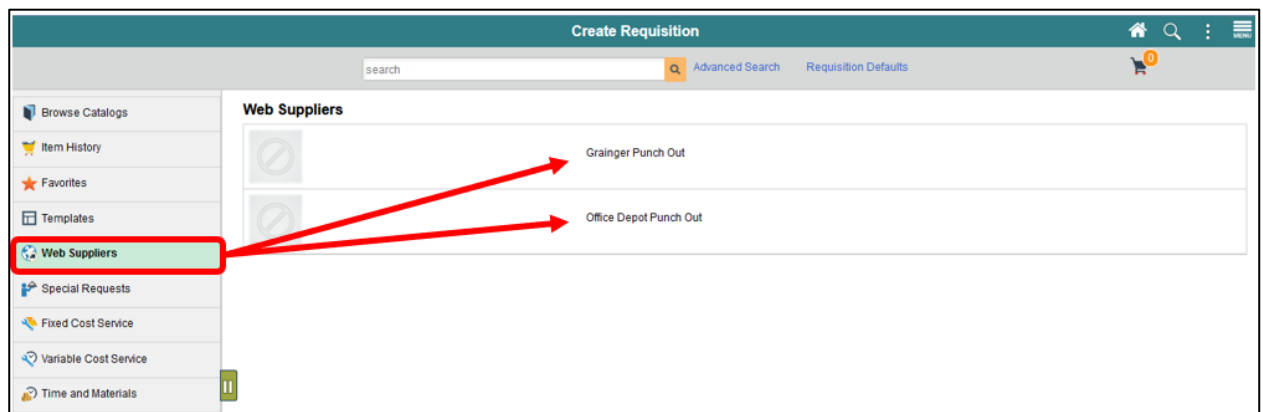
5. Select the **WEB SUPPLIERS** button to access the Web Supplier page.



**Web Suppliers Page:** The web suppliers page displays only those suppliers who have established a direct connection with Miami-Dade County.

**Note:** Office Depot and Grainger are the only two suppliers available currently. The Internal Services Department will be making this option available to additional suppliers in the future.

6. Select the **SUPPLIER** link to access the supplier's catalog page.



## Lesson 1: Create a Requisition

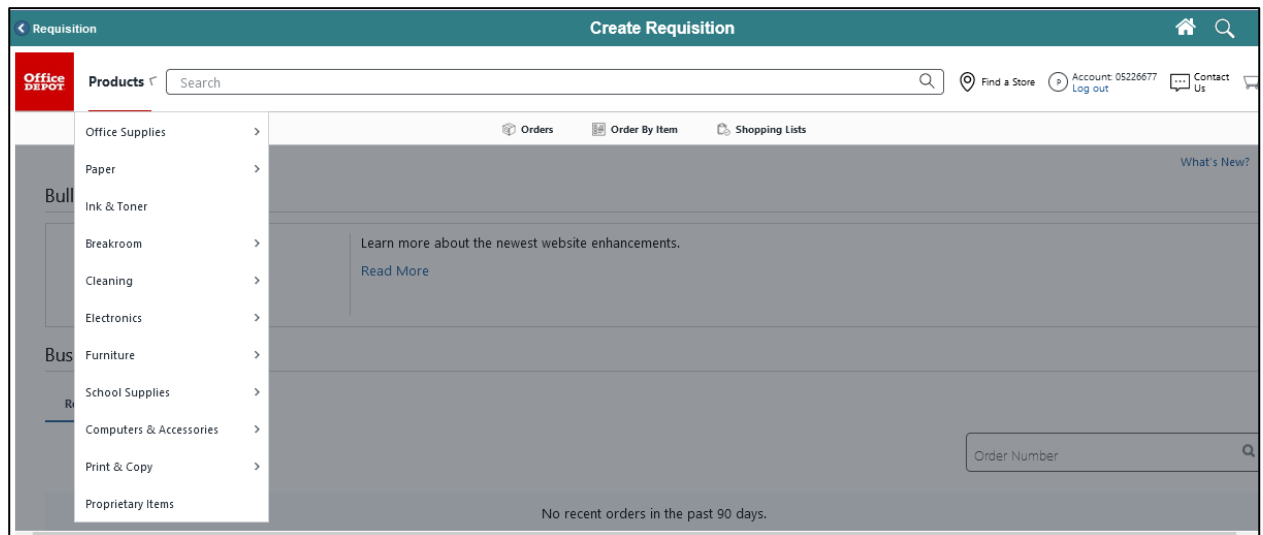
### Lecture 3: Creating a Requisition from Web Suppliers

**Catalog Page:** The catalog page will vary by supplier. However, both will have basic and advance search options. Each option enables the requisitioner to key specific information to route them to the item category or item details.

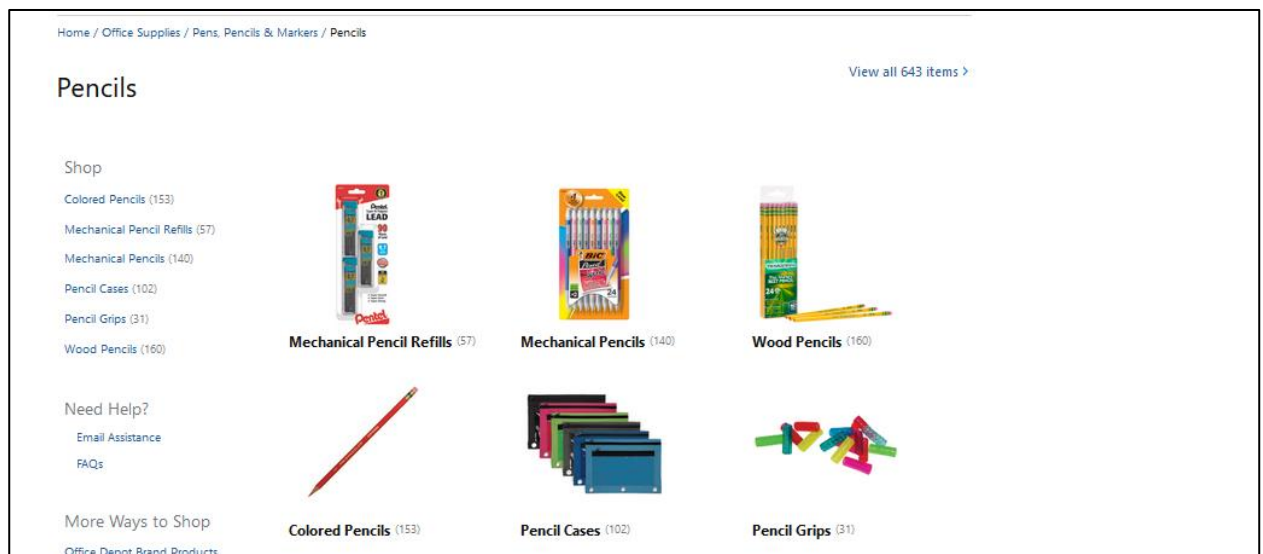
**Note:** The supplier catalog will only display items that are available to Miami-Dade County based on the contract guidelines.

7. Enter the desired item or select an item from the available drop-down menu.

**Note:** The results will vary based on the level of detail entered or selected.



8. Select the item category. The system will route the requisitioner to the items details page and display all items that meet the criteria.



## Lesson 1: Create a Requisition

### Lecture 3: Creating a Requisition from Web Suppliers

**Items Detail Page:** The items detail page displays the item description, negotiated price, and availability for all items that meet the selected item category (i.e., Wood Pencils).

9. Select the **ITEM** icon. This action will route the requisitioner to the product details page.


**Note:** The item icon will vary based on the item selected. Also, it is not required to select on the item icon. A requisitioner can enter a quantity and select the **ADD TO CART** button. For this training, we will drill down to the product details page.

☐ Office Depot (15)  
 ▼ See All Brand

☒ Pack Size  
☐ 12 (64)  
☐ 144 (38)  
☒ 72 (15)  
☐ 1 (12)  
☐ 36 (6)  
 ▼ See All Pack Size


☒ Color (Barrel)  
☐ Yellow (62)  
☐ Multicolor (25)  
☐ Assorted (19)  
☐ Black (8)  
☐ White (7)  
 ▼ See All Color (Barrel)

☒ Lead Type  
☐ #2 (41)  
☐ HB (31)



Item 747195  
 Ticonderoga® Woodcase Pencils,  
 #2 Lead, Soft, Pack of 96  
 Availability: 22  
 ✓ Sold Online

Qty  **\$32<sup>84</sup>** / pack  
[Add to Cart](#)  
☐ Compare



Item 760452  
 Ticonderoga® Pencils , Pre-  
 Sharpened, #2 Soft Lead, Yellow  
 Barrel, Box Of 30  
 Availability: 518  
 ✓ Sold Online  
[Safety Data Sheets](#)

Qty  **\$7<sup>64</sup>** / box  
[Add to Cart](#)  
☐ Compare

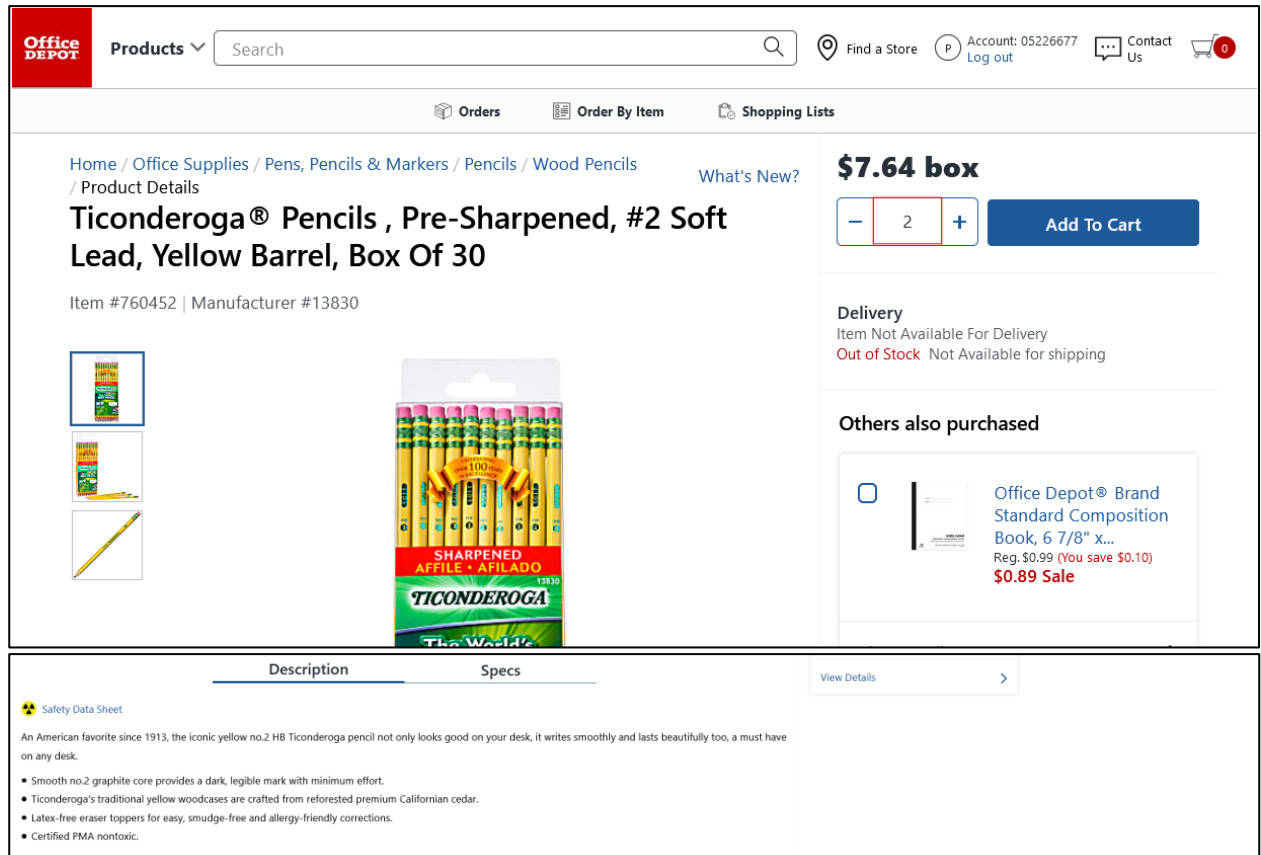


## Lesson 1: Create a Requisition

### Lecture 3: Creating a Requisition from Web Suppliers

**Product Details Page:** The product details page provides item attributes such as the product description and specifications. The page also provides details related to availability and price.

10. Enter the **QUANTITY** by either keying in the amount or selecting the plus sign.
11. Select the **ADD TO CART** button. This action will route the requisitioner to the shopping cart review page.



The screenshot shows the Office Depot website interface. At the top, there's a navigation bar with the Office Depot logo, a search bar, and links for 'Find a Store', 'Account: 05226677 Log out', and 'Contact Us'. Below the navigation bar are tabs for 'Orders', 'Order By Item', and 'Shopping Lists'. The main content area displays the product details for 'Ticonderoga® Pencils, Pre-Sharpended, #2 Soft Lead, Yellow Barrel, Box Of 30'. The breadcrumb trail is 'Home / Office Supplies / Pens, Pencils & Markers / Pencils / Wood Pencils / Product Details'. The product title is 'Ticonderoga® Pencils, Pre-Sharpended, #2 Soft Lead, Yellow Barrel, Box Of 30'. Below the title, it says 'Item #760452 | Manufacturer #13830'. There are three small images of the pencil box and a larger image of the pencil box. To the right of the product title, the price is '\$7.64 box' and there is an 'Add To Cart' button. Below the price, there is a quantity selector showing '2' and a 'Delivery' status: 'Item Not Available For Delivery' and 'Out of Stock Not Available for shipping'. Below the delivery status, there is a section 'Others also purchased' with a recommendation for 'Office Depot® Brand Standard Composition Book, 6 7/8" x...' at a sale price of '\$0.89 Sale'. At the bottom, there are tabs for 'Description' and 'Specs'. The 'Description' tab is active, showing a 'Safety Data Sheet' icon and a paragraph about the pencil's history and features. The 'Specs' tab is also visible. A 'View Details' link is located at the bottom right of the product details section.

Office Depot

Products ▾ Search

Find a Store Account: 05226677 Log out Contact Us

Orders Order By Item Shopping Lists

Home / Office Supplies / Pens, Pencils & Markers / Pencils / Wood Pencils / Product Details What's New?

**Ticonderoga® Pencils, Pre-Sharpended, #2 Soft Lead, Yellow Barrel, Box Of 30**

Item #760452 | Manufacturer #13830

**\$7.64 box**


– 2 + Add To Cart

**Delivery**  
Item Not Available For Delivery  
Out of Stock Not Available for shipping

**Others also purchased**

Office Depot® Brand Standard Composition Book, 6 7/8" x...  
Reg. \$0.99 (You save \$0.10)  
**\$0.89 Sale**

**Description** **Specs** View Details >

 Safety Data Sheet

An American favorite since 1913, the iconic yellow no.2 HB Ticonderoga pencil not only looks good on your desk, it writes smoothly and lasts beautifully too, a must have on any desk.

- Smooth no.2 graphite core provides a dark, legible mark with minimum effort.
- Ticonderoga's traditional yellow woodcases are crafted from reforested premium Californian cedar.
- Latex-free eraser toppers for easy, smudge-free and allergy-friendly corrections.
- Certified PMA nontoxic.

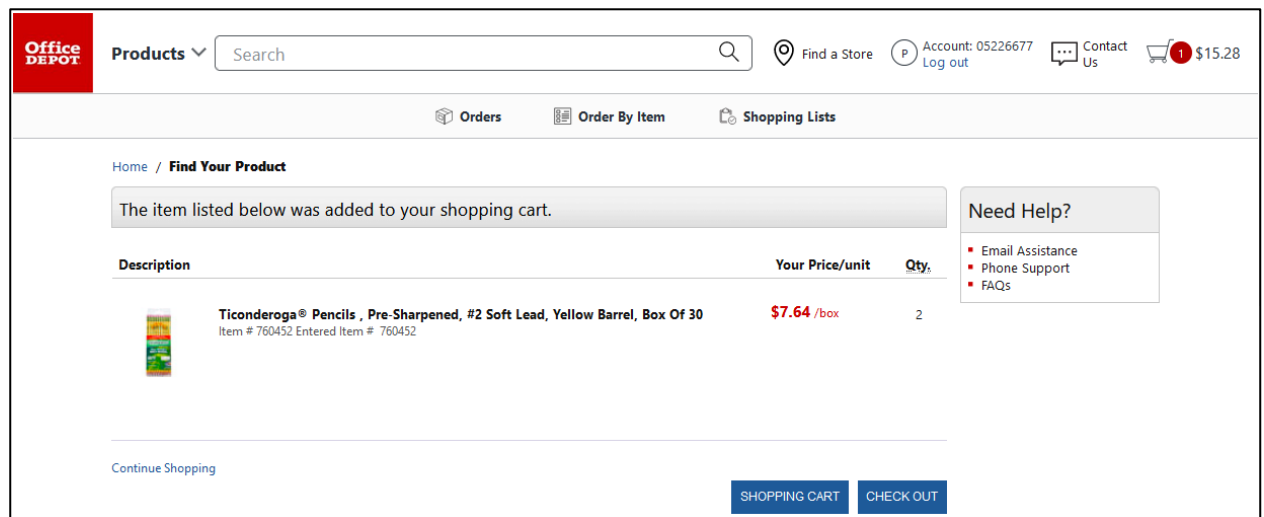
## Lesson 1: Create a Requisition

### Lecture 3: Creating a Requisition from Web Suppliers

**Shopping Cart Review Page:** The shopping cart review page will provide a summary of the item that was selected. The requisitioner will see a brief description of the item, unit price, and quantity.

**Note:** This page has several options that include the continue shopping, **SHOPPING CART**, and **CHECKOUT** buttons. Also, this information may vary based on the web supplier. For this training we will:

12. Select the **SHOPPING CART** button. This action will route the requisitioner to the shopping cart page.



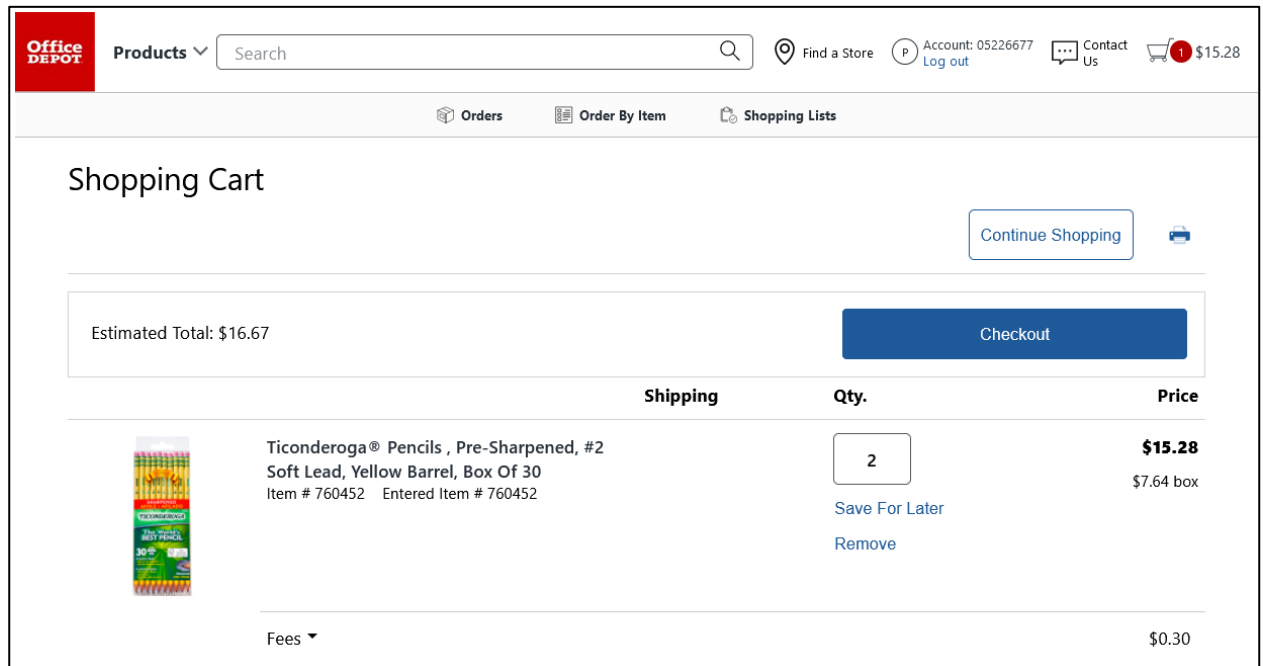
## Lesson 1: Create a Requisition

### Lecture 3: Creating a Requisition from Web Suppliers


**Shopping Cart Page:** The shopping cart page is the final step before the checkout. On this page, a requisitioner will see the estimated total, item details, quantities per item, unit price, and any additional fees that are applicable. Also, there are options to remove an item or continue shopping.

13. Select the **CHECKOUT** button. This action will route the requisitioner to the INFORMS checkout page.

**Note:** All items that have been selected on the web supplier catalog will be imported to the INFORMS checkout page. Technically, this is the last step in the external catalog. The remaining steps will occur inside of INFORMS.



The screenshot shows the Office Depot Shopping Cart page. At the top, there is a navigation bar with the Office Depot logo, a search bar, and links for 'Find a Store', 'Account: 05226677 Log out', 'Contact Us', and a shopping cart icon showing 1 item for \$15.28. Below the navigation bar, there are tabs for 'Orders', 'Order By Item', and 'Shopping Lists'. The main heading is 'Shopping Cart'. On the right, there is a 'Continue Shopping' button. Below this, a box displays the 'Estimated Total: \$16.67' and a large blue 'Checkout' button. The cart items are listed in a table with columns for 'Shipping', 'Qty.', and 'Price'. One item is shown: 'Ticonderoga® Pencils , Pre-Sharpended, #2 Soft Lead, Yellow Barrel, Box Of 30' with a quantity of 2 and a price of \$15.28. Below the item name, it says 'Item # 760452 Entered Item # 760452'. There are links for 'Save For Later' and 'Remove'. At the bottom, there is a 'Fees' section showing a total of \$0.30.


Shipping	Qty.	Price
 <p>Ticonderoga® Pencils , Pre-Sharpended, #2 Soft Lead, Yellow Barrel, Box Of 30 Item # 760452 Entered Item # 760452</p>	2	<p><b>\$15.28</b></p> <p>\$7.64 box</p>
Fees ▼		\$0.30

## Lesson 1: Create a Requisition

### Lecture 3: Creating a Requisition from Web Suppliers

**Checkout Page:** The checkout page is the last step before submitting the requisition for approval. The requisitioner will 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 will:

14. 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 will use the Requisition ID as the name. **IMPORTANT!** Several departments will use this field (e.g., Transit) to reflect the **EAMS Requisition ID**. This field is a required field for the EAMS and INFORMS integration.
15. Select the appropriate **PRIORITY** value to indicate to the approver the priority. The approver will have visibility to the priority field on the approver page.
  - i. Low
  - ii. Medium (system default)
  - iii. High
16. The **HEADER COMMENTS/ATTACHMENTS** button is available to enter comment text and add attachments. The additional comment functionality is available to display text on other transactions downstream (e.g., receipt, voucher).



**Create Requisition**

Continue Shopping Save Submit

**Checkout** Order Total 15.28 USD

**Requisition Summary**

Business Unit PR

Requisition Name EAMS REQ ID

Priority Medium

Header Comments/Attachments

Requester BURHST

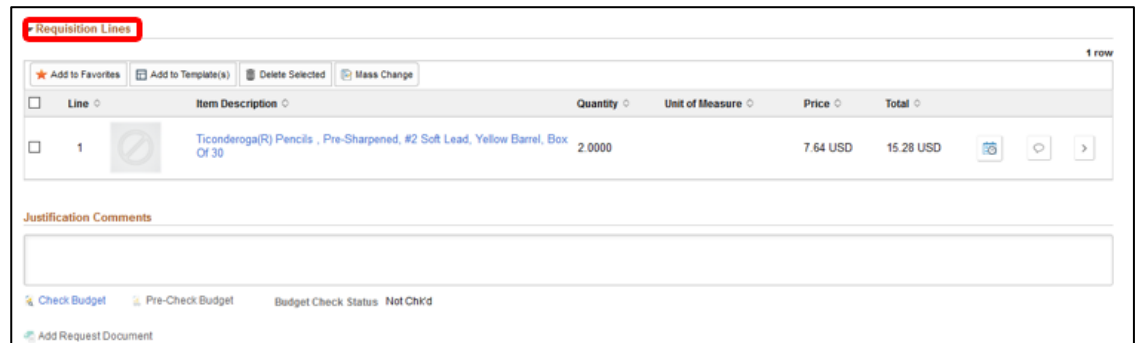
Currency USD

## Lesson 1: Create a Requisition

### Lecture 3: Creating a Requisition from Web Suppliers

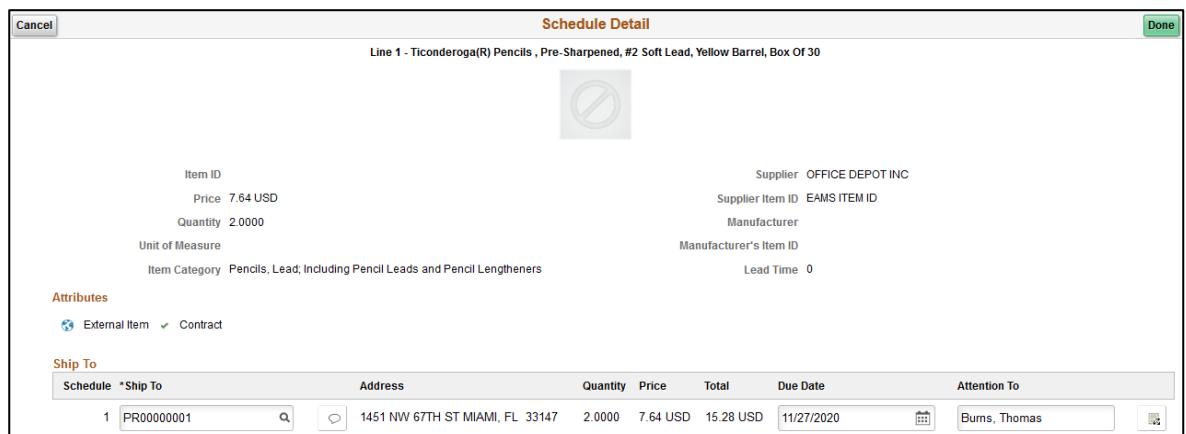
The **Requisition Lines** section (also known as the "Line," and the second layer of a requisition) display item details, add functionality, and access the other requisition layers.

17. The **ADD TO FAVORITES** button is available to add the selected lines to the favorites list for future use.
18. The **DELETE SELECTED** button deletes the selected requisition lines.
19. 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 and modify schedule details for an item.

20. Review or update the **SHIP TO** field. This field designates where the goods are received from a supplier. **IMPORTANT!** All ship to values start with the business unit prefix (i.e., TP for Transit), and if the correct value is not found. Notify the purchasing section, and then contact will be made to Central Procurement for location table updates.
21. Update the **DUE DATE** field. This field defines what date items are expected to arrive at the SHIP TO location.
22. Once the schedule detail page has been reviewed or updated, select the **DISTRIBUTION** icon, and the system will route to the Distribution page.



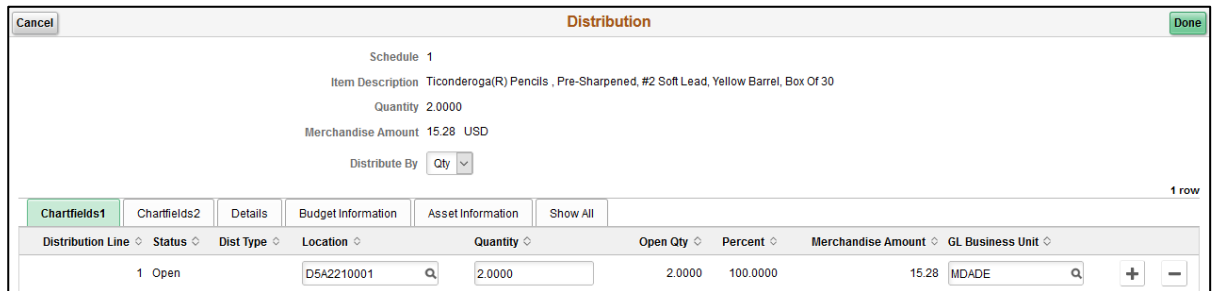
## Lesson 1: Create a Requisition

### Lecture 3: Creating a Requisition from Web Suppliers

**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. **IMPORTANT!** The accounting information entered at the beginning of the procure-to-pay process (requisition) will carry over to the purchase order and voucher. It is prudent that the correct ChartField values are added before the transaction is submitted for approval. This action will contribute to the prompt payment of a supplier.

23. The **GL BUSINESS UNIT** field will always display "MDADE" as a default value.

24. Select the **CHARTFIELD2**  tab.



Distribution Line	Status	Dist Type	Location	Quantity	Open Qty	Percent	Merchandise Amount	GL Business Unit
1	Open		D5A2210001	2.0000	2.0000	100.0000	15.28	MDADE

25. Enter a **FUND CODE** value.

26. Enter a **DEPARTMENT** value

27. Enter an **ACCOUNT** value

28. Enter a **GRANT** value.

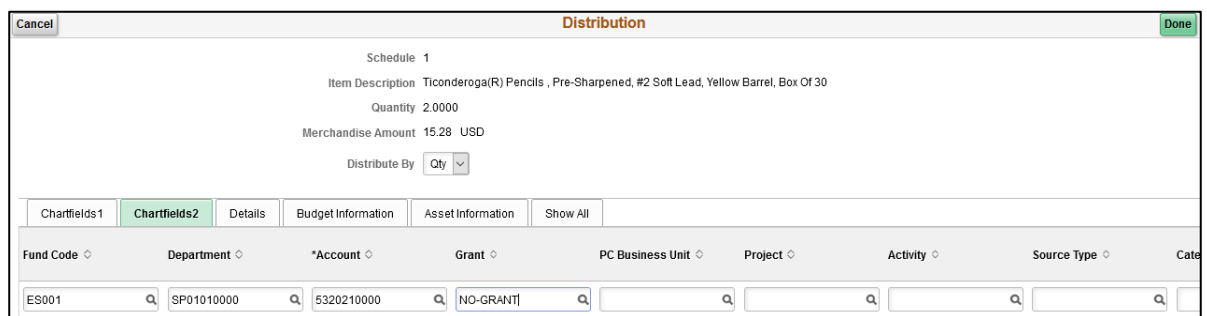
**Note:** A requisitioner must enter an actual grant value if this item is expensed to an active grant. If not, the "NO-GRANT" value must be selected.

## Lesson 1: Create a Requisition

### Lecture 3: Creating a Requisition from Web Suppliers

**IMPORTANT!** 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 it is not being expensed to a project.

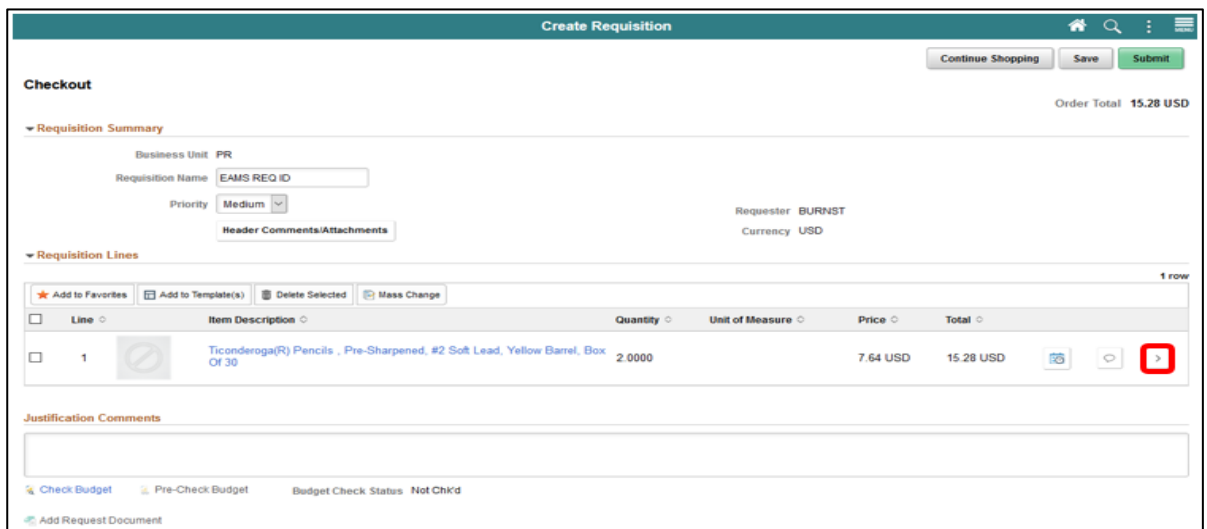
29. Enter a **PC BUSINESS UNIT** value. This field should reflect the Business Unit of the requestor.
30. Enter a **PROJECT** value. This value is created in the Project Costing module.
31. Enter an **ACTIVITY** value. The activity value represents a subtask in project costing (i.e., Planning, Design).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



33. Select the **DONE** button when all ChartField values have been selected. The system will return to the Checkout page.

**IMPORTANT!** The following instruction is for departments (i.e., Transit) that leverage the EAMS and INFORMS integration.

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

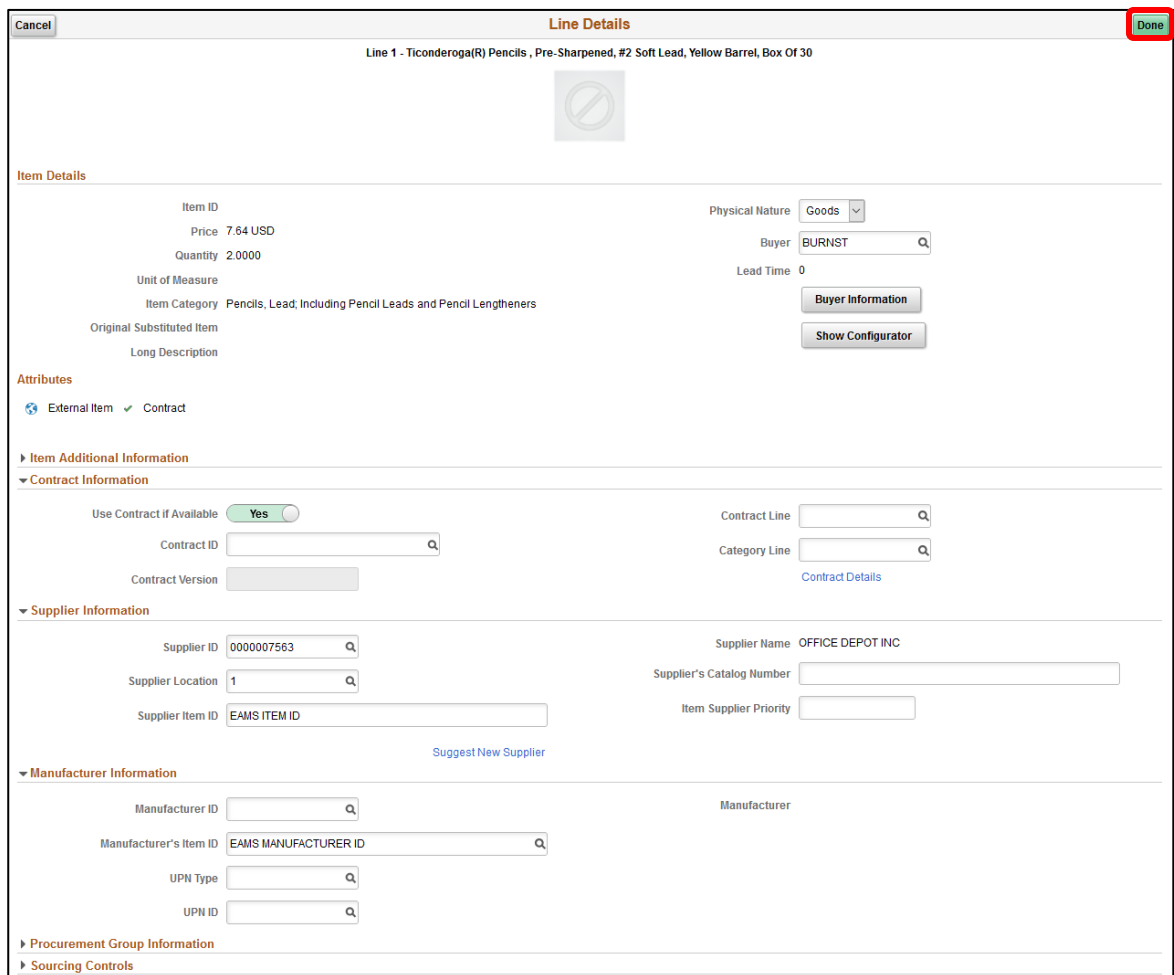


## Lesson 1: Create a Requisition

### Lecture 3: Creating a Requisition from Web Suppliers

**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 that I will highlight, which are vital for the EAMS and INFORMS integration.

35. Enter the **SUPPLIER CATALOG NUMBER** value. **IMPORTANT!** Several departments will use this field (e.g., Transit) to reflect the **EAMS Requisition ID**. This field is a required field for the EAMS and INFORMS integration.
36. Enter the **MANUFACTURER'S ITEM ID** value. **IMPORTANT!** Several departments will use this field (e.g., Transit) to reflect the **EAMS Manufacturer ID**. This field is a required field for the EAMS and INFORMS integration.
37. Select the **DONE** button when all the relevant fields have been updated and verified. The system will then route to the Checkout page.



**Line Details** Done

Line 1 - Ticonderoga(R) Pencils, Pre-Sharpened, #2 Soft Lead, Yellow Barrel, Box Of 30

**Item Details**

Item ID: [Field]  
 Price: 7.64 USD  
 Quantity: 2.0000  
 Unit of Measure: [Field]  
 Item Category: Pencils, Lead, Including Pencil Leads and Pencil Lengtheners  
 Original Substituted Item: [Field]  
 Long Description: [Field]

Physical Nature: Goods  
 Buyer: BURNST  
 Lead Time: 0  
[Buyer Information](#)  
[Show Configurator](#)

**Attributes**

External Item ☒ Contract ☐

**Item Additional Information**

**Contract Information**

Use Contract If Available: ☒ Yes  
 Contract ID: [Field]  
 Contract Version: [Field]  
 Contract Line: [Field]  
 Category Line: [Field]  
[Contract Details](#)

**Supplier Information**

Supplier ID: 0000007563  
 Supplier Location: 1  
 Supplier Item ID: EAMS ITEM ID  
 Supplier Name: OFFICE DEPOT INC  
 Supplier's Catalog Number: [Field]  
 Item Supplier Priority: [Field]  
[Suggest New Supplier](#)

**Manufacturer Information**

Manufacturer ID: [Field]  
 Manufacturer's Item ID: EAMS MANUFACTURER ID  
 UPN Type: [Field]  
 UPN ID: [Field]  
 Manufacturer: [Field]

**Procurement Group Information**

**Sourcing Controls**

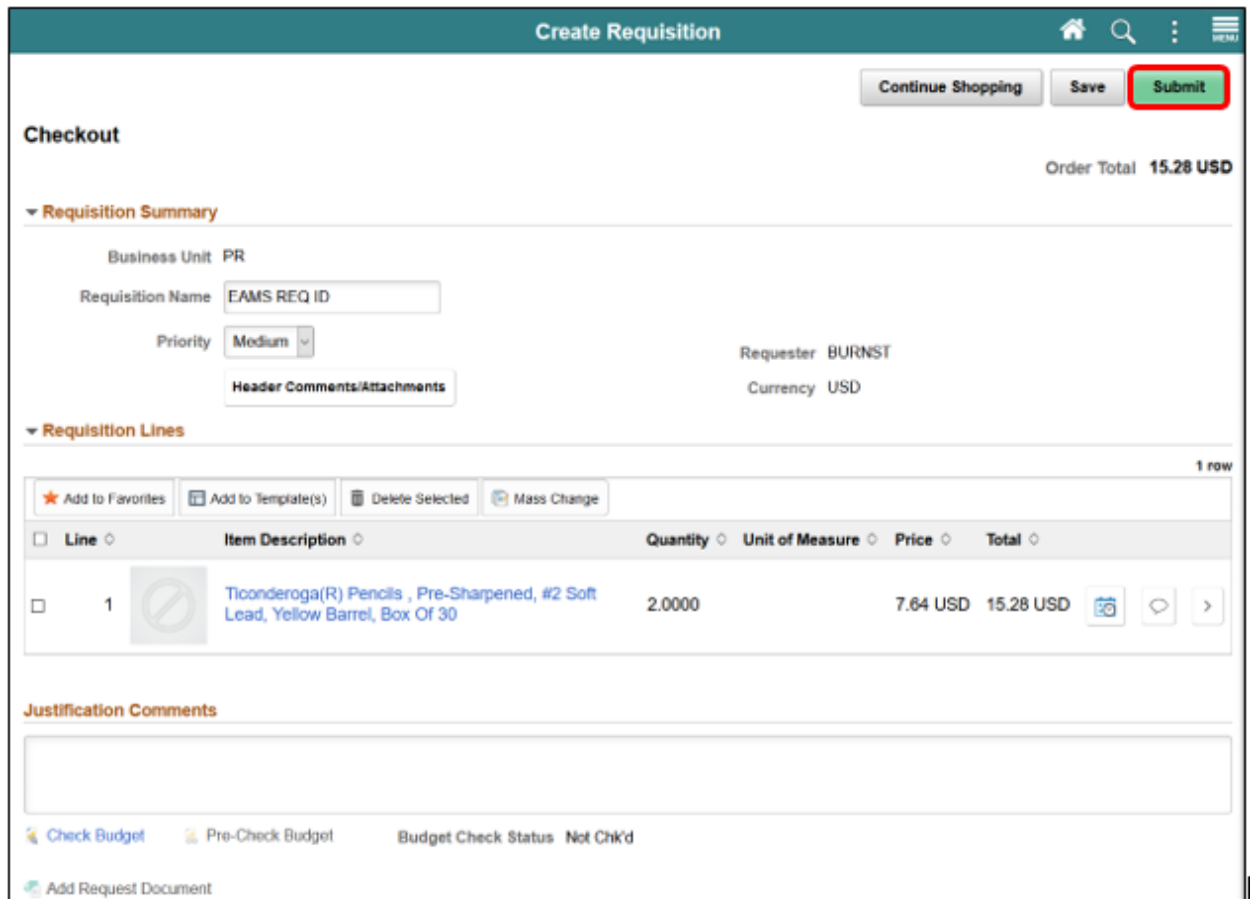


## Lesson 1: Create a Requisition

### Lecture 3: Creating a Requisition from Web Suppliers

**IMPORTANT!** 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.

38. Select the **SUBMIT** button when all relevant fields have been updated. The system will route to the Save Confirmation page.



**Create Requisition**

Continue Shopping Save **Submit**

**Checkout** Order Total **15.28 USD**

**Requisition Summary**

Business Unit PR

Requisition Name EAMS REQ ID

Priority Medium

Header Comments/Attachments

Requester BURNST

Currency USD

**Requisition Lines** 1 row

★ Add to Favorites Add to Template(s) Delete Selected Mass Change

Line	Item Description	Quantity	Unit of Measure	Price	Total
1	Ticonderoga(R) Pencils , Pre-Sharpened, #2 Soft Lead, Yellow Barrel, Box Of 30	2.0000		7.64 USD	15.28 USD

**Justification Comments**

Check Budget Pre-Check Budget Budget Check Status Not Chk'd

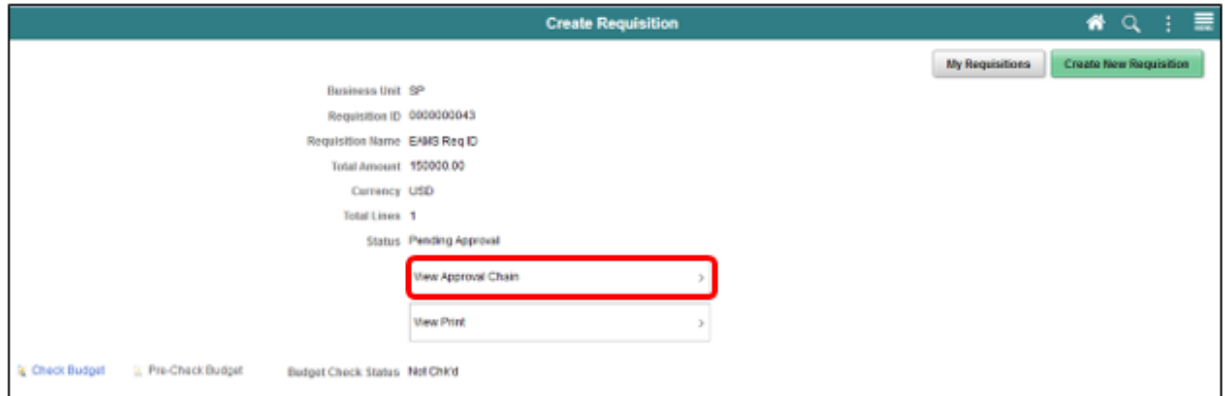
Add Request Document

## Lesson 1: Create a Requisition

### Lecture 3: Creating a Requisition from Web Suppliers

**Save Confirmation Page:** The Save confirmation page is intended to enable the requisitioner to view a summary of the final requisition. Also, it provides access to preview the approval workflow and to print the requisition.

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

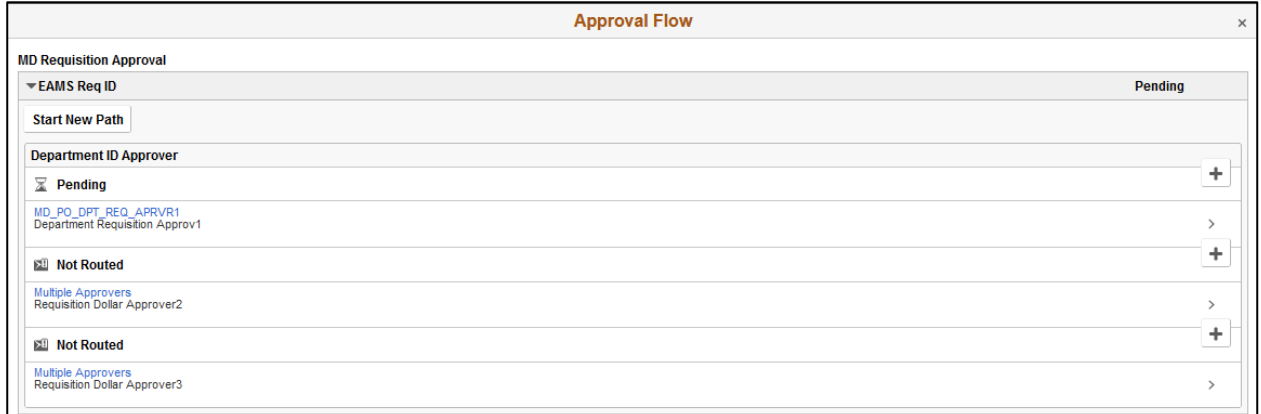


The screenshot shows the 'Create Requisition' page with the following details:

- Business Unit: SP
- Requisition ID: 000000043
- Requisition Name: EAMS Req ID
- Total Amount: 150000.00
- Currency: USD
- Total Lines: 1
- Status: Pending Approval

At the bottom, there are two buttons: 'View Approval Chain' (highlighted with a red box) and 'View Print'. The page also includes a 'My Requisitions' button and a 'Create New Requisition' button in the top right corner.

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



The screenshot shows the 'Approval Flow' window for 'MD Requisition Approval'. The status is 'Pending'. The workflow steps are as follows:

- Start New Path**
- Department ID Approver**
  - Pending (with a plus icon)
  - MD\_PO\_DPT\_REQ\_APRVR1 (with a right arrow)
  - Department Requisition Approv1 (with a plus icon)
- Not Routed** (with a plus icon)
  - Multiple Approvers (with a right arrow)
  - Requisition Dollar Approver2 (with a plus icon)
- Not Routed** (with a plus icon)
  - Multiple Approvers (with a right arrow)
  - Requisition Dollar Approver3 (with a plus icon)

## Lesson 1: Training Activity 2

**Demonstration** The Instructor will now demonstrate how to execute the business process through the INFORMS training environment.

**Instructions** Please refer to Activity 2 on the SCM 201 Training Activity and Data Sheet.

This activity will be performed individually; users must complete it on their workstation using the INFORMS training environment. Instructors will explain how to log into INFORMS.

Users will perform the activity by following the SCM 201 Training Activity Guide and Data Sheet and by using the training materials as reference tools.

Instructors are available to answer any questions.

## Lesson 1: Training Exercise 3

### Debrief

Which two web suppliers are currently available?



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(True/False) the web supplier checkout page is where you will submit for approval all items selected from the web supplier catalog.

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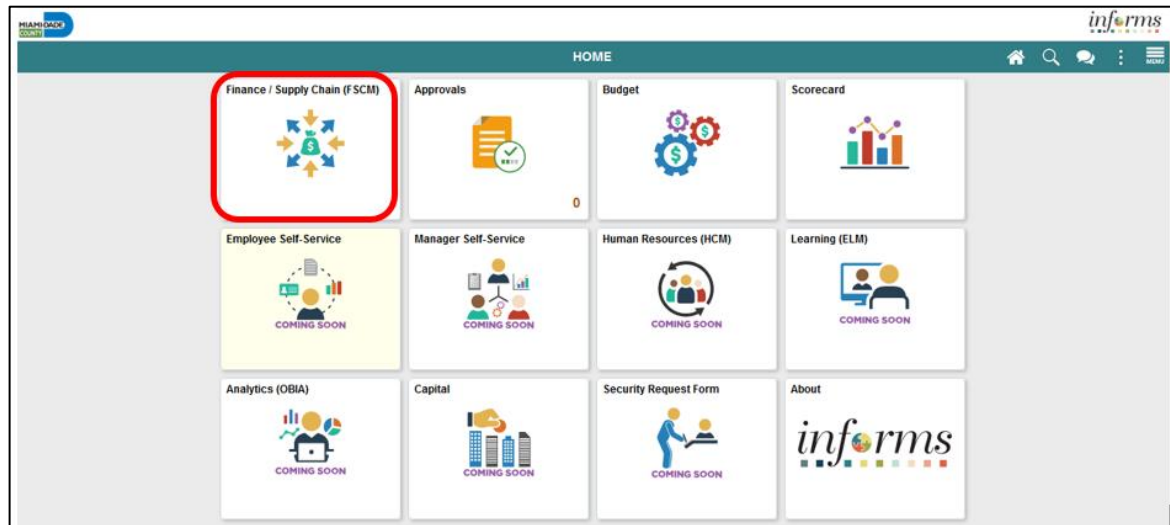
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## Lesson 1: Create a Requisition

### Lecture 4: Creating a Special Request

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

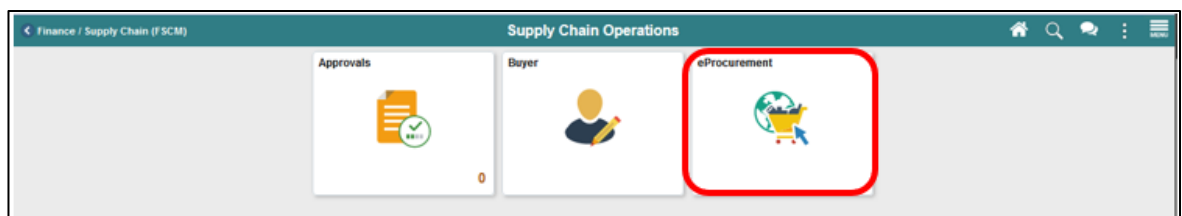
1. Login into **INFORMS** and select the **FINANCE/SUPPLY CHAIN (FSCM)** tile.



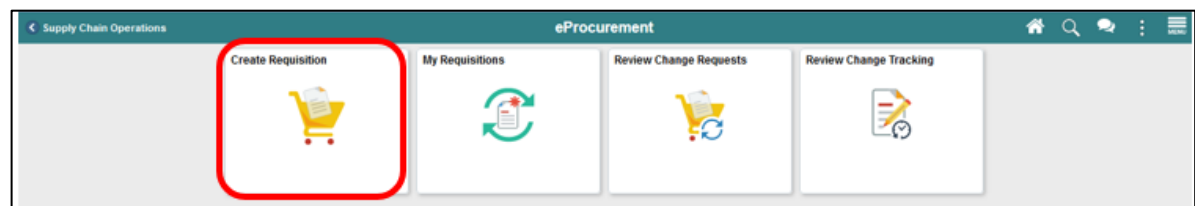
2. Select the **SUPPLY CHAIN OPERATION** tile.



3. Select the **Eprocurement** tile.



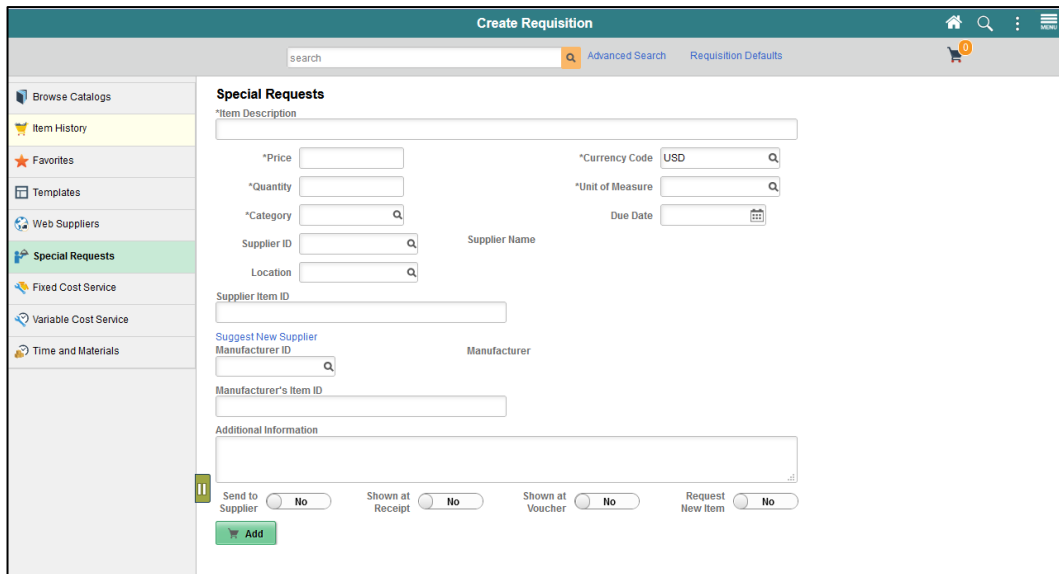
4. Select the **CREATE REQUISITION** tile.



## Lesson 1: Create a Requisition

### Lecture 4: Creating a Special Request

**What is a Special Request?** A **Special Request** is used to create a requisition for items and 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.



The screenshot shows the 'Create Requisition' interface with a sidebar on the left containing navigation links: Browse Catalogs, Item History, Favorites, Templates, Web Suppliers, Special Requests (highlighted), Fixed Cost Service, Variable Cost Service, and Time and Materials. The main form is titled 'Special Requests' and includes the following fields and controls:

- \*Item Description**: A text input field.
- \*Price**: A text input field.
- \*Quantity**: A text input field.
- \*Category**: A dropdown menu with a search icon.
- Supplier ID**: A text input field with a search icon.
- Location**: A text input field with a search icon.
- Supplier Item ID**: A text input field.
- Suggest New Supplier**: A button.
- Manufacturer ID**: A text input field with a search icon.
- Manufacturer's Item ID**: A text input field.
- \*Currency Code**: A dropdown menu with 'USD' selected and a search icon.
- \*Unit of Measure**: A dropdown menu with a search icon.
- Due Date**: A date picker.
- Additional Information**: A large text area.
- Send to Supplier**: A toggle switch set to 'No'.
- Shown at Receipt**: A toggle switch set to 'No'.
- Shown at Voucher**: A toggle switch set to 'No'.
- Request New Item**: A toggle switch set to 'No'.
- Add**: A green button with a shopping cart icon.

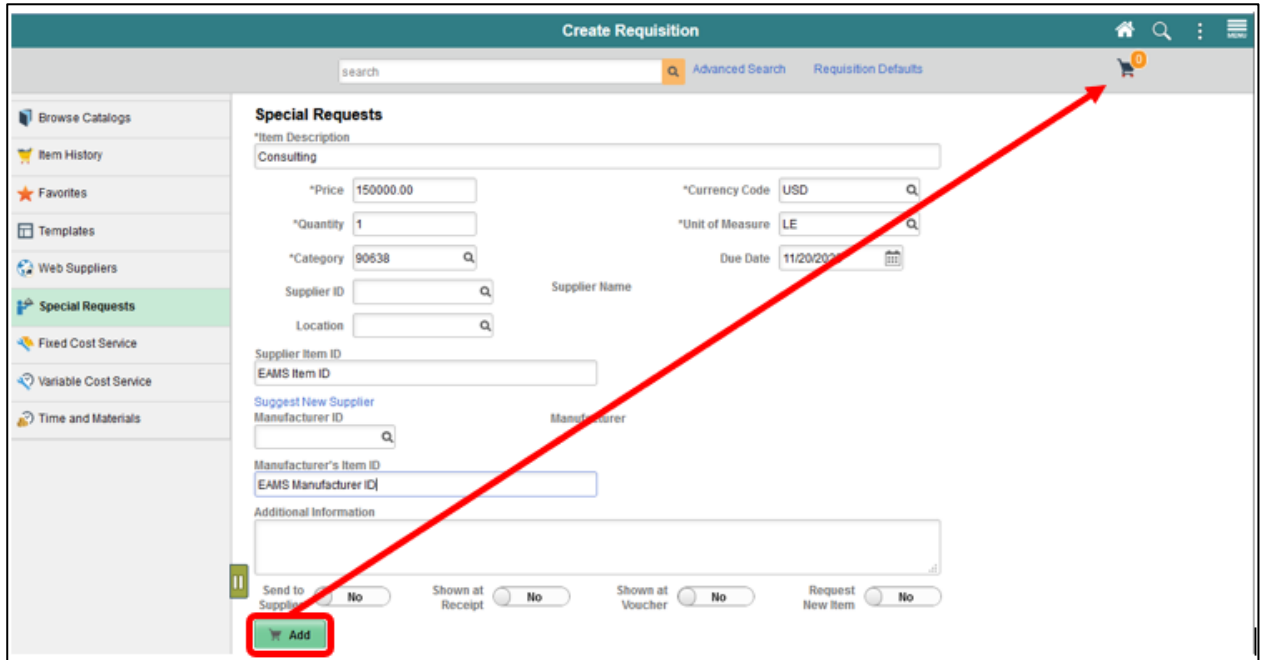
Common fields used in a special request:

- **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 will utilize this field (e.g., Transit) to display the EAMS Manufacturer ID. The field will be 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 will utilize this field (e.g., Transit) to display the EAMS Item ID. This field will be key for integrations between EAMS and INFORMS.
- **Unit of Measure (UOM)** – Select the type of unit by which the item will be shipped to the requisitioner (e.g., EA, BX, LE).

## Lesson 1: Create a Requisition

### Lecture 4: Creating a Special Request

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



The screenshot displays the 'Create Requisition' interface. On the left is a sidebar with navigation options: Browse Catalogs, Item History, Favorites, Templates, Web Suppliers, **Special Requests** (highlighted), Fixed Cost Service, Variable Cost Service, and Time and Materials. The main area is titled 'Special Requests' and contains a form for 'Consulting'. The form includes fields for:
 

- \*Item Description: Consulting
- \*Price: 150000.00
- \*Quantity: 1
- \*Category: 90638
- \*Currency Code: USD
- \*Unit of Measure: LE
- Supplier ID
- Supplier Name
- Location
- Due Date: 11/20/2020
- Supplier Item ID
- EAMS Item ID
- Suggest New Supplier
- Manufacturer ID
- Manufacturer's Item ID
- EAMS Manufacturer ID
- Additional Information

 At the bottom of the form, there are several toggle switches: 'Send to Supplier' (set to No), 'Shown at Receipt' (set to No), 'Shown at Voucher' (set to No), and 'Request New Item' (set to No). A green 'Add' button is located at the bottom left of the form. A red arrow points from this 'Add' button to the shopping cart icon in the top right corner of the page, which has a '0' next to it.

## Lesson 1: Create a Requisition

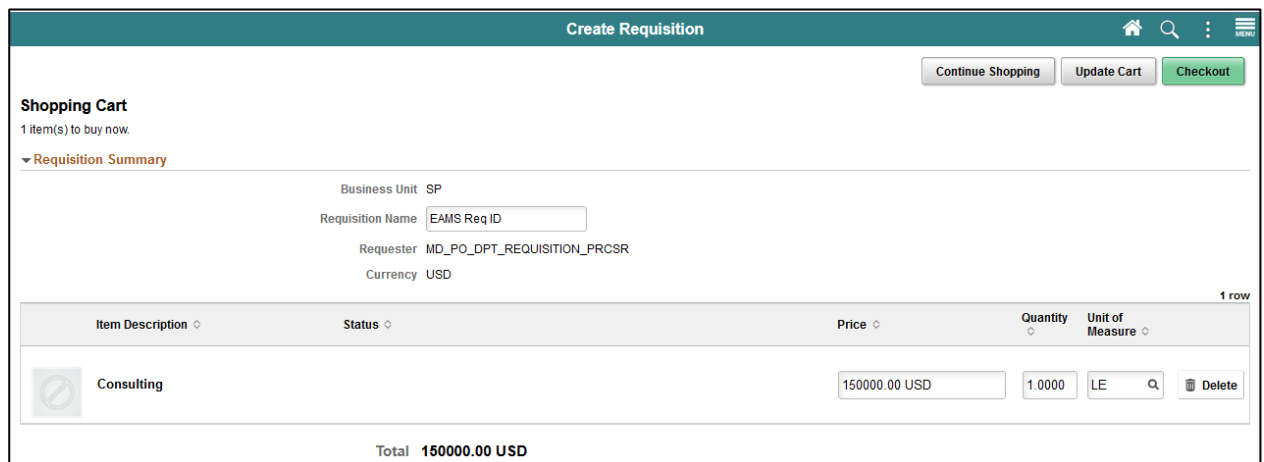
### Lecture 4: Creating a Special Request

**Shopping Cart Page:** The shopping cart page enables the requestor to review and update the shopping cart before proceeding to the **CHECKOUT** page. Below are some of the actions and options available:

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

**IMPORTANT!** Several departments will use this field (e.g., Transit) to reflect the **EAMS Requisition ID**. This field will be required for the 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.
- Changes have been made to the shopping cart, it will necessary to select the **UPDATE CART** button to save any changes.



The screenshot displays the 'Create Requisition' interface. At the top, there are navigation icons and a search bar. Below the header, there are three buttons: 'Continue Shopping', 'Update Cart', and 'Checkout'. The main section is titled 'Shopping Cart' and indicates '1 item(s) to buy now'. A 'Requisition Summary' section shows the following details:

- Business Unit: SP
- Requisition Name: EAMS Req ID
- Requester: MD\_PO\_DPT\_REQUISITION\_PRCR
- Currency: USD

Below the summary is a table with the following columns: Item Description, Status, Price, Quantity, and Unit of Measure. The table contains one row for 'Consulting' with a price of 150000.00 USD, a quantity of 1.0000, and a unit of measure of LE. A 'Delete' button is next to the item. At the bottom, the total is displayed as 150000.00 USD.

Item Description	Status	Price	Quantity	Unit of Measure
Consulting		150000.00 USD	1.0000	LE

Total 150000.00 USD



## Lesson 1: Create a Requisition

### Lecture 4: Creating a Special Request

**Checkout Page:** The checkout page is the last step before submitting the requisition for approval. The requisitioner will 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 will:

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 will use the Requisition ID as the name. **IMPORTANT!** Several departments will use this field (e.g., Transit) to reflect the **EAMS Requisition ID**. This field is a required field for the EAMS and INFORMS integration.
8. Select the appropriate **PRIORITY** value to indicate to the approver the priority. The approver will have visibility to the priority field on the approver page.
  - i. Low
  - ii. Medium (system default)
  - iii. High

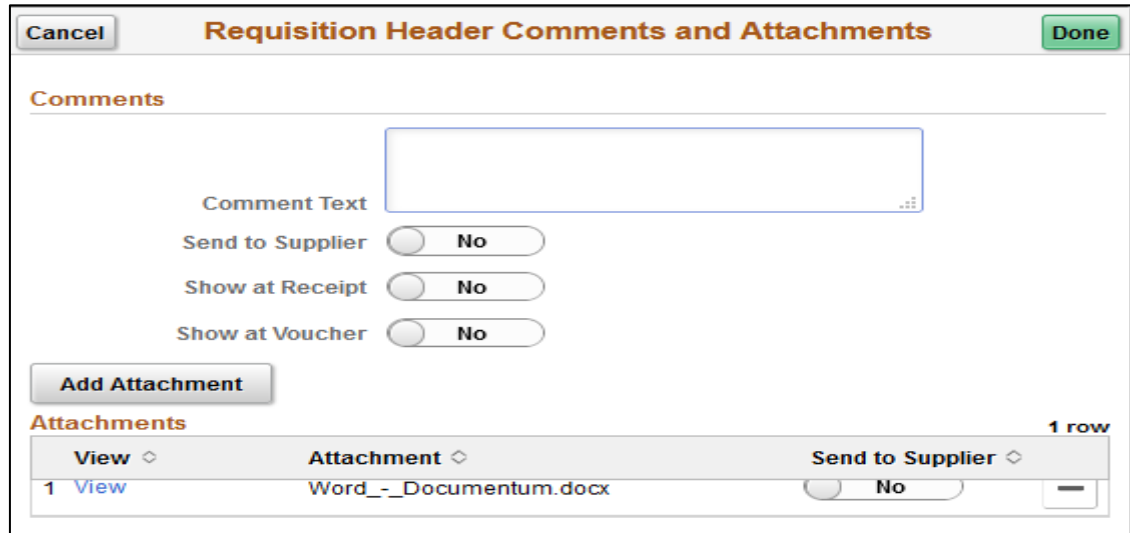


## Lesson 1: Create a Requisition

### Lecture 4: Creating a Special Request

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

**IMPORTANT!** 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 will leverage this information for the creation of a sourcing event.



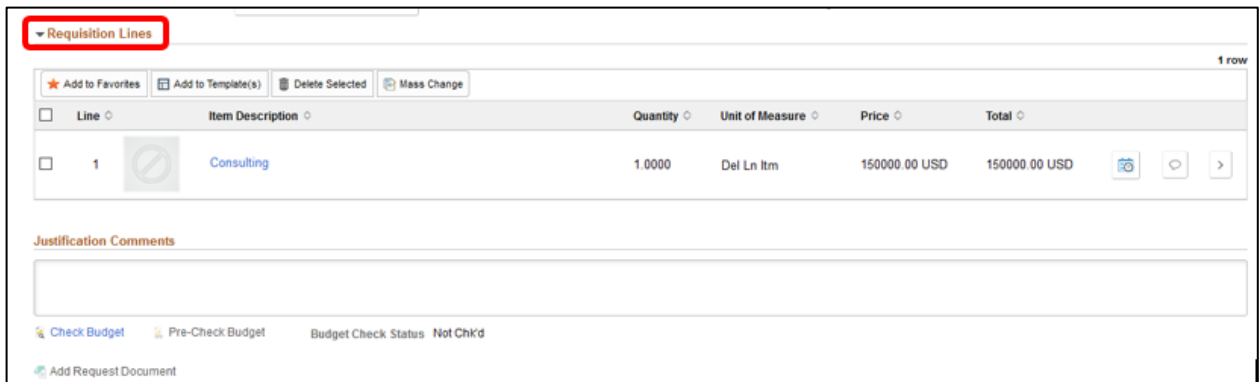
The dialog box is titled "Requisition Header Comments and Attachments" and has "Cancel" and "Done" buttons. It contains a "Comments" section with a text area for "Comment Text". Below this are three toggle switches: "Send to Supplier" (set to No), "Show at Receipt" (set to No), and "Show at Voucher" (set to No). There is an "Add Attachment" button. The "Attachments" section shows a table with 1 row:

View	Attachment	Send to Supplier
1 View	Word_-_Documentum.docx	No

The **Requisition Lines** section (also known as the "Line," and the second layer of a requisition) display item details, adds functionality, and accesses the 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.



The "Requisition Lines" section shows a table with 1 row:

Line	Item Description	Quantity	Unit of Measure	Price	Total
1	Consulting	1.0000	Del Ln Itm	150000.00 USD	150000.00 USD

Below the table is a "Justification Comments" text area. At the bottom, there are buttons for "Check Budget", "Pre-Check Budget", "Add Request Document", and a "Budget Check Status" indicator showing "Not Chk'd".

## Lesson 1: Create a Requisition

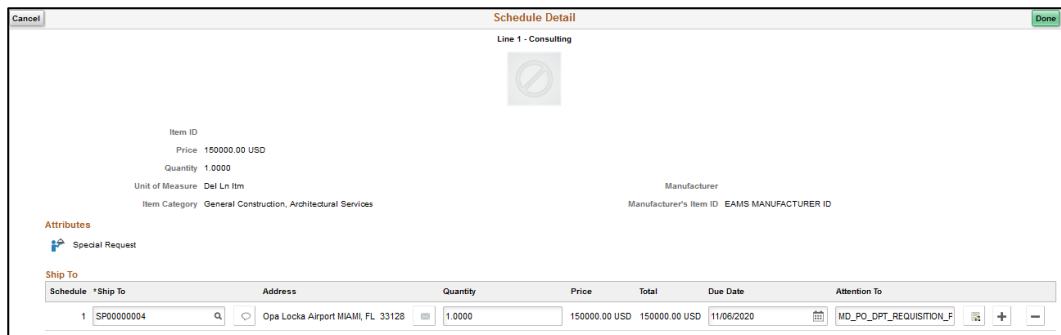
### Lecture 4: Creating a Special Request

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

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

**Note:** All ship to values start 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.

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

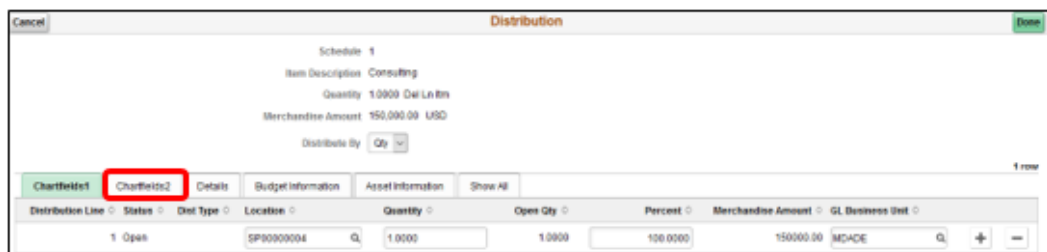


**Distribution Page:** The Distribution Page is the fourth layer of a requisition used to enter accounting information (ChartFields). There are several tabs on this page, but we will only concentrate on the **CHARTFIELDS 1** and **CHARTFIELDS 2** tabs.

**IMPORTANT!** The accounting information entered at the beginning of the procure-to-pay process (requisition) will carry over to the purchase order and voucher. It is prudent that the correct ChartField values are added before the transaction is submitted for approval. This action will contribute to the prompt payment of a supplier.

The **GL BUSINESS UNIT** field will always display "MDADE" as a default value.

- Select the **CHARTFIELD2** tab.



## Lesson 1: Create a Requisition

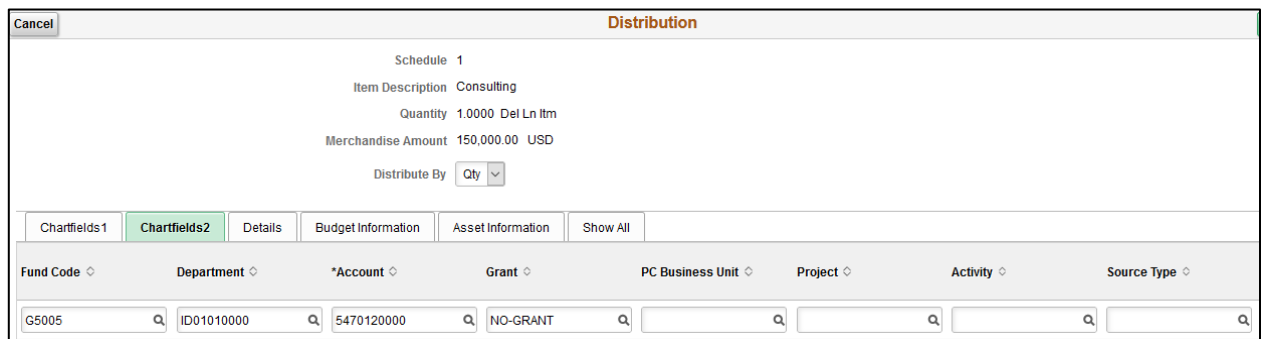
### Lecture 4: Creating a Special Request

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.

**IMPORTANT!** 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.



Cancel Distribution

Schedule 1

Item Description Consulting

Quantity 1.0000 Del Ln Itm

Merchandise Amount 150,000.00 USD

Distribute By Qty

Chartfields1 **Chartfields2** Details Budget Information Asset Information Show All

Fund Code	Department	*Account	Grant	PC Business Unit	Project	Activity	Source Type
G5005	ID01010000	5470120000	NO-GRANT				

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

The system will then return to the Checkout page.

## Lesson 1: Create a Requisition

### Lecture 4: Creating a Special Request

**IMPORTANT!** 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.

**Create Requisition**

Continue Shopping Save Submit

Order Total 150000.00 USD





**Checkout**

**Requisition Summary**

Business Unit SP  
 Requisition Name EAMS Req ID  
 Priority Medium  
 Header Comments/Attachments  
 Requester MD\_PO\_DPT\_REQUISITION\_PRCR  
 Currency USD

**Requisition Lines** 1 row

★ Add to Favorites Add to Template(s) Delete Selected Mass Change

Line	Item Description	Quantity	Unit of Measure	Price	Total	
1	 Consulting	1.0000	Del Ln Itm	150000.00 USD	150000.00 USD	  

**Justification Comments**

Check Budget Pre-Check Budget Budget Check Status Not Chkd

Add Request Document

## Lesson 1: Create a Requisition

### Lecture 4: 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 that I will highlight, which are vital for the EAMS and INFORMS integration.

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

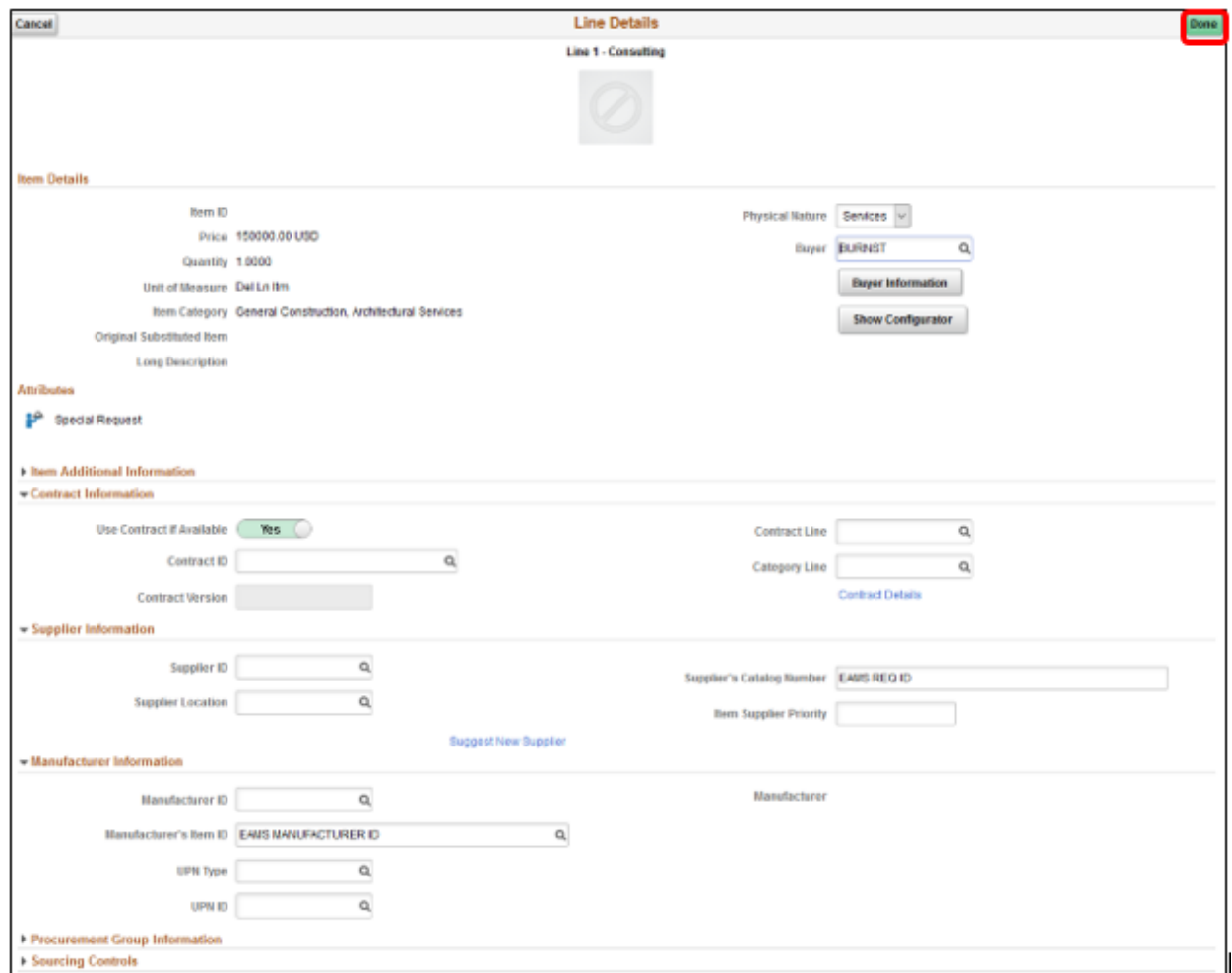
**IMPORTANT!** Several departments will use this field (e.g., Transit) to reflect the **EAMS Requisition ID**. This field is a required field for the EAMS and INFORMS integration.

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

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

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

The system will then route to the Checkout page.



The screenshot displays the 'Line Details' page for 'Line 1 - Consulting'. The page is divided into several sections:

- Item Details:** Includes fields for Item ID, Price (150000.00 USD), Quantity (1.0000), Unit of Measure (Dollars), Item Category (General Construction, Architectural Services), Original Substituted Item, and Long Description.
- Attributes:** Includes a 'Special Request' checkbox.
- Item Additional Information:**
  - Contract Information:** Includes 'Use Contract if Available' (set to Yes), Contract ID, Contract Version, Contract Line, and Category Line.
  - Supplier Information:** Includes Supplier ID, Supplier Location, Supplier's Catalog Number (EAMS REQ ID), and Item Supplier Priority.
  - Manufacturer Information:** Includes Manufacturer ID, Manufacturer's Item ID (EAMS MANUFACTURER ID), UFN Type, and UFN ID.
- Procurement Group Information** and **Sourcing Controls** sections are partially visible at the bottom.

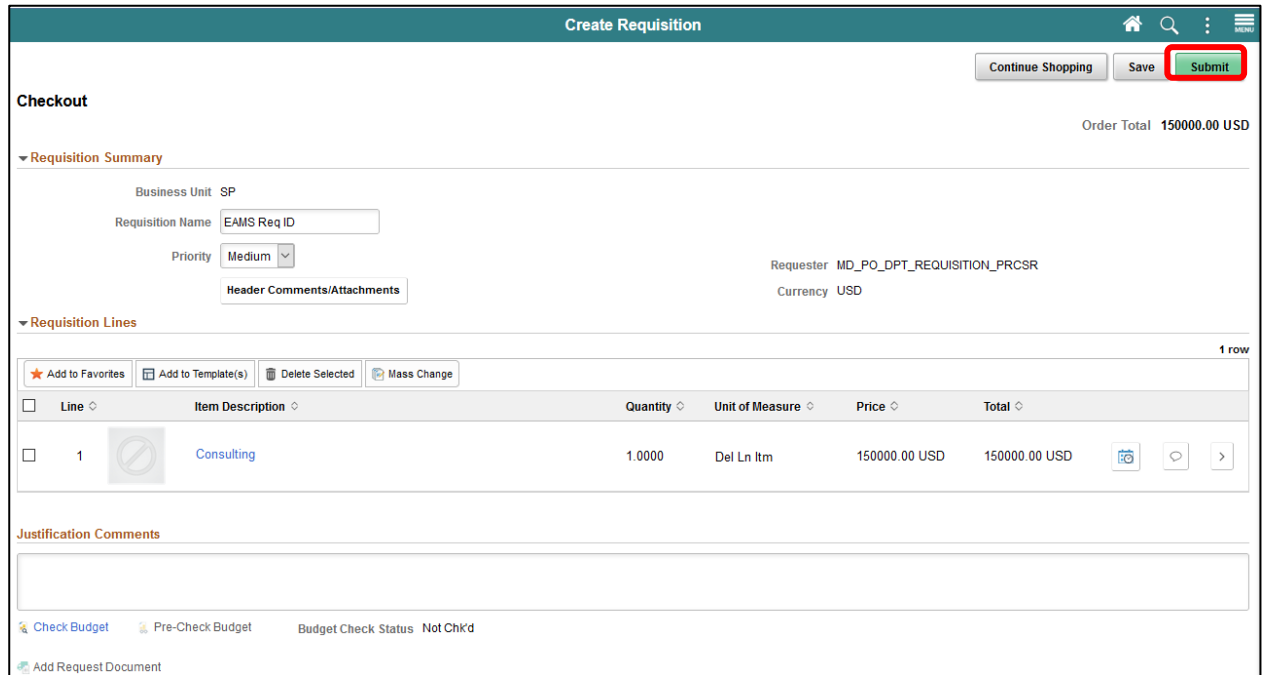
A red box highlights the 'Done' button in the top right corner of the page.

## Lesson 1: Create a Requisition

### Lecture 4: Creating a Special Request

**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.

27. Select the **SUBMIT** button when all relevant fields have been updated. The system will then route to the Save Confirmation page.

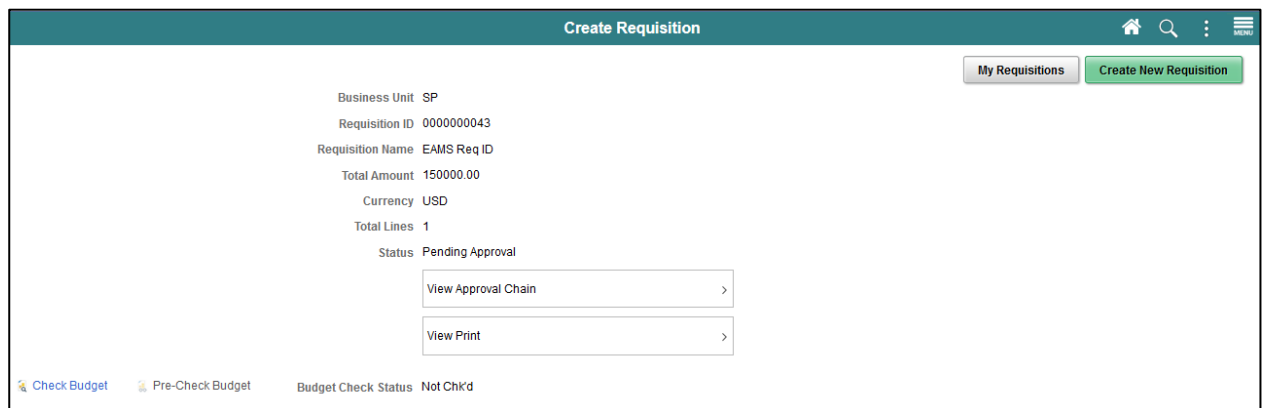


The screenshot shows the 'Create Requisition' page in the 'Checkout' section. The 'Submit' button is highlighted with a red box. The page displays the following information:

- Order Total:** 150000.00 USD
- Requisition Summary:**
  - Business Unit: SP
  - Requisition Name: EAMS Req ID
  - Priority: Medium
  - Requester: MD\_PO\_DPT\_REQUISITION\_PRCR
  - Currency: USD
  - Header Comments/Attachments
- Requisition Lines:**
  - 1 row
  - Line 1: Consulting, Quantity 1.0000, Unit of Measure Del Ln Itm, Price 150000.00 USD, Total 150000.00 USD
- Justification Comments:** (Empty text area)
- Check Budget:** Pre-Check Budget, Budget Check Status Not Chk'd
- Add Request Document:** (Link)

**Save Confirmation Page:** The Save confirmation page is intended to enable the requisitioner to view a summary of the final requisition. Also, it 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.



The screenshot shows the 'Create Requisition' page in the 'Save Confirmation' section. The 'View Approval Chain' button is highlighted. The page displays the following information:

- My Requisitions** (Link) **Create New Requisition** (Link)
- Business Unit:** SP
- Requisition ID:** 0000000043
- Requisition Name:** EAMS Req ID
- Total Amount:** 150000.00
- Currency:** USD
- Total Lines:** 1
- Status:** Pending Approval
- View Approval Chain** (Button)
- View Print** (Button)
- Check Budget:** Pre-Check Budget, Budget Check Status Not Chk'd

## Lecture 4: Creating a Special Request

Approval Flow	
<b>MD Requisition Approval</b>	
▼ EAMS Req ID	Pending
<b>Start New Path</b>	
Department ID Approver	
⌵ Pending	+
<a href="#">MD_PO_DPT_REQ_APRVR1</a> Department Requisition Approv1	
⌵ Not Routed	+
<a href="#">Multiple Approvers</a> Requisition Dollar Approver2	
⌵ Not Routed	+
<a href="#">Multiple Approvers</a> Requisition Dollar Approver3	



## Lesson 1: Training Activity 3

**Demonstration** The Instructor will now demonstrate how to execute the business process through the INFORMS training environment.

**Instructions** Please refer to Activity 3 on the SCM 201 Training Activity and Data Sheet.

This activity will be performed individually; users must complete it on their workstation using the INFORMS training environment. Instructors will explain how to log into INFORMS.

Users will perform the activity by following the SCM 201 Training Activity Guide and Data Sheet and by using the training materials as reference tools.

Instructors are available to answer any questions.

## Lesson 1: Training Exercise 4

### Debrief



(True/False) A special request can be routed to the MDC Item Master to establish or activate a new NIGP item or item category.

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Which page allows a user to view a summary of the final requisition and provides access to preview the approval workflow and to print the requisition?

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## Lesson Summary



- Select an Item
- Create a Requisition from the Master Item Catalog
- Create a requisition from Web Suppliers
- Create a Special Request

## Module 3: Managing a Requisition

Module 3:  
Course  
Introduction  
Summary

This module includes the following lessons:

- Lesson 1 – Manage a Requisition
- Lesson 2 – Approve a Requisition



## Module 3: Managing a Requisition

### Lesson 1: Introduction

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

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

## Lesson 1: Manage a Requisition

### Key Terms



The following key terms are used in this Lesson:

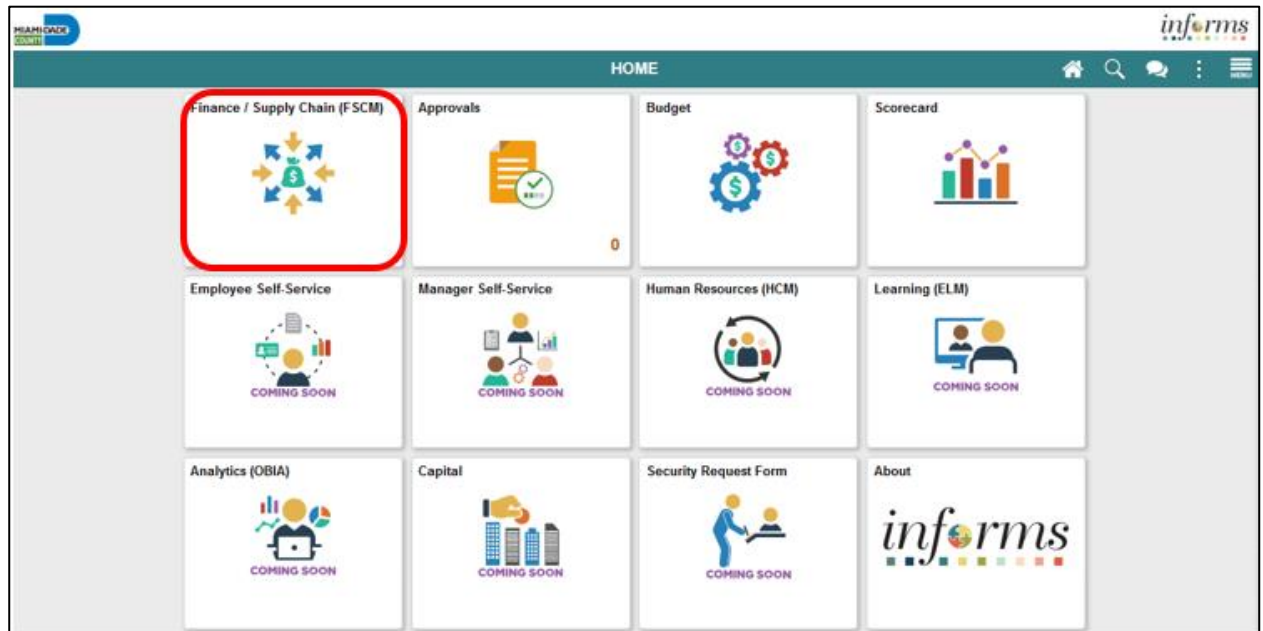
Term	Definition
<b>Checkout Page</b>	The last step before submitting the requisition for approval.
<b>Distribution Page</b>	The Distribution Page is the fourth layer of a requisition used to enter accounting information (ChartFields).
<b>Edit Requisition Page</b>	The Edit Requisition Page enables the requisitioner to make changes to the requisition.
<b>My Requisitions Page</b>	Used to view or take action on requisitions created by the requisitioner.
<b>Requisition Lines section</b>	Also known as the “Line,” and the second layer of a requisition, the requisition lines section displays item details, adds functionality, and accesses the other requisition layers.
<b>Requisition Summary</b>	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).
<b>Save Confirmation Page</b>	The Save Confirmation Page is intended to enable the requisitioner to view a summary of the final requisition.
<b>Schedule Detail Page</b>	The Schedule Detail Page is the third layer of a requisition and it is used to review and modify schedule details for an item.
<b>Shopping Cart Page</b>	Enables the requestor to review and update the shopping cart before proceeding to the checkout page.

## Lesson 1: Manage a Requisition

### Lecture 1: Copy a Requisition

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

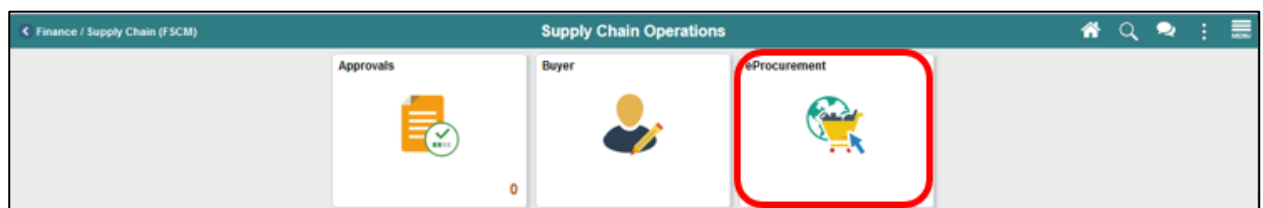
1. Login into **INFORMS** and select the **FINANCE/SUPPLY CHAIN (FSCM)**



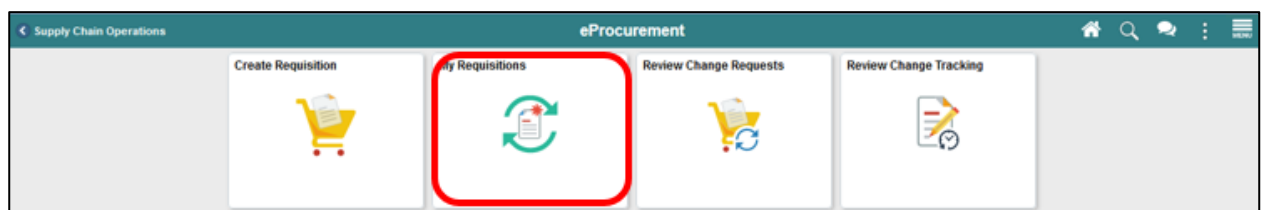
2. Select the **SUPPLY CHAIN OPERATION** tile.



3. Select the **ePROCUREMENT** tile.



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



## Lesson 1: Manage a Requisition

### Lecture 1: Copy a Requisition

#### Common Elements Used in My Requisition:

The **FILTER BY** button is used to narrow the search 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

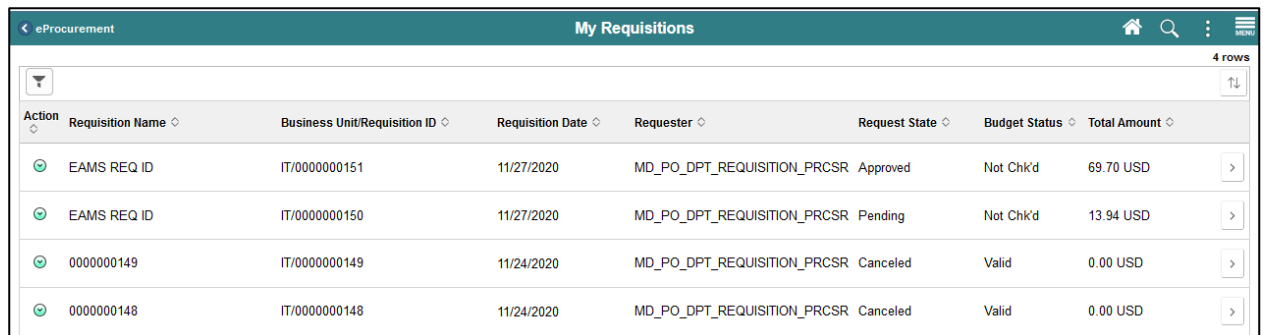
The **VIEW DETAILS** button is used for the Line Details page.

**My Requisition Page:** My requisitions page is used to view or take action on requisitions created by the requisitioner. The page 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 will only cover the copy option.

5. Select the **RELATED ACTION** icon. The system will display the actions menu.

**IMPORTANT!** The requisitioner must select on the related action icon of the requisition to copy.



Action	Requisition Name	Business Unit/Requisition ID	Requisition Date	Requester	Request State	Budget Status	Total Amount
	EAMS REQ ID	IT/0000000151	11/27/2020	MD_PO_DPT_REQUISITION_PRCR	Approved	Not Chk'd	69.70 USD
	EAMS REQ ID	IT/0000000150	11/27/2020	MD_PO_DPT_REQUISITION_PRCR	Pending	Not Chk'd	13.94 USD
	0000000149	IT/0000000149	11/24/2020	MD_PO_DPT_REQUISITION_PRCR	Canceled	Valid	0.00 USD
	0000000148	IT/0000000148	11/24/2020	MD_PO_DPT_REQUISITION_PRCR	Canceled	Valid	0.00 USD

6. Select the **COPY** option. The system will route the requisitioner to the shopping cart page.



Business Unit/Requisition ID	Requisition Date	Requester	Request State	Budget Status	Total Amount
IT/0000000151	11/27/2020	MD_PO_DPT_REQUISITION_PRCR	Approved	Not Chk'd	69.70 USD
IT/0000000150	11/27/2020	MD_PO_DPT_REQUISITION_PRCR	Pending	Not Chk'd	13.94 USD
IT/0000000149	11/24/2020	MD_PO_DPT_REQUISITION_PRCR	Canceled	Valid	0.00 USD
IT/0000000148	11/24/2020	MD_PO_DPT_REQUISITION_PRCR	Canceled	Valid	0.00 USD



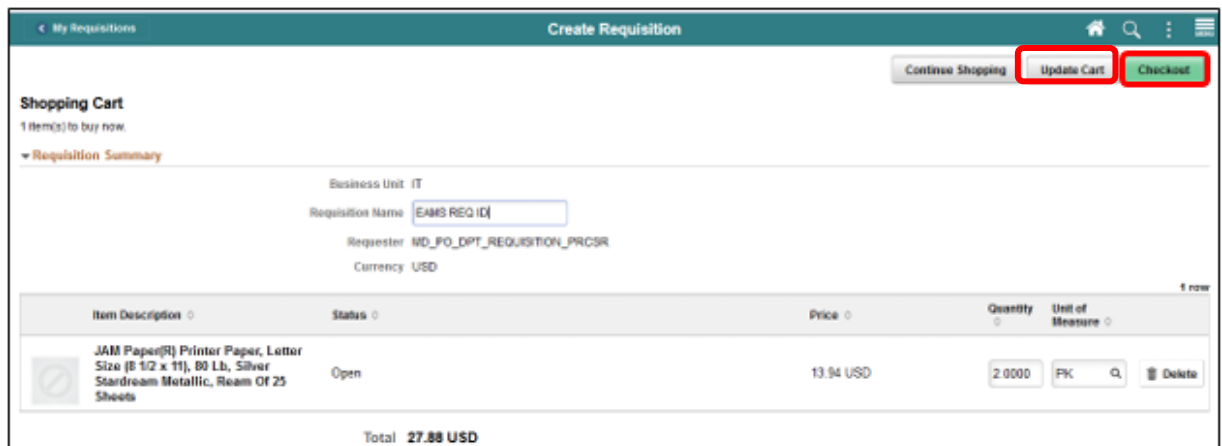
## Lesson 1: Manage a Requisition

### Lecture 1: Copy a Requisition

**IMPORTANT!** The copy functionality defaults the requisition header, line, schedule, and distribution details on a new requisition. Also, it copies any comments and attachments added to the header, line, or schedule. Note that the data has been 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.

- Update the **REQUISITION NAME** field. If the field is left blank, the system will default the Requisition ID as the name. **IMPORTANT!** Several departments will use this field (e.g., Transit) to reflect the **EAMS Requisition ID**.
- Update the **QUANTITY** field. This action will increase or decrease the number of items requested.
- 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.
- Select the **DELETE** button. The action will delete the item selected from the shopping cart.
- Select the **UPDATE CART** button. This action will save the changes and update the shopping cart.
- Select the **CHECKOUT** button. This action will route the requisitioner to the checkout page.



The screenshot shows the 'Create Requisition' page with a shopping cart summary. At the top right, there are three buttons: 'Continue Shopping', 'Update Cart' (highlighted with a red box), and 'Checkout' (highlighted with a green box). The 'Requisition Summary' section displays the following information:

- Business Unit: IT
- Requisition Name: EAMS REQ ID
- Requester: MD\_PO\_DPT\_REQUISITION\_PRCR
- Currency: USD

Below the summary is a table with one item:

Item Description	Status	Price	Quantity	Unit of Measure	
JAM Paper® Printer Paper, Letter Size (8 1/2 x 11), 80 Lb, Silver Stardream Metallic, Ream Of 25 Sheets	Open	13.94 USD	2.0000	PK	<input type="text"/> <input type="button" value="Delete"/>

At the bottom, the total is displayed as **Total 27.88 USD**.

## Lesson 1: 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 will 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 will:

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



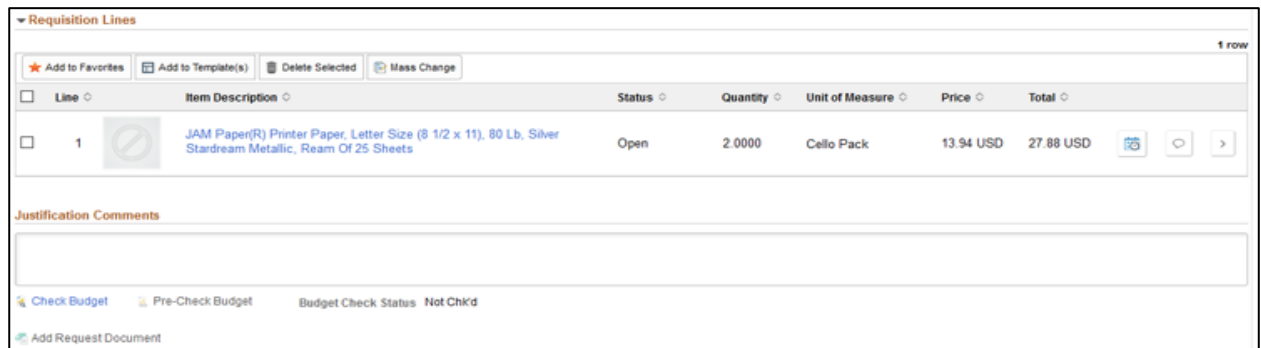
The screenshot displays the 'Create Requisition' checkout page. At the top, there's a teal header with the title 'Create Requisition' and navigation icons. Below the header, the page is titled 'Checkout'. On the right side, there are buttons for 'Continue Shopping', 'Save', and 'Submit', along with the 'Order Total 27.88 USD'. The main section is titled 'Requisition Summary' and contains several fields: 'Business Unit' set to 'IT', 'Requisition Name' set to 'EAMS REQ ID', and 'Priority' set to 'Medium'. A red rectangular box highlights the 'Header Comments/Attachments' button. At the bottom right, the 'Requester' is listed as 'MD\_PO\_DPT\_REQUISITION\_PRCR' and the 'Currency' is 'USD'.

## Lesson 1: 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 accesses the other requisition layers.

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



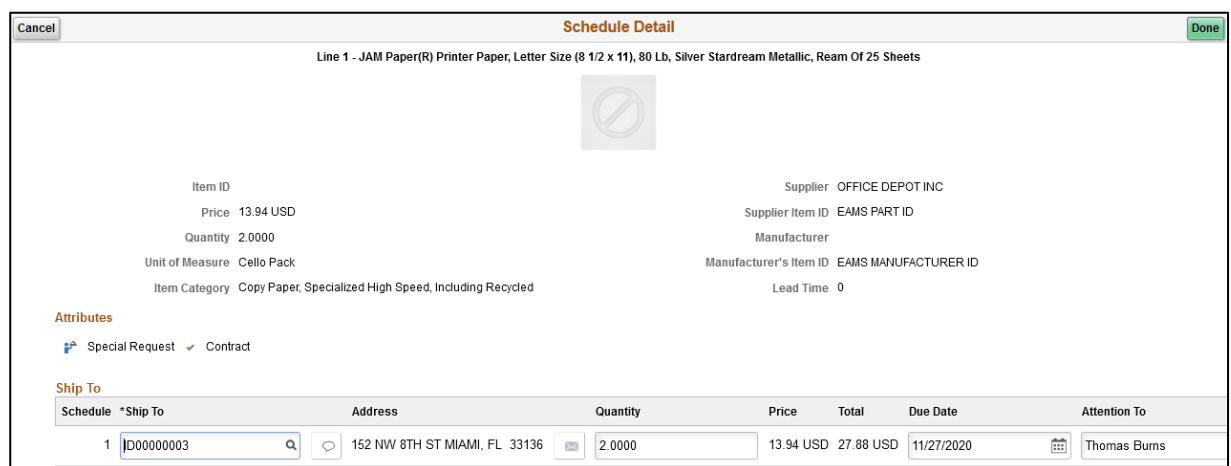
The screenshot shows the 'Requisition Lines' section. At the top, there are buttons: 'Add to Favorites', 'Add to Template(s)', 'Delete Selected', and 'Mass Change'. Below these is a table with columns: Line, Item Description, Status, Quantity, Unit of Measure, Price, and Total. The first row shows Line 1, 'JAM Paper(R) Printer Paper, Letter Size (8 1/2 x 11), 80 Lb, Silver Stardream Metallic, Ream Of 25 Sheets', with Status 'Open', Quantity '2.0000', Unit of Measure 'Cello Pack', Price '13.94 USD', and Total '27.88 USD'. Below the table is a 'Justification Comments' section with a text area. At the bottom, there are buttons: 'Check Budget', 'Pre-Check Budget', 'Budget Check Status', 'Not Chkd', and 'Add Request Document'.

**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.

19. 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, and then there will contact procurement for location table updates.

20. Select the **DUE DATE** value. This field defines what date items are expected to arrive at the ship-to location.
21. Select the **DISTRIBUTION** icon. The system will route the requisitioner to the distribution page.



The screenshot shows the 'Schedule Detail' page for 'Line 1 - JAM Paper(R) Printer Paper, Letter Size (8 1/2 x 11), 80 Lb, Silver Stardream Metallic, Ream Of 25 Sheets'. The page has a 'Cancel' button at the top left and a 'Done' button at the top right. Below the title, there is a large 'X' icon. The page is divided into two main sections: 'Item ID' and 'Supplier'. The 'Item ID' section includes fields for Item ID, Price (13.94 USD), Quantity (2.0000), Unit of Measure (Cello Pack), and Item Category (Copy Paper, Specialized High Speed, Including Recycled). The 'Supplier' section includes fields for Supplier (OFFICE DEPOT INC), Supplier Item ID (EAMS PART ID), Manufacturer, Manufacturer's Item ID (EAMS MANUFACTURER ID), and Lead Time (0). Below these sections is an 'Attributes' section with a 'Special Request' checkbox (checked) and a 'Contract' checkbox (checked). At the bottom, there is a 'Ship To' section with a table showing the ship-to details. The table has columns: Schedule, \*Ship To, Address, Quantity, Price, Total, Due Date, and Attention To. The first row shows Schedule 1, \*Ship To JD00000003, Address 152 NW 8TH ST MIAMI, FL 33136, Quantity 2.0000, Price 13.94 USD, Total 27.88 USD, Due Date 11/27/2020, and Attention To Thomas Burns.

## Lesson 1: 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. **IMPORTANT!** The accounting information entered at the beginning of the procure-to-pay process (requisition) will carry over to the purchase order and voucher. It is prudent that the correct ChartField values are added before the transaction is submitted for approval. This action will contribute to the prompt payment of a supplier.

22. The **GL BUSINESS UNIT** field will always display "MDADE" as a default value.
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.

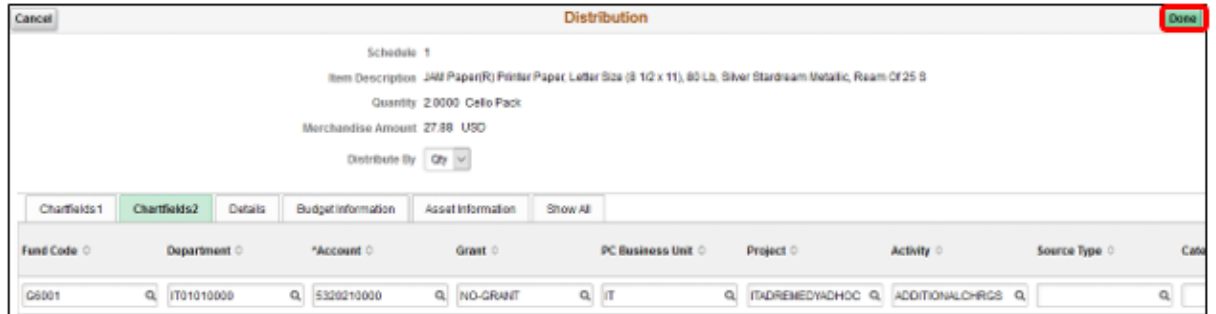
**IMPORTANT!** The following fields are required when expensing an item to an active capital or operational project that has been created in the Project Costing module. Leave the fields blank if it is not being expensed to a project.

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 1: Manage a Requisition

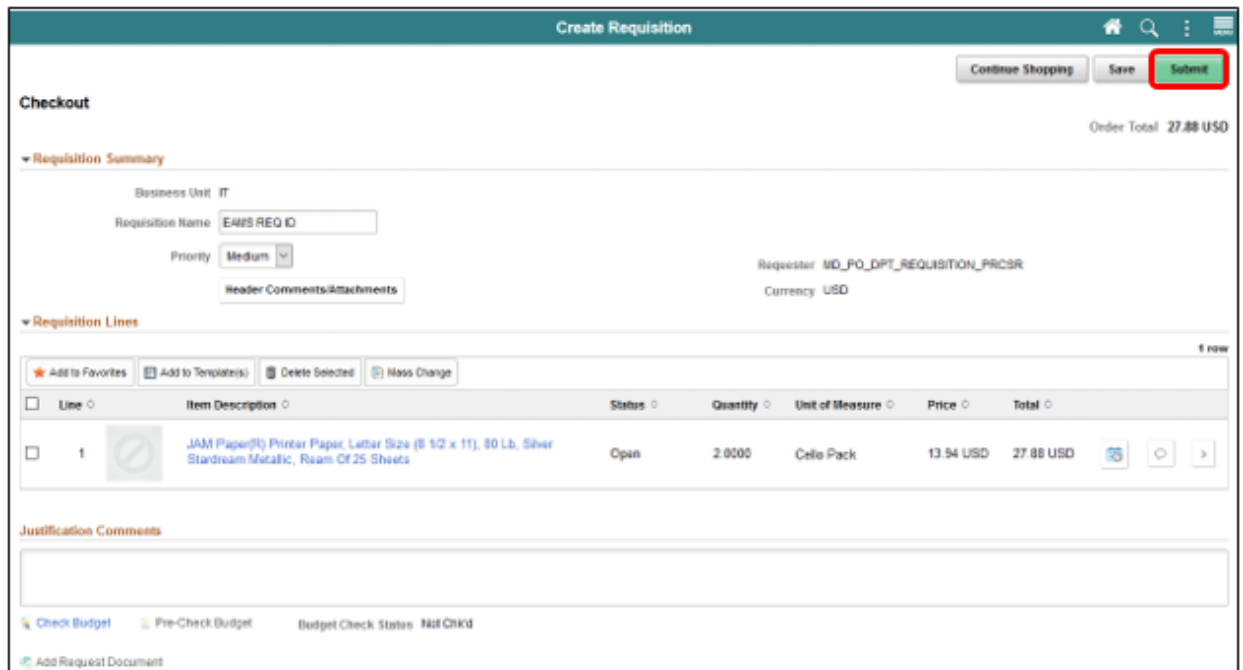
### Lecture 1: Copy a Requisition

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



**IMPORTANT!** 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.

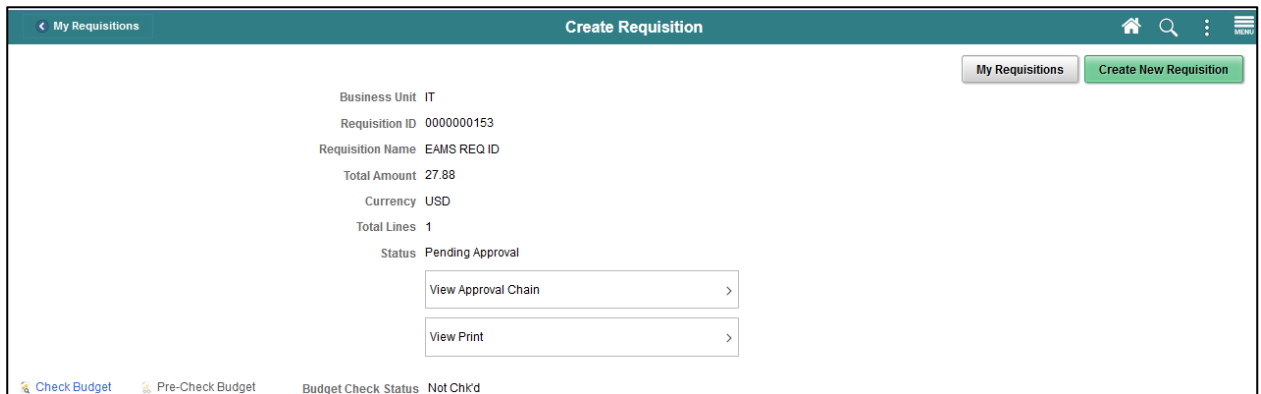
33. Select the **SUBMIT** button. The system will route to the Save Confirmation page.



## Lesson 1: 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.



The screenshot displays the 'Create Requisition' page. At the top, there is a navigation bar with 'My Requisitions' and 'Create Requisition'. Below this, there are two buttons: 'My Requisitions' and 'Create New Requisition'. The main content area shows the following details:

- Business Unit: IT
- Requisition ID: 0000000153
- Requisition Name: EAMS REQ ID
- Total Amount: 27.88
- Currency: USD
- Total Lines: 1
- Status: Pending Approval

Below the status, there are two buttons: 'View Approval Chain' and 'View Print'. At the bottom, there is a footer with 'Check Budget', 'Pre-Check Budget', and 'Budget Check Status: Not Chk'd'.

## Lesson 1: Training Activity 1

**Demonstration** The Instructor will now demonstrate how to execute the business process through the INFORMS training environment.

**Instructions** Please refer to Activity 4 on the SCM 201 Training Activity and Data Sheet.

This activity will be performed individually; users must complete it on their workstation using the INFORMS training environment. Instructors will explain how to log into INFORMS.

Users will perform the activity by following the SCM 201 Training Activity and Data Sheet and by using the training materials as reference tools.

Instructor(s) are available to answer any questions.

## Lesson 1: Training Exercise 1

### Debrief



(True/False) 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.

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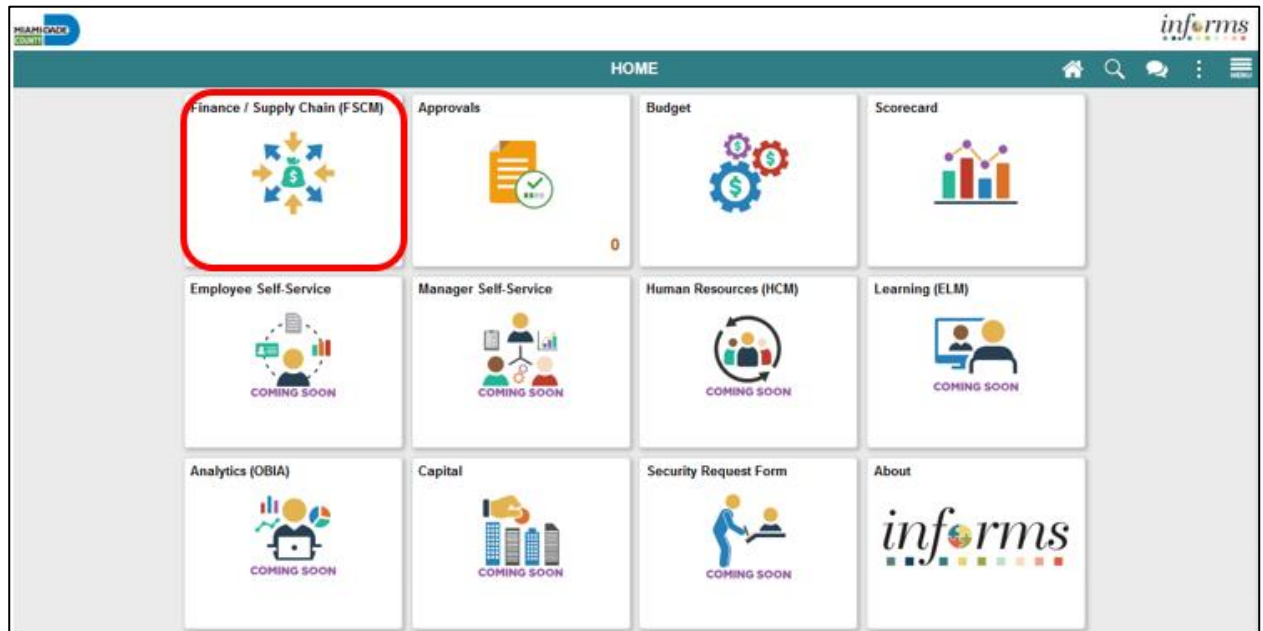


## Lesson 1: Manage a Requisition

### Lecture 2: Edit a Requisition

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

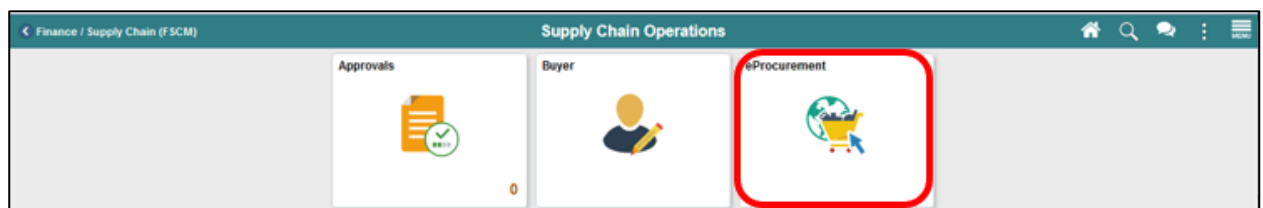
1. Login into **INFORMS** and select the **FINANCE/SUPPLY CHAIN (FSCM)** tile.



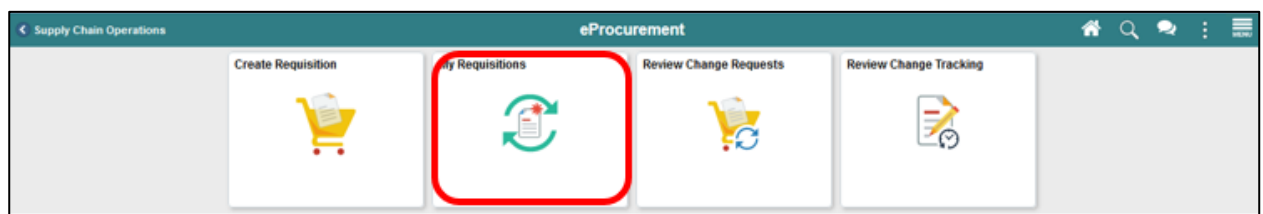
2. Select the **SUPPLY CHAIN OPERATION** tile.



3. Select the **ePROCUREMENT** tile.



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



## Lesson 1: Manage a Requisition

### Lecture 2: Edit a Requisition

#### Common Elements Used in My Requisition:

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

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

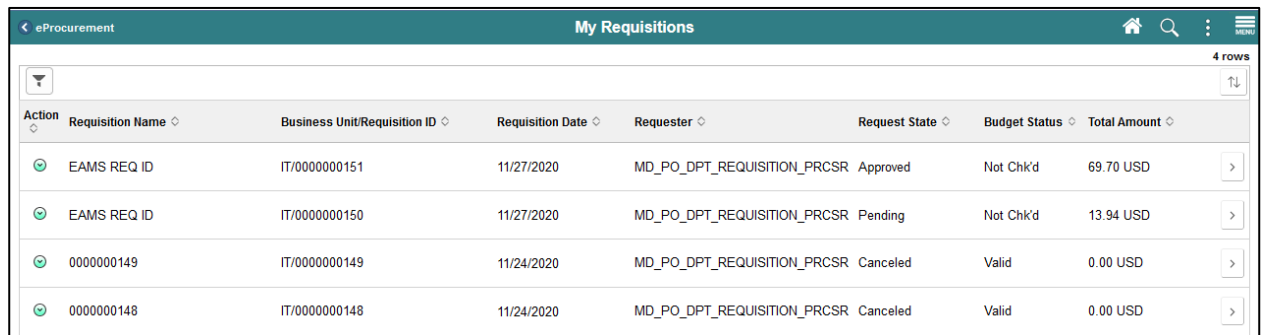
- Details
- Copy
- View Print
- Budget Check
- Edit

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 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 will only cover the edit option.

1. Select the **RELATED ACTION** icon. The system will display the actions menu.



Action	Requisition Name	Business Unit/Requisition ID	Requisition Date	Requester	Request State	Budget Status	Total Amount
	EAMS REQ ID	IT/0000000151	11/27/2020	MD_PO_DPT_REQUISITION_PRCR	Approved	Not Chk'd	69.70 USD
	EAMS REQ ID	IT/0000000150	11/27/2020	MD_PO_DPT_REQUISITION_PRCR	Pending	Not Chk'd	13.94 USD
	0000000149	IT/0000000149	11/24/2020	MD_PO_DPT_REQUISITION_PRCR	Canceled	Valid	0.00 USD
	0000000148	IT/0000000148	11/24/2020	MD_PO_DPT_REQUISITION_PRCR	Canceled	Valid	0.00 USD

2. Select the **EDIT** option. The system will route the requisitioner to the edit requisition page.



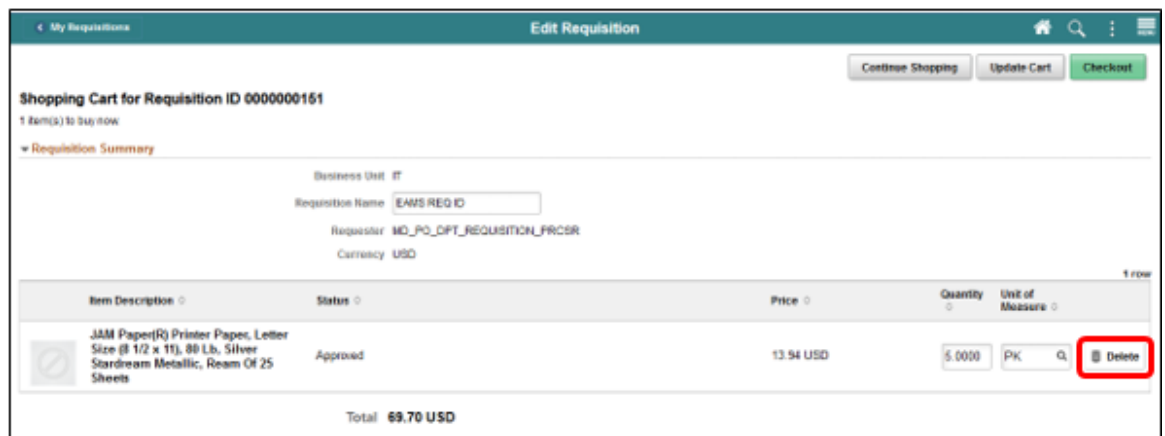
Business Unit/Requisition ID	Requisition Date	Requester	Request State	Budget Status	Total Amount
IT/0000000151	11/27/2020	MD_PO_DPT_REQUISITION_PRCR	Approved	Not Chk'd	69.70 USD
IT/0000000150	11/27/2020	MD_PO_DPT_REQUISITION_PRCR	Pending	Not Chk'd	13.94 USD
IT/0000000149	11/24/2020	MD_PO_DPT_REQUISITION_PRCR	Canceled	Valid	0.00 USD
IT/0000000148	11/24/2020	MD_PO_DPT_REQUISITION_PRCR	Canceled	Valid	0.00 USD

## Lesson 1: 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 will increase or decrease the number of items requested.
4. Select the **UNIT OF MEASURE**. **IMPORTANT!** 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. **IMPORTANT!** If the field is left blank, the system will default the requisition ID. Also, several departments will use this field (e.g., Transit) to reflect the **EAMS Requisition ID**.
6. Select the **DELETE** button. The action will delete the item in question.



Shopping Cart for Requisition ID 0000000151  
1 Item(s) to buy now

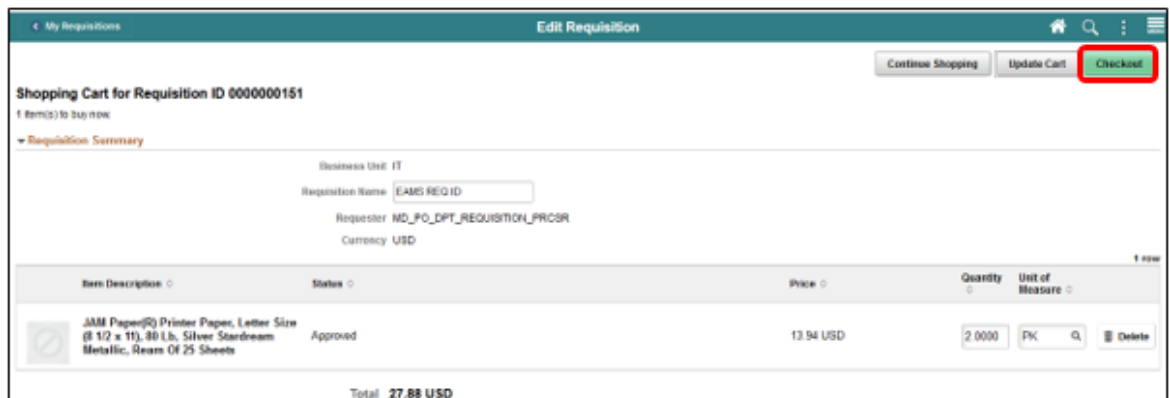
**Requisition Summary**

Business Unit: IT  
Requisition Name: EAMS REQ ID  
Requester: MD\_PO\_OPT\_REQUISITION\_PRCSR  
Currency: USD

Item Description	Status	Price	Quantity	Unit of Measure	
JAM Paper(R) Printer Paper, Letter Size (8 1/2 x 11), 80 Lb. Silver Stardream Metallic, Ream Of 25 Sheets	Approved	13.94 USD	5,000	PK	<b>Delete</b>

Total: 69.70 USD

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



Shopping Cart for Requisition ID 0000000151  
1 Item(s) to buy now

**Requisition Summary**

Business Unit: IT  
Requisition Name: EAMS REQ ID  
Requester: MD\_PO\_OPT\_REQUISITION\_PRCSR  
Currency: USD

Item Description	Status	Price	Quantity	Unit of Measure	
JAM Paper(R) Printer Paper, Letter Size (8 1/2 x 11), 80 Lb. Silver Stardream Metallic, Ream Of 25 Sheets	Approved	13.94 USD	2,000	PK	<b>Checkout</b>

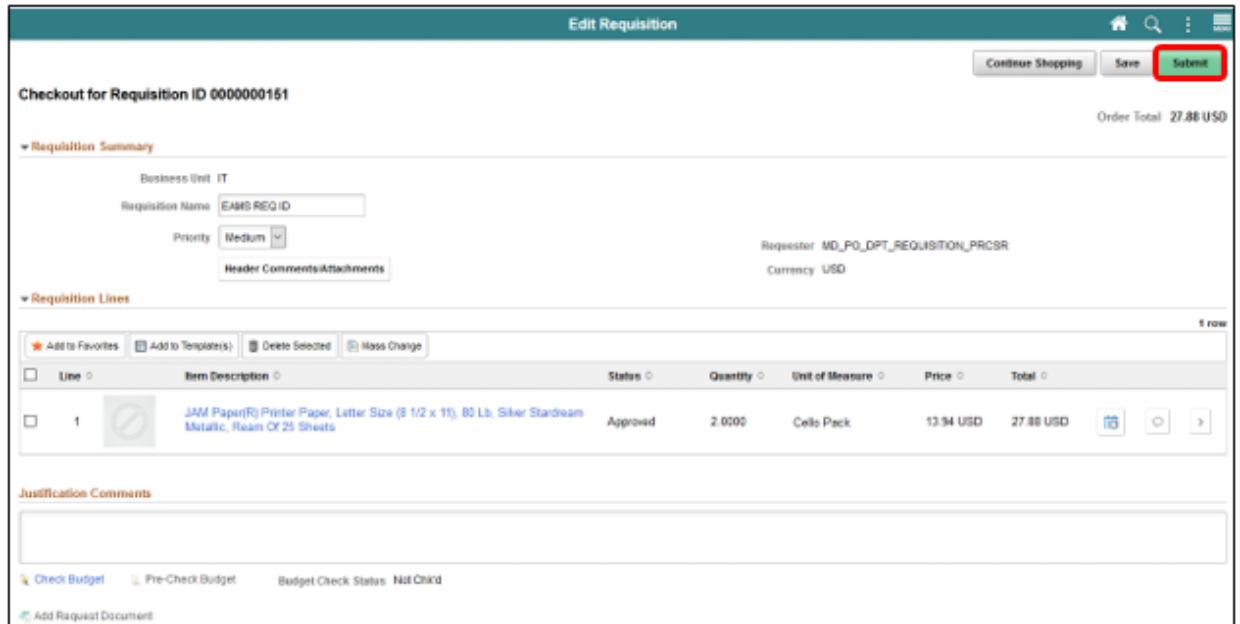
Total: 27.88 USD

## Lesson 1: Manage a Requisition

### Lecture 2: Edit a Requisition

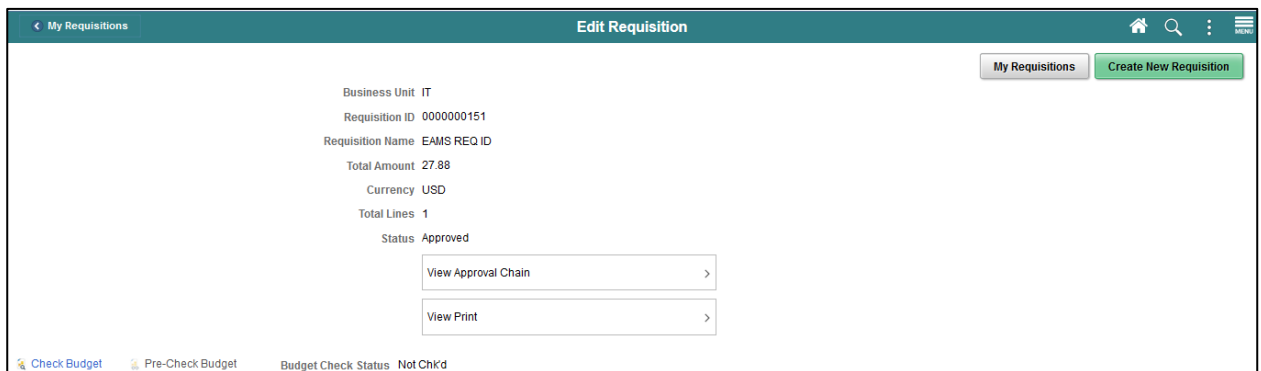
**Note:** We will assume that the requisition header, lines, schedules, and distributions have been updated for this lecture.

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



The screenshot shows the 'Edit Requisition' page for Requisition ID 0000000151. The page includes a 'Checkout for Requisition ID 0000000151' header and an 'Order Total: 27.88 USD'. The 'Requisition Summary' section displays the Business Unit (IT), Requisition Name (EAMS REQ ID), Priority (Medium), and Requester (MD\_PO\_DPT\_REQUISITION\_PRCOR). The 'Requisition Lines' section shows a table with one line item: JAM Paper(R) Printer Paper, Letter Size (8 1/2 x 11), 80 Lb, Silver Stardream Metallic, Ream Of 25 Sheets. The line item is approved, with a quantity of 2,000 and a price of 13.94 USD. The 'Justification Comments' section is empty. At the bottom, there are buttons for 'Check Budget', 'Pre-Check Budget', and 'Add Request Document'.

**Save Confirmation Page:** The save confirmation page enables the requisitioner to view a summary of the final requisition. Also, it provides access to preview the approval workflow and to print the requisition.



The screenshot shows the 'My Requisitions' page for Requisition ID 0000000151. The page includes a 'My Requisitions' button and a 'Create New Requisition' button. The requisition summary displays the Business Unit (IT), Requisition ID (0000000151), Requisition Name (EAMS REQ ID), Total Amount (27.88), Currency (USD), Total Lines (1), and Status (Approved). The 'View Approval Chain' and 'View Print' buttons are visible. At the bottom, there are buttons for 'Check Budget', 'Pre-Check Budget', and 'Budget Check Status: Not Chkd'.

## Lesson 1: Training Activity 1

**Demonstration** The Instructor will now demonstrate how to execute the business process through the INFORMS training environment.

**Instructions** Please refer to Activity 5 on the SCM 201 Training Activity and Data Sheet.

This activity will be performed individually; users must complete it on their workstation using the INFORMS training environment. Instructors will explain how to log into INFORMS.

Users will perform the activity by following the SCM 201 Training Activity and Data Sheet and by using the training materials as reference tools.

Instructor(s) are available to answer any questions.

## Lesson 1: Training Exercise 2

### Debrief

(True/False) When editing a requisition, the requisitioner cannot add more items to the requisition.



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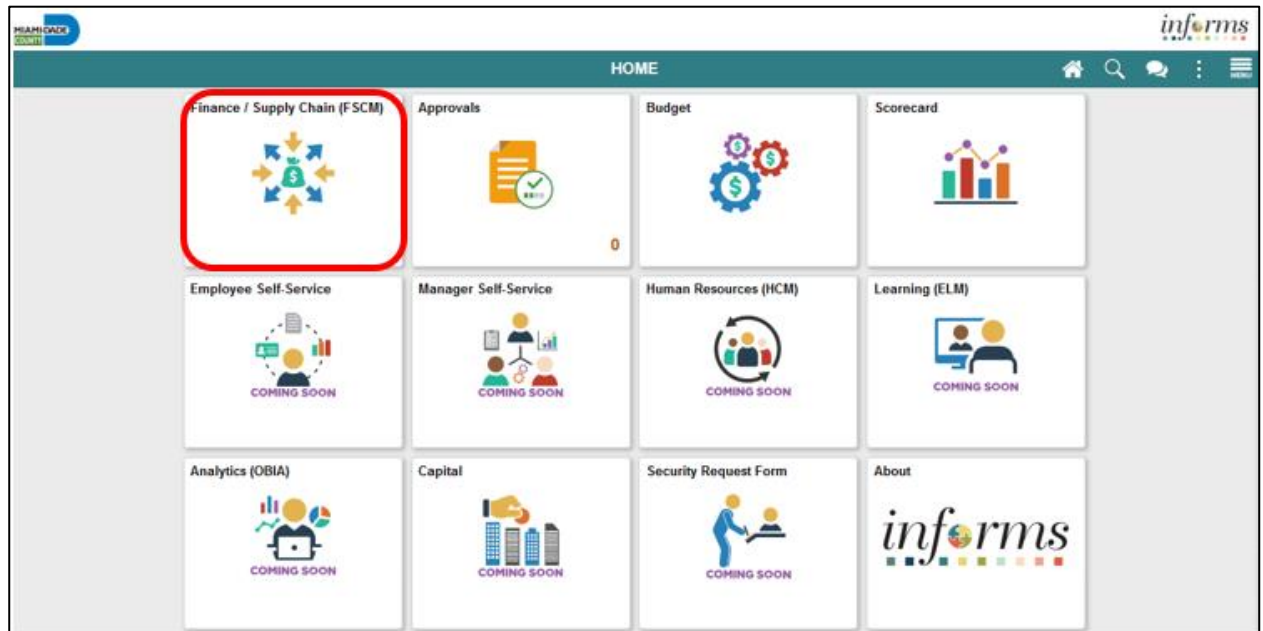
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## Lesson 1: Manage a Requisition

### Lecture 3: View and Print a Requisition

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

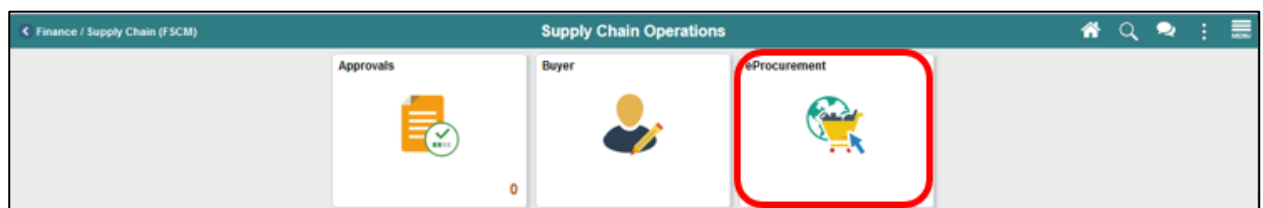
1. Login into **INFORMS** and select the **FINANCE/SUPPLY CHAIN (FSCM)** tile.



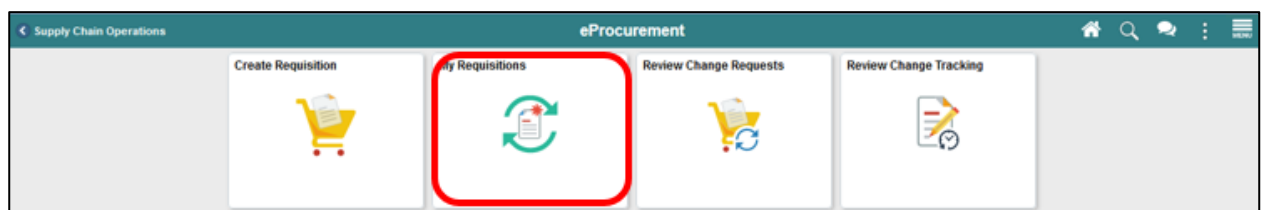
2. Select the **SUPPLY CHAIN OPERATION** tile.



3. Select the **ePROCUREMENT** tile.



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



## Lesson 1: Manage a Requisition

### Lecture 3: View and Print a Requisition

#### Common Elements Used in My Requisition:

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

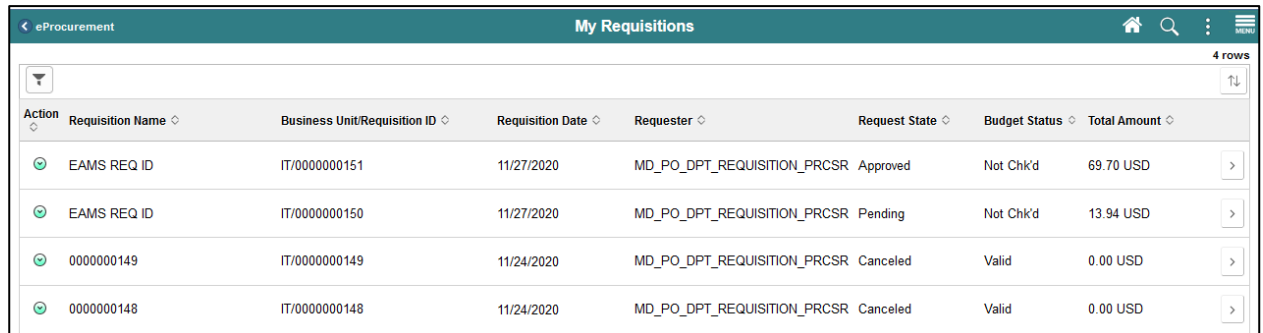
- Details
- Copy
- View Print
- Budget Check
- Edit

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 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 will only cover the view print option.

1. Select the **RELATED ACTION** icon. The system will display the actions menu. **IMPORTANT!** The requisitioner must select on the related action icon of the requisition to print.



Action	Requisition Name	Business Unit/Requisition ID	Requisition Date	Requester	Request State	Budget Status	Total Amount
	EAMS REQ ID	IT/0000000151	11/27/2020	MD_PO_DPT_REQUISITION_PRCR	Approved	Not Chk'd	69.70 USD
	EAMS REQ ID	IT/0000000150	11/27/2020	MD_PO_DPT_REQUISITION_PRCR	Pending	Not Chk'd	13.94 USD
	0000000149	IT/0000000149	11/24/2020	MD_PO_DPT_REQUISITION_PRCR	Canceled	Valid	0.00 USD
	0000000148	IT/0000000148	11/24/2020	MD_PO_DPT_REQUISITION_PRCR	Canceled	Valid	0.00 USD

2. Select the **VIEW PRINT** option. The system will display a prompt.





## Lesson 1: Manage a Requisition

### Lecture 3: View and Print a Requisition

The **Distribution Details** option displays the 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 the final approval. Note that a printed requisition may not substitute for an electronic approval in INFORMS.

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

Do you want to print the requisition with distribution details ?

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

<b>Business Unit:</b> IT		<b>Requester:</b> MD_PO_DPT_REQUISITION_PRCR		<b>Status:</b> Approved	
<b>Requisition:</b> 0000000151		<b>Requested By:</b> MD_PO_DPT_REQUISITION_PRCR		<b>Currency:</b> USD	
<b>Requisition Name:</b> EAMS REQ ID		<b>Entered Date:</b> 11/27/20		<b>Requisition Total:</b> 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	Ship To: ID00000003	Address: 152 NW 8TH ST 0101040501010 MIAMI FL 33136 United States	Shipping Quantity: 2.0000
Attention: Thomas Burns	Due Date: 11/27/20		Shipping Total: 27.88
Ship Via: COMMON	Freight Terms: DES		

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

Dept IT01010000	Oper Unit NO-GRANT	Fund G6001
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Open QTY 2.0000	PC BU IT	Project ITADREMEDYADHOC	Activity ADDITIONALCHRG	Open Amt 0.000
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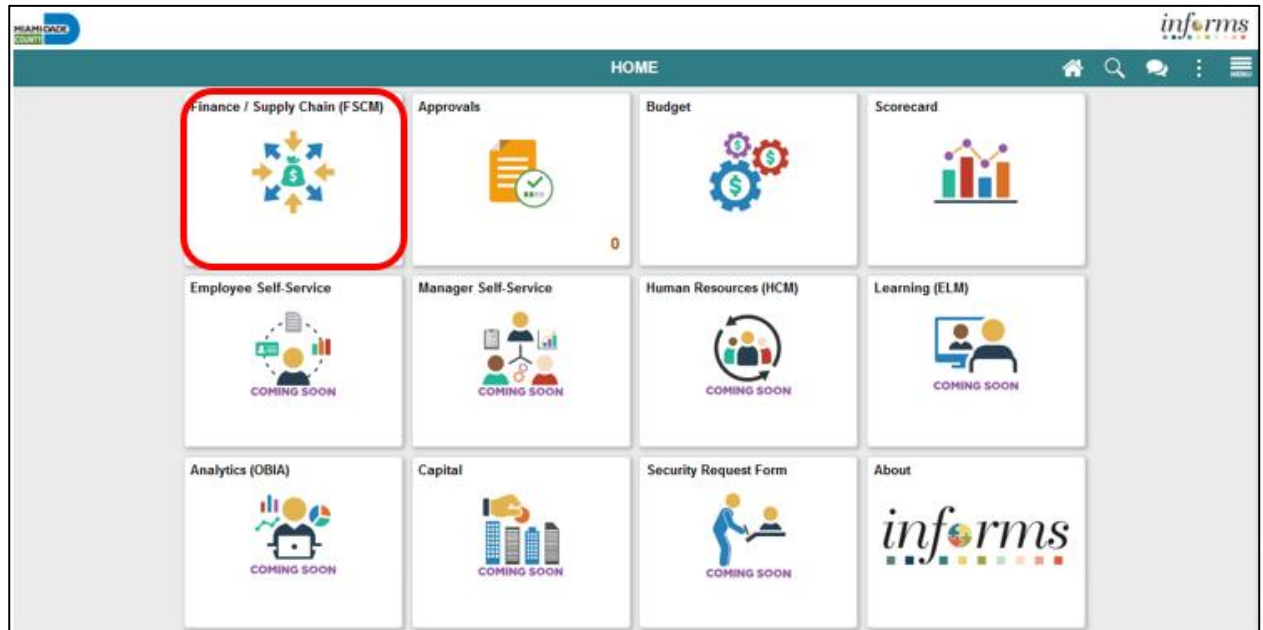
GL Base Amount 27.88	Currency USD	Sequence 0	Capitalize N
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## Lesson 1: Manage a Requisition

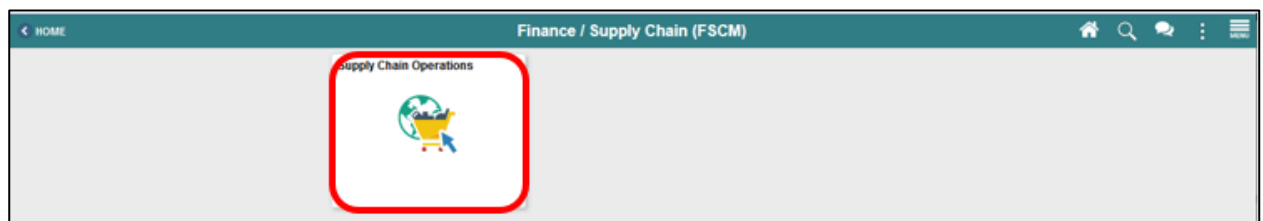
### Lecture 4: Cancel a Requisition

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

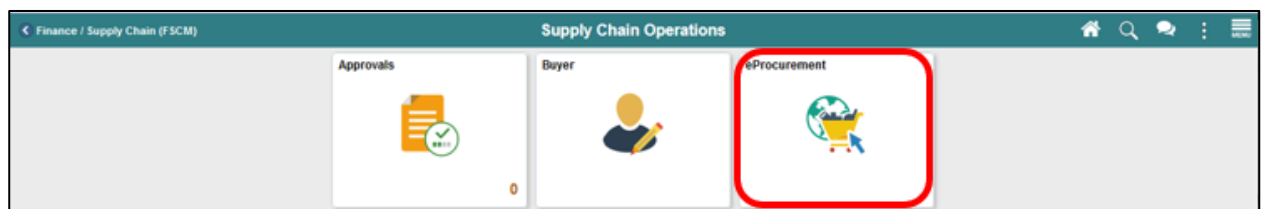
1. Login into **INFORMS** and select the **FINANCE/SUPPLY CHAIN (FSCM)** tile from the home landing page:



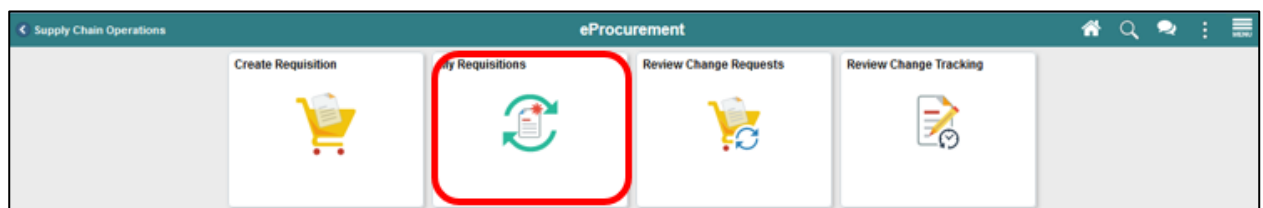
2. Select the **SUPPLY CHAIN OPERATION** tile from the Finance/Supply Chain (FSCM) page:



3. Select the **ePROCUREMENT** tile from the Supply Chain Operations page:



4. Select the **MY REQUISITION** tile from the eProcurement page:



## Lesson 1: Manage a Requisition

### Lecture 4: Cancel a Requisition

#### Common Elements Used in My Requisition:

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

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

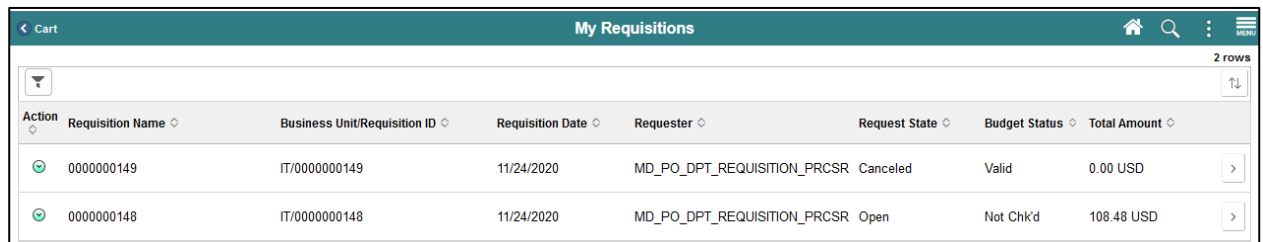
- Details
- Copy
- View Print
- Budget Check
- Edit

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 will display the requisition name, business unit, requisition ID, requester, request state, budget status, and total amount.

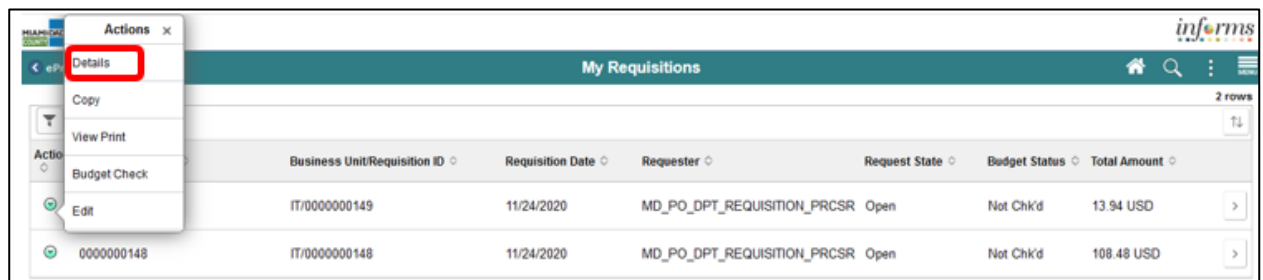
**Note:** A requisitioner may have access to all the related actions; however, this lecture will only cover the details option.

1. Select the **RELATED ACTION** icon. The system will display the actions menu.



Action	Requisition Name	Business Unit/Requisition ID	Requisition Date	Requester	Request State	Budget Status	Total Amount
	0000000149	IT/0000000149	11/24/2020	MD_PO_DPT_REQUISITION_PRCR	Canceled	Valid	0.00 USD
	0000000148	IT/0000000148	11/24/2020	MD_PO_DPT_REQUISITION_PRCR	Open	Not Chk'd	108.48 USD

2. Select the **DETAILS** option. The system will route the requisitioner to the line details page.



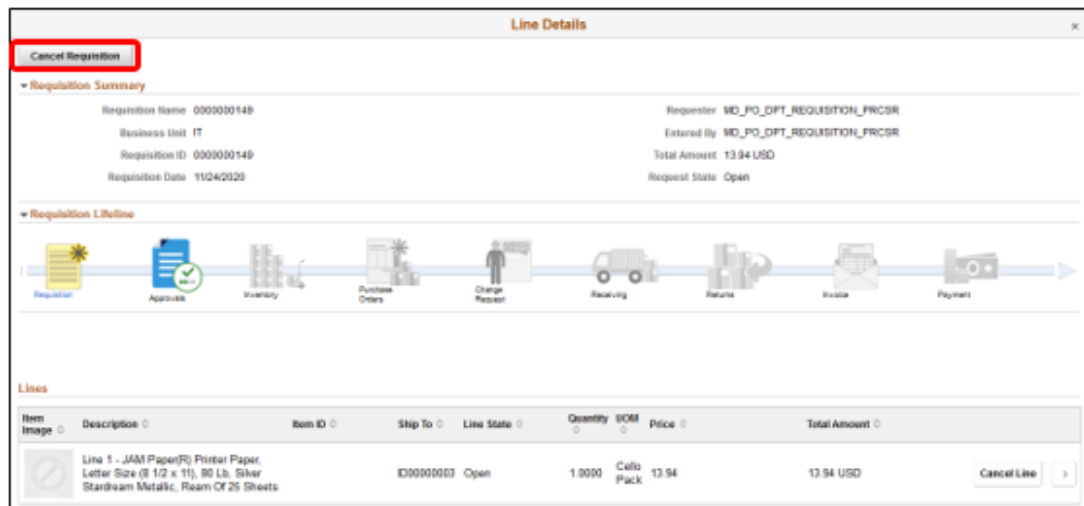
Action	Requisition Name	Business Unit/Requisition ID	Requisition Date	Requester	Request State	Budget Status	Total Amount
	0000000149	IT/0000000149	11/24/2020	MD_PO_DPT_REQUISITION_PRCR	Open	Not Chk'd	13.94 USD
	0000000148	IT/0000000148	11/24/2020	MD_PO_DPT_REQUISITION_PRCR	Open	Not Chk'd	108.48 USD

## Lesson 1: 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. **IMPORTANT!** In this lecture, we will cover the cancelation of the entire requisition.

3. Select the **CANCEL REQUISITION** button. The system will display the confirmation prompt.



**Line Details**

**Cancel Requisition**


**Requisition Summary**

Requisition Name: 000000149	Requester: MD_PO_OPT_REQUISITION_FRCSR
Business Unit: IT	Entered By: MD_PO_OPT_REQUISITION_FRCSR
Requisition ID: 000000149	Total Amount: 13.94 USD
Requisition Date: 11/24/2025	Request State: Open

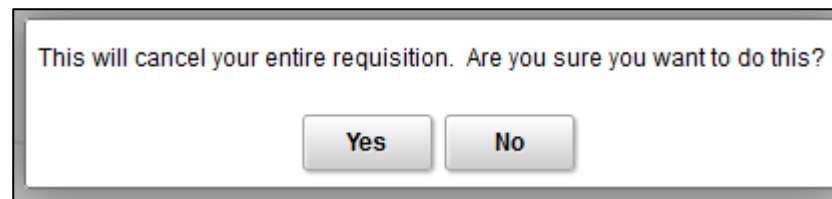
**Requisition Lifeline**

Requisition → Approval → Inventory → Purchase Orders → Change Request → Receiving → Return → Invoice → Payment

**Lines**

Item Image	Description	Item ID	Ship To	Line State	Quantity	UOM	Price	Total Amount	
	Line 1 - JAM Paper(R) Printer Paper, Letter Size (8 1/2 x 11), 80 Lb, Silver Starstream Metallic, Ream Of 25 Sheets	000000003		Open	1.0000	Cello Pack	13.94	13.94 USD	Cancel Line

4. Select the **YES** button. The system will display the confirmation message. **IMPORTANT!** A canceled requisition cannot be reopened, and it is closed permanently. The requisitioner will be required to create a new requisition and submit through the approval process.



This will cancel your entire requisition. Are you sure you want to do this?

**Yes** **No**

## Lesson 1: Manage a Requisition

### Lecture 4: Cancel a Requisition

5. Select the **OK** button. The system will route the requisitioner to the line details page.

Requisition 0000000149 Canceled.

OK

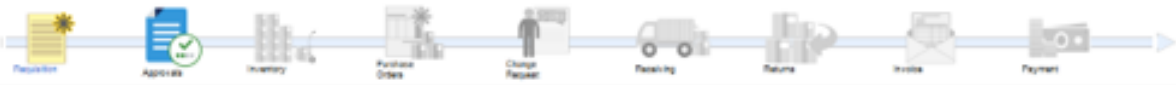
6. Confirm that the **REQUEST STATE** field reflects “**CANCELED.**”
7. Select the **CLOSED** icon. The system will route the requisitioner to my requisitions page.

**Line Details**


▼ Requisition Summary

Requisition Name: 0000000149	Requester: MD_PO_DPT_REQUISITION_PROSR
Business Unit: IE	Entered By: MD_PO_DPT_REQUISITION_PROSR
Requisition ID: 0000000149	Total Amount: 13.94 USD
Requisition Date: 11/24/2025	Request State: Canceled

▼ Requisition Lifeline



Lines

Item Image	Description	Item ID	Ship To	Line State	Quantity	UOM	Price	Total Amount
	Line 1 - JAM Paper(R) Printer Paper, Letter Size (8 1/2 x 11), 80 Lb, Silver Stardream Metallic, Ream Of 25 Sheets	ID00000003		Canceled		Cello Pack	13.94	13.94 USD

## Lesson 1: Training Activity 1

**Demonstration** The Instructor will now demonstrate how to execute the business process through the INFORMS training environment.

**Instructions** Please refer to Activity 6 on the SCM 201 Training Activity and Data Sheet.

This activity will be performed individually; users must complete it on their workstation using the INFORMS training environment. Instructors will explain how to log into INFORMS.

Users will perform the activity by following the SCM 201 Training Activity and Data Sheet and by using the training materials as reference tools.

Instructor(s) are available to answer any questions.

## Lesson 1: Training Exercise 4

### Debrief

(True/False) A canceled requisition cannot be reopened; it is closed permanently.



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## Lesson 1: Lesson Summary

### Lesson Summary



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

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



## Lesson 2: Approve a Requisition

### Lesson 2: Introduction

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

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

## Lesson 2: Approve a Requisition

### Key Terms



The following key terms are used in this Lesson:

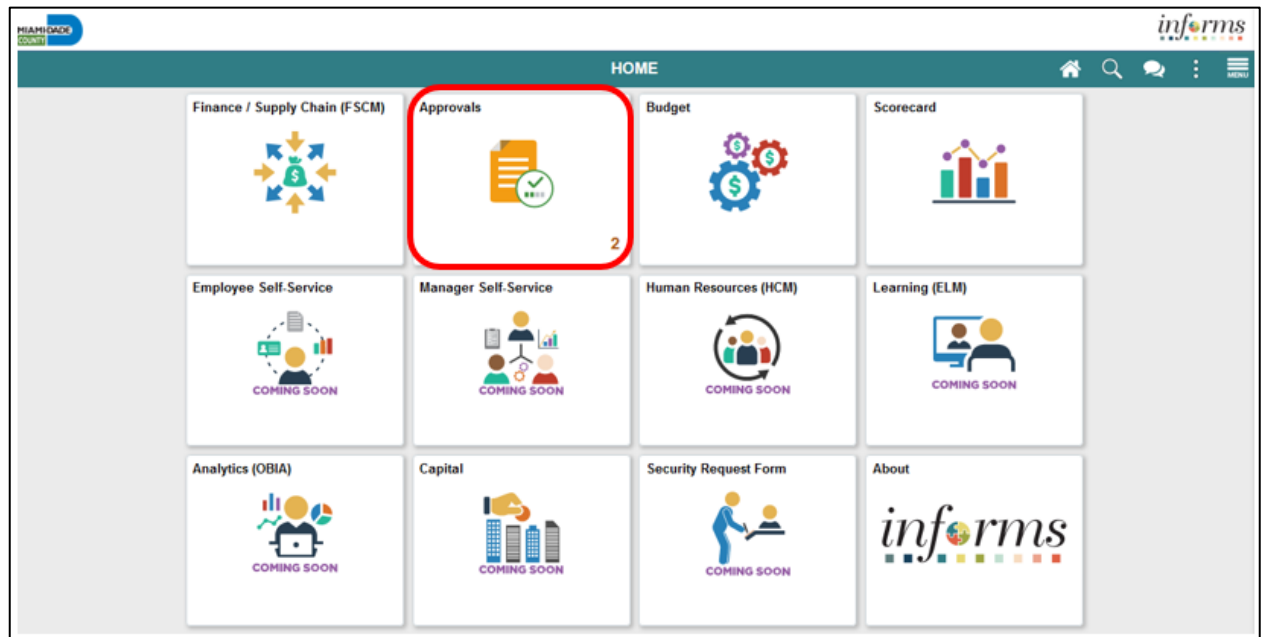
Term	Definition
<b>Pending Approval Page</b>	The Pending Approval Page displays pending requisition header information for the approver to review.
<b>Requisition Header Approval Page</b>	The Requisition Header Approval Page displays the requisition header, lines, and approver comments.
<b>Approval Line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

## Lesson 2: Approve a Requisition

### Lecture 1: Approve a Requisition

Navigate to **Approvals** tile

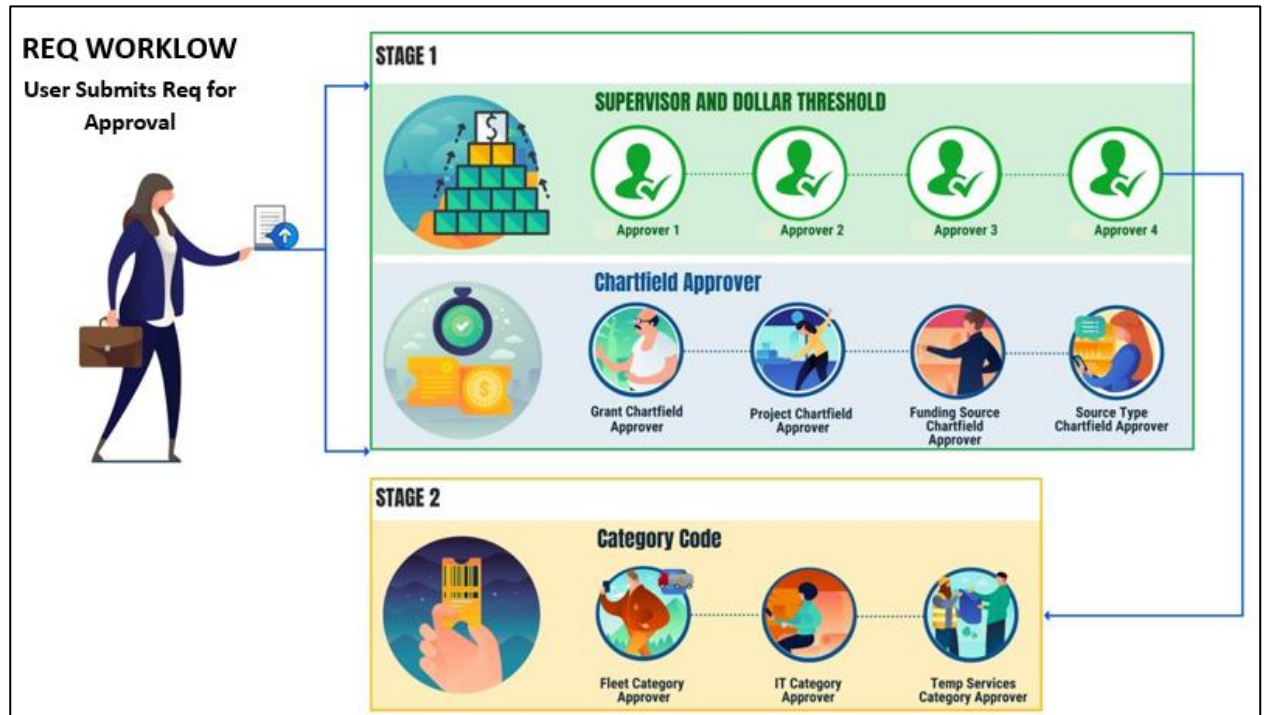
1. Login to INFORMS and select the **APPROVALS** tile.



## Lesson 2: Approve a Requisition

### Lecture 1: Approve a Requisition

**IMPORTANT!** As discussed earlier in the key change section. Miami-Dade County has adopted a standard approval workflow for requisitions. Specific security roles have been created, and departments will assign staff 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

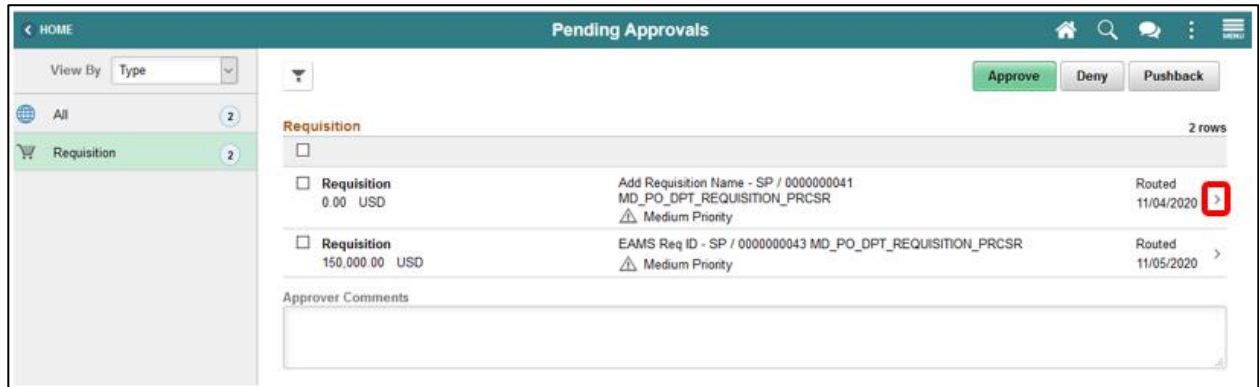
## Lesson 2: Approve a Requisition

### 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.

**IMPORTANT!** Some approvers may have access to approve other supply chain or financial transactions on this page. This lecture will only cover the approval of requisitions. Also, Miami-Dade County will 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.



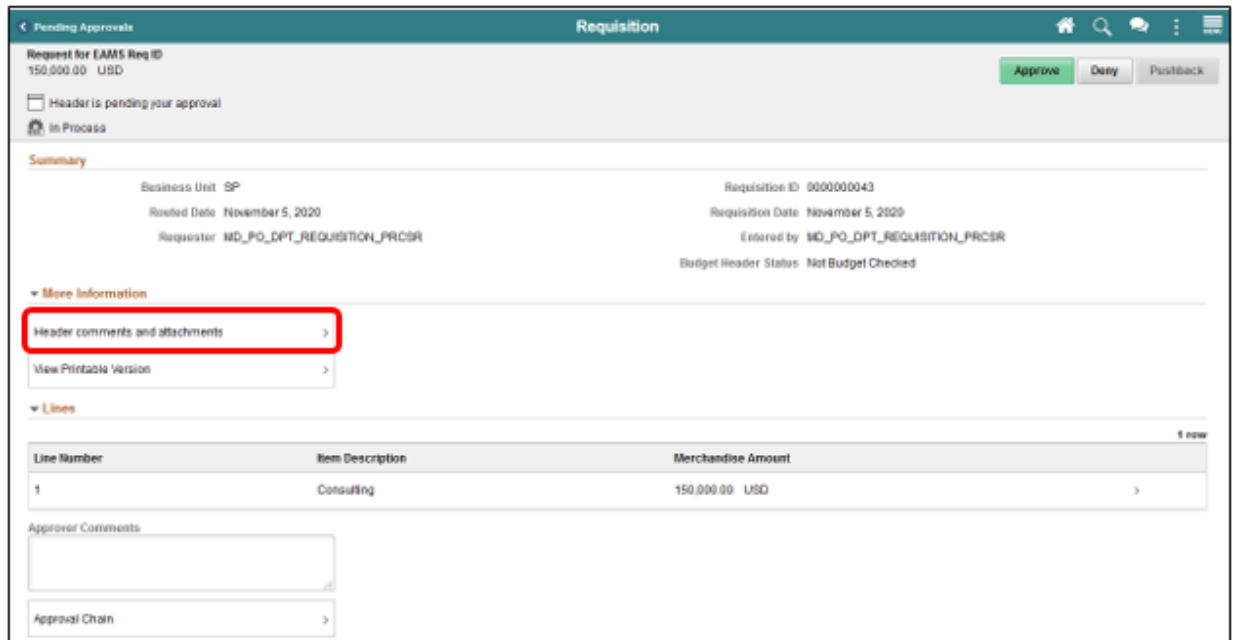
The screenshot shows the 'Pending Approvals' page. On the left, there is a sidebar with 'View By' set to 'Type'. Under 'Type', 'All' is selected with a count of 2, and 'Requisition' is also listed with a count of 2. The main area displays a table of requisitions. The first row is a summary row with a checkbox, the word 'Requisition', and a count of 2 rows. Below it, two requisition lines are listed. The first line has a checkbox, 'Requisition', '0.00 USD', and details: 'Add Requisition Name - SP / 0000000041 MD\_PO\_DPT\_REQUISITION\_PRCR' and 'Medium Priority'. The second line has a checkbox, 'Requisition', '150,000.00 USD', and details: 'EAMS Req ID - SP / 0000000043 MD\_PO\_DPT\_REQUISITION\_PRCR' and 'Medium Priority'. Both lines are marked as 'Routed' with dates '11/04/2020' and '11/05/2020' respectively. At the bottom, there is a text area for 'Approver Comments'. In the top right corner, there are buttons for 'Approve', 'Deny', and 'Pushback'. A red box highlights the 'ALL' button in the top right corner.

**Requisition Header Approval Page:** The requisition header approval page displays the requisition header, lines, and approver comments.

## Lesson 2: Approve a Requisition

### Lecture 1: Approve a Requisition

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



**Pending Approvals** **Requisition**

Request for EAMS Reg ID  
150,000.00 USD

Header is pending your approval

In Process

**Summary**

Business Unit: SP  
Routed Date: November 5, 2020  
Requester: MD\_PO\_DPT\_REQUISITION\_PRCBR

Requisition ID: 000000043  
Requisition Date: November 5, 2020  
Entered by: MD\_PO\_DPT\_REQUISITION\_PRCBR  
Budget Header Status: Not Budget Checked

**More Information**

**Header comments and attachments**

View Printable Version

**Lines**

Line Number	Item Description	Merchandise Amount
1	Consulting	150,000.00 USD

Approver Comments

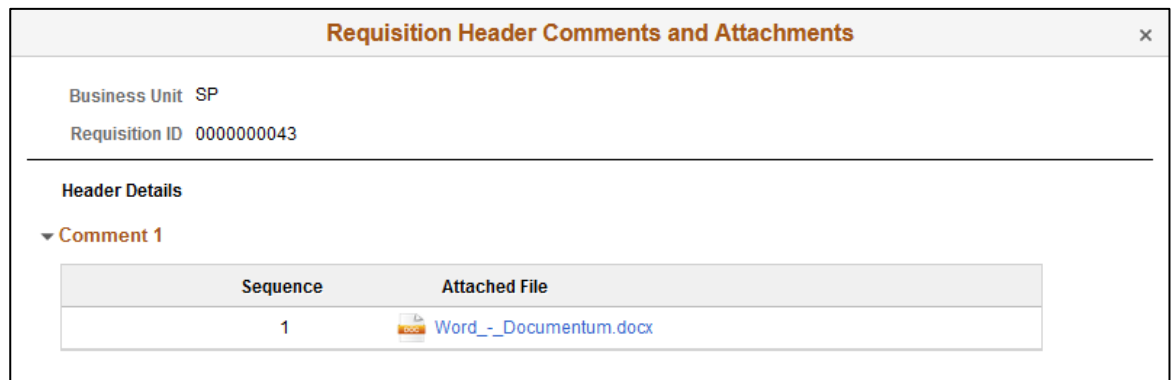
Approval Chain

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

**IMPORTANT!** The approver should validate that the market research provided meets the standards set by the departments purchasing unit. If the requisition requires a sourcing event. This information will be used to develop the event.

5. Select the **CLOSE** button.

The action will route back to the requisition header approval page.




**Requisition Header Comments and Attachments**

Business Unit: SP  
Requisition ID: 000000043

**Header Details**

**Comment 1**

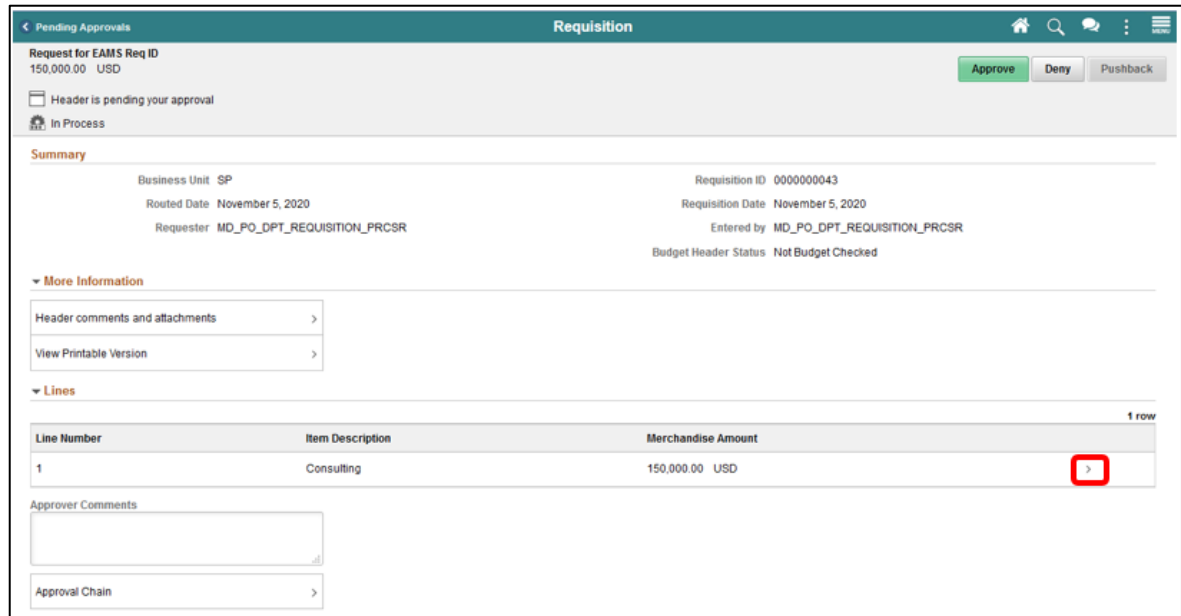
Sequence	Attached File
1	 Word_-_Documentum.docx

## Lesson 2: Approve a Requisition

### Lecture 1: Approve a Requisition

6. Select the **MORE** button.

This action will route to the approval line detail page.

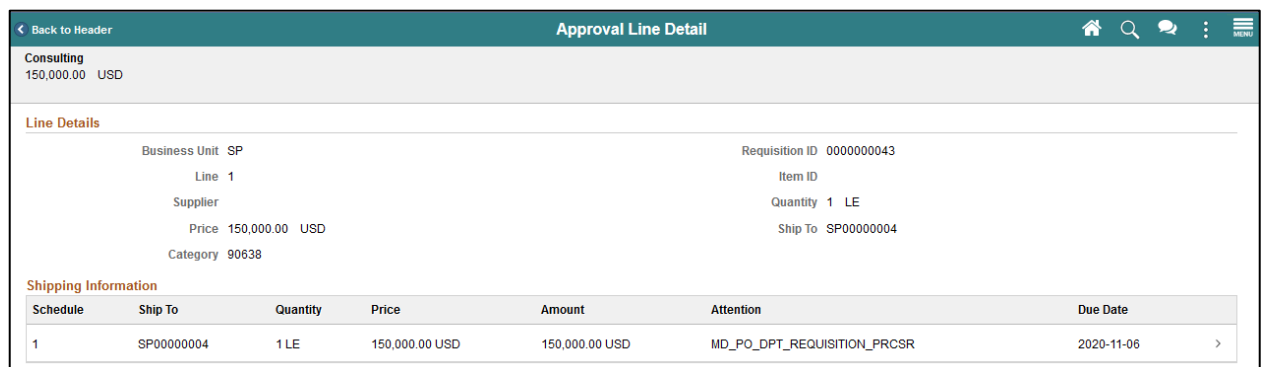


**Approval Line Detail Page:** The approval line detail page displays the requisition line and shipping information.

7. Review the **Line Detail** 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.

**IMPORTANT!** A requisition could 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** button. This action will route to the distribution page.



## Lesson 2: Approve a Requisition

### Lecture 1: Approve a Requisition

**Distribution Page:** The distribution page displays the ChartField entries selected by the requisitioner.

**IMPORTANT!** The accounting information entered at the beginning of the procure-to-pay process (requisition) will carry over to the purchase order and voucher. It is critical to the process that the correct ChartField values have been added.

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 an actual grant value if this item is expensed to an active grant. If not, the "NO-GRANT" value must be selected.

**IMPORTANT!** 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 not expenses it to a project.

14. Confirm the **PC BUSINESS UNIT** value. This field should reflect 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 should only be used when the project is GOB funded.
18. Select the **CLOSE** button. The action will route back to the approval line details page.

Distributions ×

**Fluid Approval Distribution**

Line 1

Schedule 1

Item Description Consulting

Merchandise Amount 150,000.00 USD

Quantity 1.0000 LE

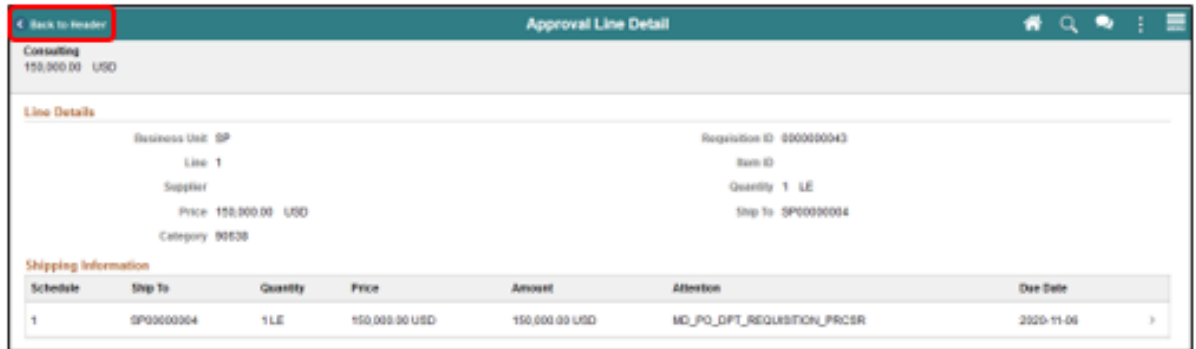
Distribution Line ◊	Requisition Quantity ◊	GL Business Unit ◊	Merchandise Amount ◊	Currency Code ◊	Fund Code ◊	Department ◊	Account ◊	Grant ◊	PC Business Unit ◊	Project ◊	Activity ◊
1	1.0000	MDADE	150000.00	USD	G5005	ID01010000	5470120000	NO-GRANT			



## Lesson 2: Approve a Requisition

### Lecture 1: Approve a Requisition

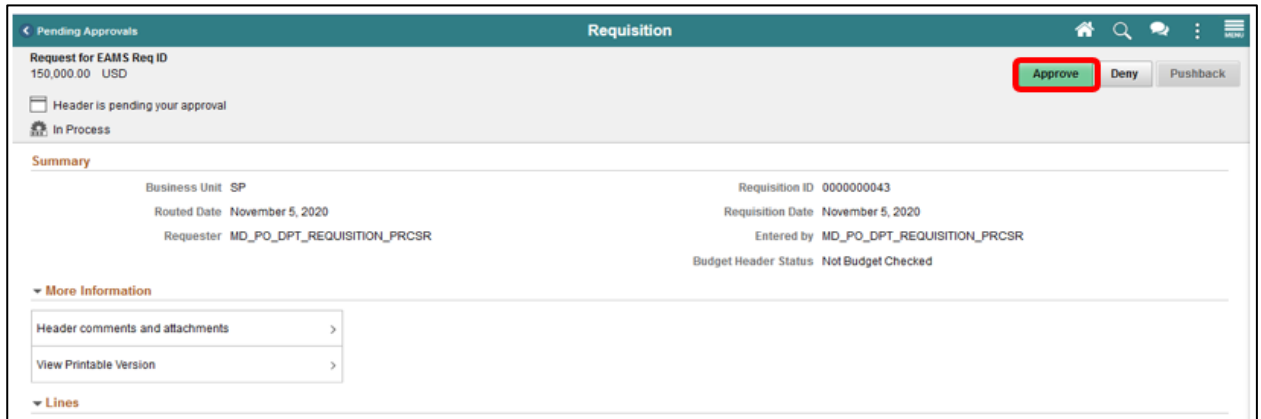
19. Select the **BACK TO HEADER** button. This action will route back to the requisition header approval page.



The screenshot shows the 'Approval Line Detail' page for a requisition. The top bar includes a 'Back to Header' button (highlighted with a red box) and the title 'Approval Line Detail'. Below the header, the requisition details are displayed, including Business Unit (SP), Line (1), Supplier, Price (150,000.00 USD), Category (99538), Requisition ID (000000043), Item ID, Quantity (1 LE), and Ship To (SP00000004). A 'Shipping Information' table is also shown with columns for Schedule, Ship To, Quantity, Price, Amount, Attention, and Due Date.

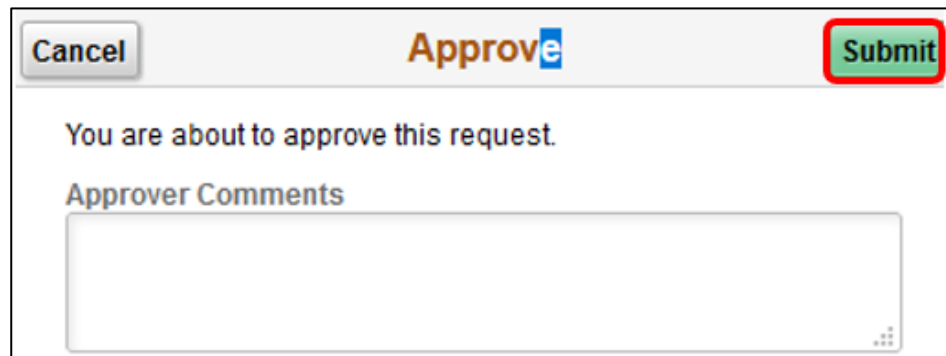
**Requisition Header Page:** Once all requisition values have been reviewed and confirmed:

20. Select the **APPROVE** button. The system will display the approver comments page.



The screenshot shows the 'Requisition' page with the title 'Requisition'. The top bar includes a 'Pending Approvals' button and the title 'Requisition'. Below the header, the requisition details are displayed, including Request for EAMS Req ID (150,000.00 USD), Business Unit (SP), Routed Date (November 5, 2020), Requisition ID (000000043), Requisition Date (November 5, 2020), Requester (MD\_PO\_DPT\_REQUISITION\_PRCR), Entered by (MD\_PO\_DPT\_REQUISITION\_PRCR), and Budget Header Status (Not Budget Checked). The 'Approve' button is highlighted with a red box. Below the details, there are links for 'Header comments and attachments' and 'View Printable Version'.

21. Enter **APPROVER COMMENTS**. These comments will be visible to the next approver and the requisitioner.
22. Select the **SUBMIT** button. This action will route the back requisition header page.

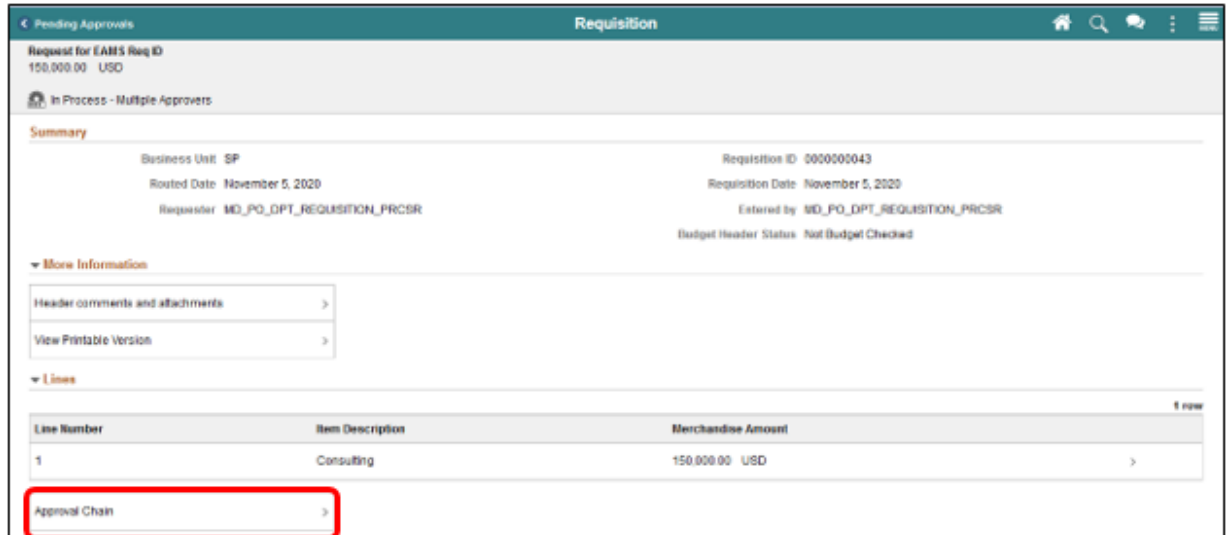


The screenshot shows the 'Approve' dialog box. The top bar includes 'Cancel', 'Approve', and 'Submit' buttons (the 'Submit' button is highlighted with a red box). The main text reads 'You are about to approve this request.' Below this, there is a section titled 'Approver Comments' with a large text input area.

## Lesson 2: Approve a Requisition

### Lecture 1: Approve a Requisition

23. Select the **APPROVAL CHAIN** button. This action will route to the approval chain page.



**Pending Approvals** Requisition

Request for EAMS Req ID  
150,000.00 USD

In Process - Multiple Approvers

**Summary**

Business Unit: SP  
Routed Date: November 5, 2020  
Requester: MD\_PO\_DPT\_REQUISITION\_PRCR

Requisition ID: 000000043  
Requisition Date: November 5, 2020  
Entered by: MD\_PO\_DPT\_REQUISITION\_PRCR  
Budget Header Status: Not Budget Checked

**More Information**

Header comments and attachments >  
View Printable Version >

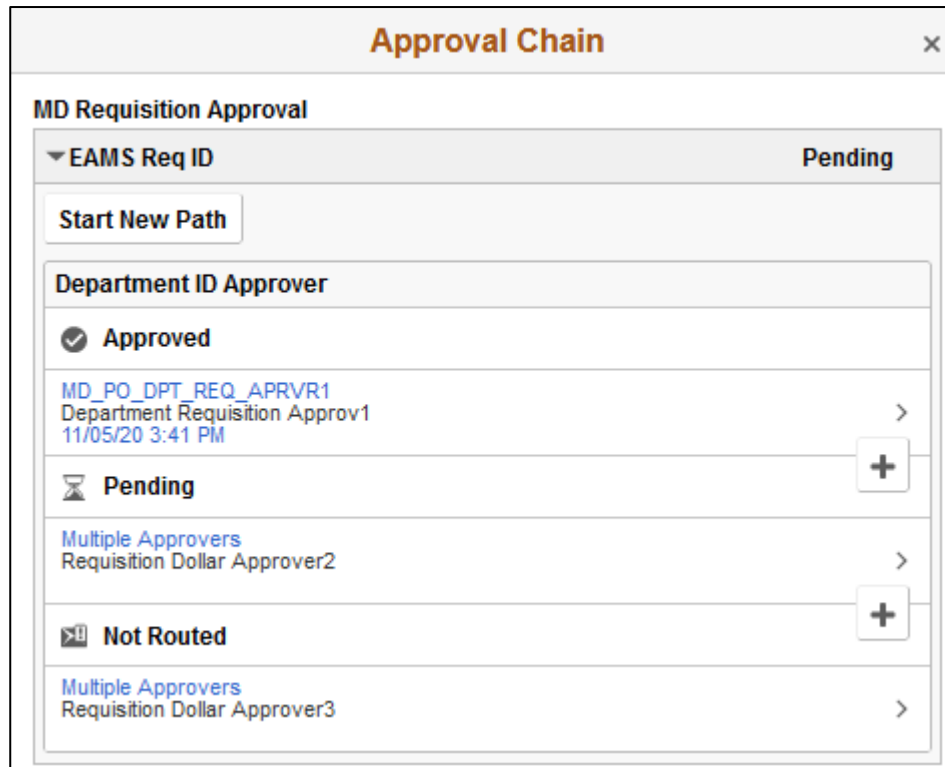
**Lines**

Line Number	Item Description	Merchandise Amount	
1	Consulting	150,000.00 USD	>

**Approval Chain** >

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

24. Select the **CLOSE** button. This action will route back requisition header page.



**Approval Chain** ✕

**MD Requisition Approval**

▼ EAMS Req ID Pending

Start New Path

**Department ID Approver**

✓ **Approved**

MD\_PO\_DPT\_REQ\_APRVR1  
Department Requisition Approv1  
11/05/20 3:41 PM >

⌚ **Pending** +

Multiple Approvers  
Requisition Dollar Approver2 >

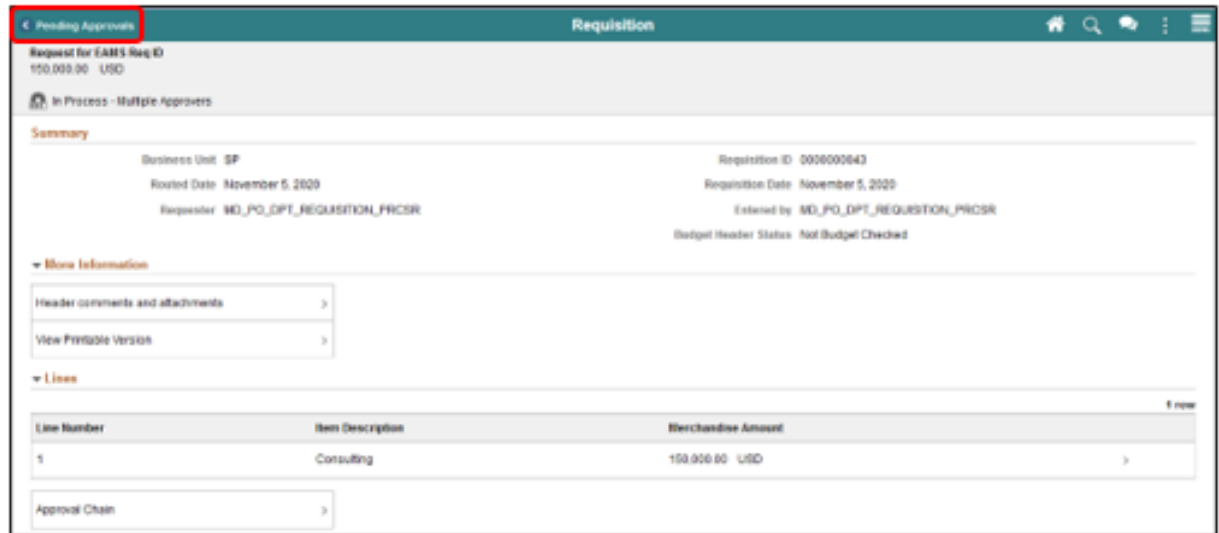
✉ **Not Routed** +

Multiple Approvers  
Requisition Dollar Approver3 >

## Lesson 2: Approve a Requisition

### Lecture 1: Approve a Requisition

25. Select the **PENDING APPROVALS** button. This action will route back to the pending approval page.



**Pending Approvals** Requisition

Request for LAMS Reg ID  
150,000.00 USD

In Process - Multiple Approvers

**Summary**

Business Unit: SP	Requisition ID: 0000000643
Routed Date: November 5, 2020	Requisition Date: November 5, 2020
Requester: MD_PO_DPT_REQUISITION_PRCR	Entered by: MD_PO_DPT_REQUISITION_PRCR
Budget Header Status: Not Budget Checked	

**More Information**

Header comments and attachments >

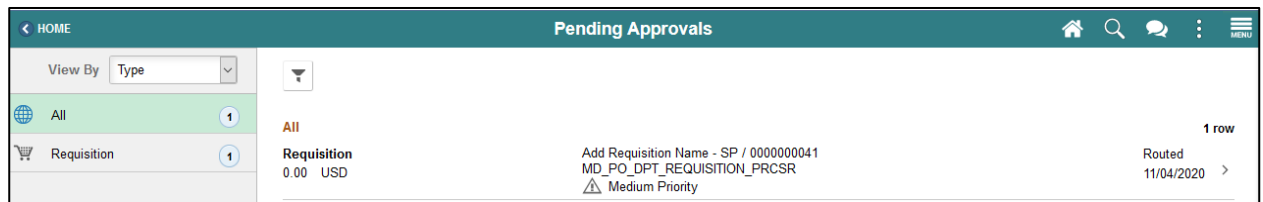
View Printable Version >

**Lines**

Line Number	Item Description	Merchandise Amount
1	Consulting	150,000.00 USD

Approval Chain >

- Repeat all the steps discussed until all pending requisitions have been approved.



HOME Pending Approvals	
View By: Type	
All 1	
Requisition 1	
<b>All</b>	
<b>Requisition</b> 0.00 USD	Add Requisition Name - SP / 0000000041 MD_PO_DPT_REQUISITION_PRCR Medium Priority
	Routed 11/04/2020 >

## Lesson 2: Training Activity 1

**Demonstration** The Instructor will now demonstrate how to execute the business process through the INFORMS training environment.

**Instructions** Please refer to Activity 7 on the SCM 201 Training Activity and Data Sheet.

This activity will be performed individually; users must complete it on their workstation using the INFORMS training environment. Instructors will explain how to log into INFORMS.

Users will perform the activity by following the SCM 201 Training Activity and Data Sheet and by using the training materials as reference tools.

Instructor(s) are available to answer any questions.

## Lesson 2: Training Exercise 1

### Debrief

*(True/False)* The approver should validate that the market research provided meets the standards set by the departments purchasing unit.



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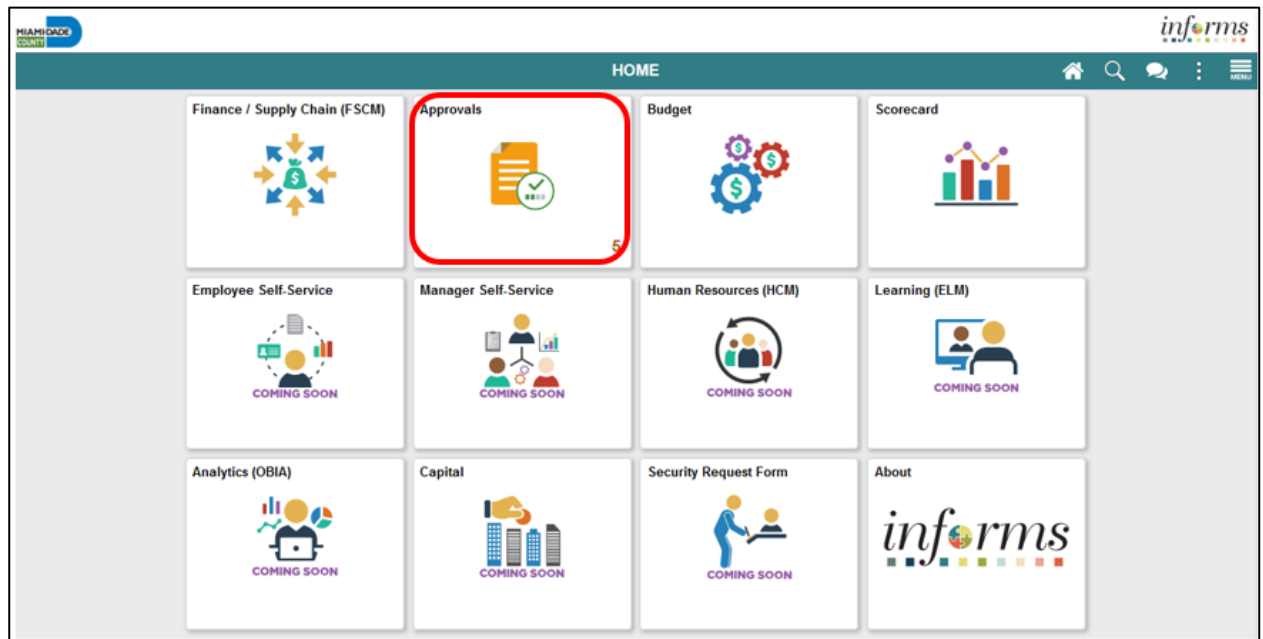
---

## Lesson 2: Approving 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.

**Note:** Some approvers may have access to deny other supply chain or financial transactions on this page. This lecture will only cover the denial of a requisition. Also, Miami-Dade County will 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.

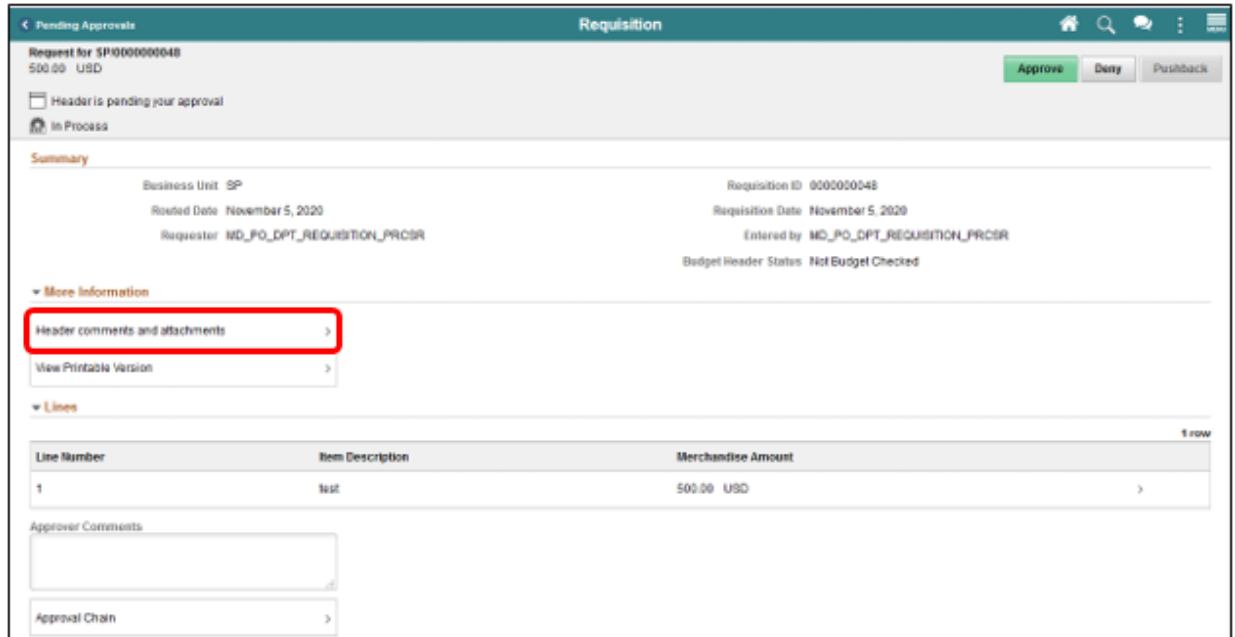
Pending Approvals				
View By: Type				
All 5				
Requisition 5				
All 5 rows				
Requisition	0.00 USD	Add Requisition Name - SP / 0000000041 MD_PO_DPT_REQUISITION_PRCR	Medium Priority	Routed 11/04/2020
Requisition	150,000.00 USD	EAMS Req ID - SP / 0000000045 MD_PO_DPT_REQUISITION_PRCR	Medium Priority	Routed 11/05/2020
Requisition	0.00 USD	EAMS Req ID - SP / 0000000046 MD_PO_DPT_REQUISITION_PRCR	Medium Priority	Routed 11/05/2020
Requisition	0.00 USD	EAMS REQ ID - SP / 0000000047 MD_PO_DPT_REQUISITION_PRCR	Medium Priority	Routed 11/05/2020
Requisition	400.00 USD	SP / 0000000048 MD_PO_DPT_REQUISITION_PRCR	Medium Priority	Routed 11/05/2020

## Lesson 2: Approving a Requisition

### Lecture 2: Deny a Requisition

**Requisition Header Approval Page:** The requisition header approval page displays the requisition header, lines, and approver comments. **IMPORTANT!** Approvers should review all four layers of a requisition and comments/attachments before the final denial.

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



**Requisition**

Request for SP0000000048  
500.00 USD

Header is pending your approval  
In Process

**Summary**

Business Unit: SP  
Routed Date: November 5, 2020  
Requester: MD\_PO\_DPT\_REQUISITION\_PRCBR

Requisition ID: 000000048  
Requisition Date: November 5, 2020  
Entered by: MD\_PO\_DPT\_REQUISITION\_PRCBR  
Budget Header Status: Not Budget Checked

**More Information**

Header comments and attachments >

View Printable Version >

**Lines**

Line Number	Item Description	Merchandise Amount
1	test	500.00 USD

Approver Comments:

Approval Chain >

## Lesson 2: Approving a Requisition

### Lecture 2: Deny a Requisition

3. Review the comment text submitted by the requisitioner.
4. Select the **ATTACHED FILE** icon for each document that has been attached. **IMPORTANT!** The approver should validate that the market research meets the standards set by the departments purchasing unit. If the requisition requires a sourcing event, the attached market research will help the Buyer in developing the sourcing event details.
5. Select the **CLOSE** button. The action will route back to the requisition header approval page.

**Requisition Header Comments and Attachments** ✕

Business Unit SP


Requisition ID 0000000048

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**Header Details**

▼ **Comment 1**

Required for operations.

Sequence	Attached File
1	 Word_-_Documentum.docx


6. Select the **MORE** button. This action will route to the approval line detail page.

Pending Approvals
Requisition

Request for SP/0000000048  
500.00 USD

Approve
Deny
Pushback

☐ Header is pending your approval

 In Process

---

**Summary**

Business Unit SP	Requisition ID 0000000048
Routed Date November 5, 2020	Requisition Date November 5, 2020
Requester MD_PO_DPT_REQUISITION_PRCR	Entered by MD_PO_DPT_REQUISITION_PRCR
Budget Header Status Not Budget Checked	

▼ **More Information**

Header comments and attachments >

View Printable Version >

▼ **Lines**

Line Number	Item Description	Merchandise Amount
1	test	500.00 USD

1 row

Approver Comments

Approval Chain >

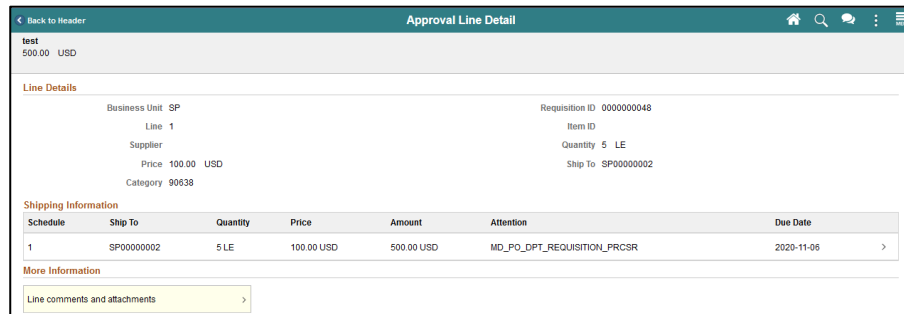


## Lesson 2: Approving a Requisition

### Lecture 2: Deny a Requisition

**Approval Line Detail Page:** The approval line detail page displays the requisition line and shipping information.

- Review the **Line Details** section and confirm that the correct **QUANTITY** and **PRICE** are listed.
- Review the **Shipping Information** section and confirm that the **SHIP TO, ATTENTION,** and **DUE DATE** fields are correct. **IMPORTANT!** A requisition could 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).
- Select the **MORE** button. This action will route to the distribution page.



**Line Details**

Business Unit	SP	Requisition ID	0000000048
Line	1	Item ID	
Supplier		Quantity	5 LE
Price	100.00 USD	Ship To	SP00000002
Category	90638		

**Shipping Information**

Schedule	Ship To	Quantity	Price	Amount	Attention	Due Date
1	SP00000002	5 LE	100.00 USD	500.00 USD	MD_PO_DPT_REQUISITION_FRCR	2020-11-06

**More Information**

Line comments and attachments >

**Distribution Page:** The distribution page displays the ChartField entries selected by the requisitioner. **IMPORTANT!** The accounting information entered at the beginning of the procure-to-pay process (requisition) will carry over to the purchase order and voucher. It is critical to the process that the correct ChartField values have been selected.

- Confirm the **FUND CODE** value.
- Confirm the **DEPARTMENT** value.
- Confirm the **ACCOUNT** value.
- Confirm 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.

**IMPORTANT!** 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 business unit of the requestor.

## Lesson 2: Approving a Requisition

### Lecture 2: Deny a Requisition

12. 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).
13. Confirm the **SOURCE TYPE** value. The source type field should only be selected when the project is GOB funded.
14. Select the **CLOSE** button. This action will route the approver back to the approval line details page.

Distributions											
<b>Fluid Approval Distribution</b>											
Line 1											
Schedule 1											
Item Description test											
Merchandise Amount 500.00 USD											
Quantity 5.0000 LE											
Distribution Line	Requisition Quantity	GL Business Unit	Merchandise Amount	Currency Code	Fund Code	Department	Account	Grant	PC Business Unit	Project	Activity
1	5.0000	MDADE	500.00	USD	ES001	SP01010000	5320210000	NO-GRANT			

15. Select the **BACK TO HEADER** button. This action will route the approver back to the requisition header approval page.

Back to Header

Approval Line Detail

Search

Chat

More

Item

500.00 USD

Line Details

Business Unit

SP

Line

1

Supplier

Price

100.00 USD

Category

99638

Requisition ID

0000000048

Item ID

Quantity

5 LE

Ship To

SP00000002

Shipping Information

Schedule	Ship To	Quantity	Price	Amount	Attention	Due Date
1	SP00000002	5 LE	100.00 USD	500.00 USD	MO_PO_OFT_REQUISITION_PRICER	2020-11-06

More Information

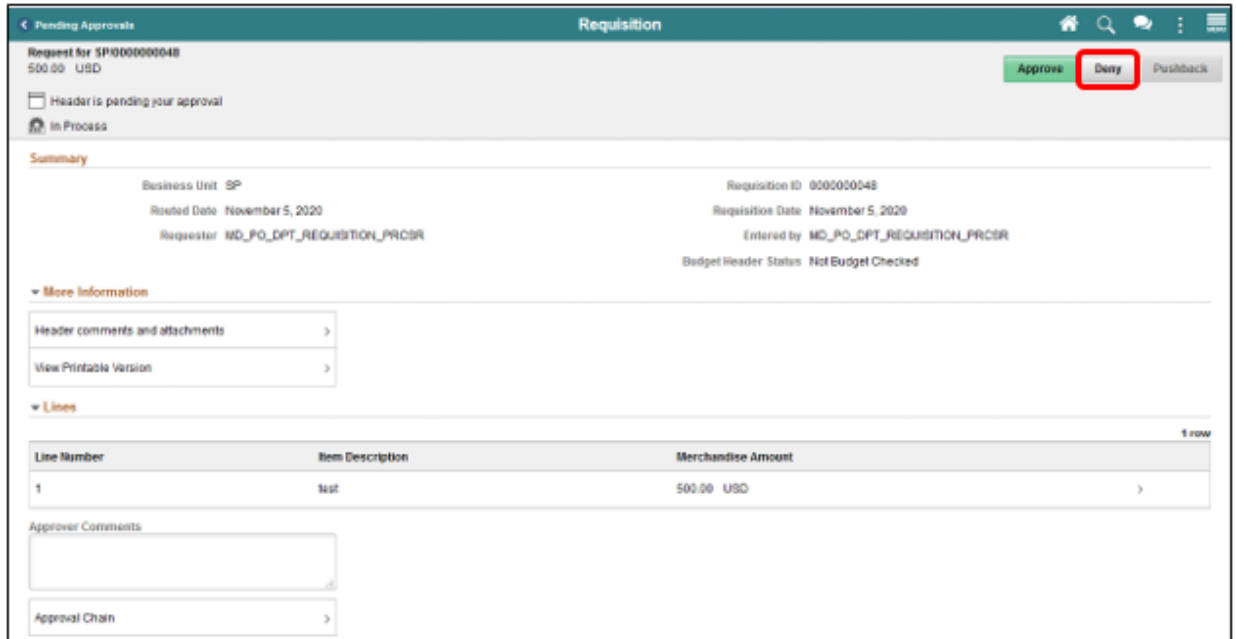
Line comments and attachments

## Lesson 2: Approving a Requisition

### Lecture 2: Deny a Requisition

**Note:** 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.

16. Select the **DENY** button. The system will display the approver comments page.



**Requisition**

Request for SP0000000048  
500.00 USD

☐ Header is pending your approval  
In Process

**Summary**

Business Unit: SP  
Routed Date: November 5, 2020  
Requester: MD\_PO\_DPT\_REQUISITION\_PRCBR

Requisition ID: 0000000048  
Requisition Date: November 5, 2020  
Entered by: MD\_PO\_DPT\_REQUISITION\_PRCBR  
Budget Header Status: Not Budget Checked

**More Information**

Header comments and attachments >  
View Printable Version >

**Lines**

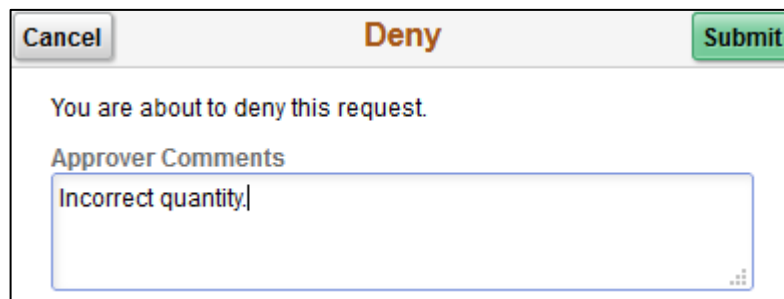
Line Number	Item Description	Merchandise Amount
1	test	500.00 USD

Approver Comments

Approval Chain >

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

17. Enter approver comments.
18. Select the **SUBMIT** button. This action will return the approver to the requisition header page.



**Deny**

You are about to deny this request.

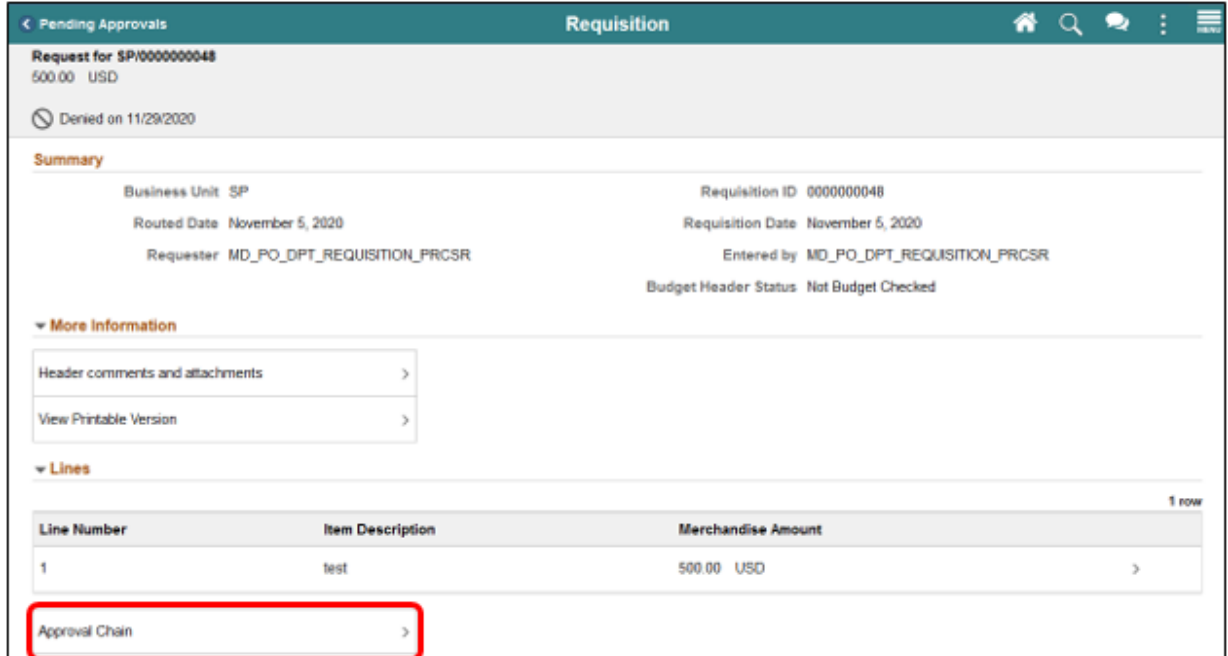
**Approver Comments**

Incorrect quantity.

## Lesson 2: Approving a Requisition

### Lecture 2: Deny a Requisition

19. Select the **APPROVAL CHAIN** button. This action will display the approval chain page.



**Pending Approvals** **Requisition**

Request for SP/0000000048  
500.00 USD

⛔ Denied on 11/29/2020

**Summary**

Business Unit: SP Requisition ID: 0000000048  
Routed Date: November 5, 2020 Requisition Date: November 5, 2020  
Requester: MD\_PO\_DPT\_REQUISITION\_PRCR Entered by: MD\_PO\_DPT\_REQUISITION\_PRCR  
Budget Header Status: Not Budget Checked

**More Information**

Header comments and attachments >  
View Printable Version >

**Lines**

Line Number	Item Description	Merchandise Amount
1	test	500.00 USD

1 row

Approval Chain >

**Note:** On this page, the approver can confirm that the requisition approval status reflects Denied.



**Approval Chain**

**MD Requisition Approval**

Requisition 0000000048 **Denied**

**Department ID Approver**

⛔ Denied

MD\_PO\_DPT\_REQ\_APRVR1  
Department Requisition Approv1  
11/05/20 4:30 PM >

**Comments**

MD\_PO\_DPT\_REQ\_APRVR1 at 11/05/20 - 4:30 PM  
Incorrect quantity.

## Lesson 2: Training Exercise 2

### Debrief

(True/False) When a requisition is denied, the approval workflow stops regardless of the approval level and sets the transaction back to the requisitioner.



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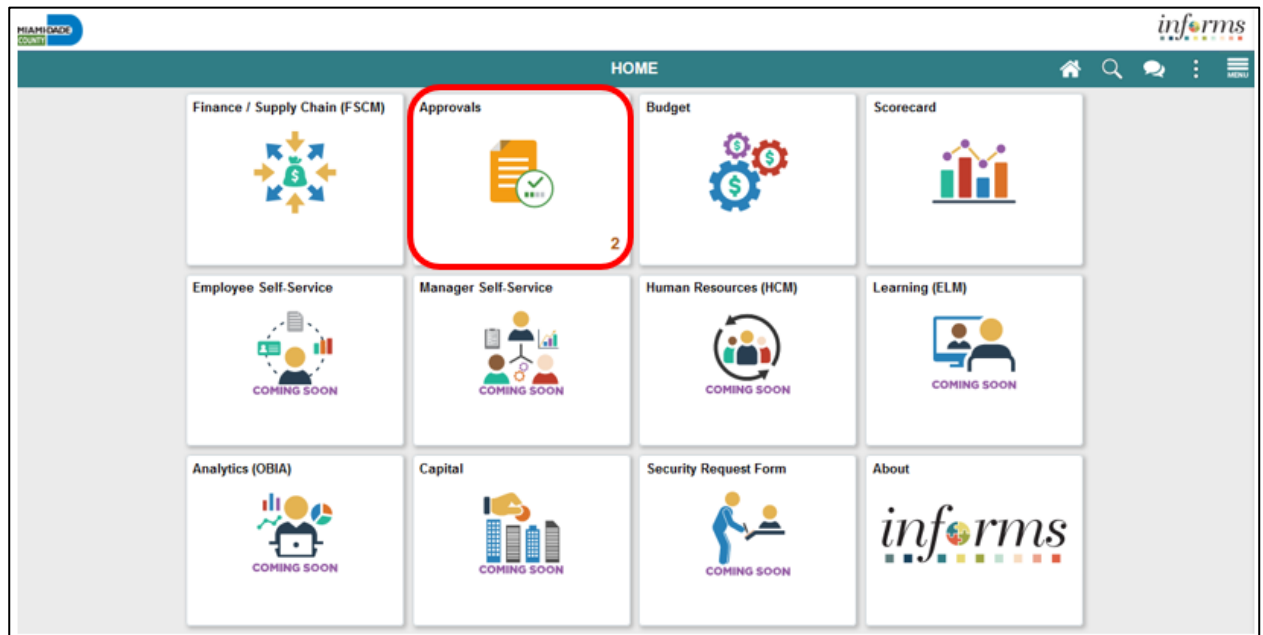
---

## Lesson 2: Approving 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.

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

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

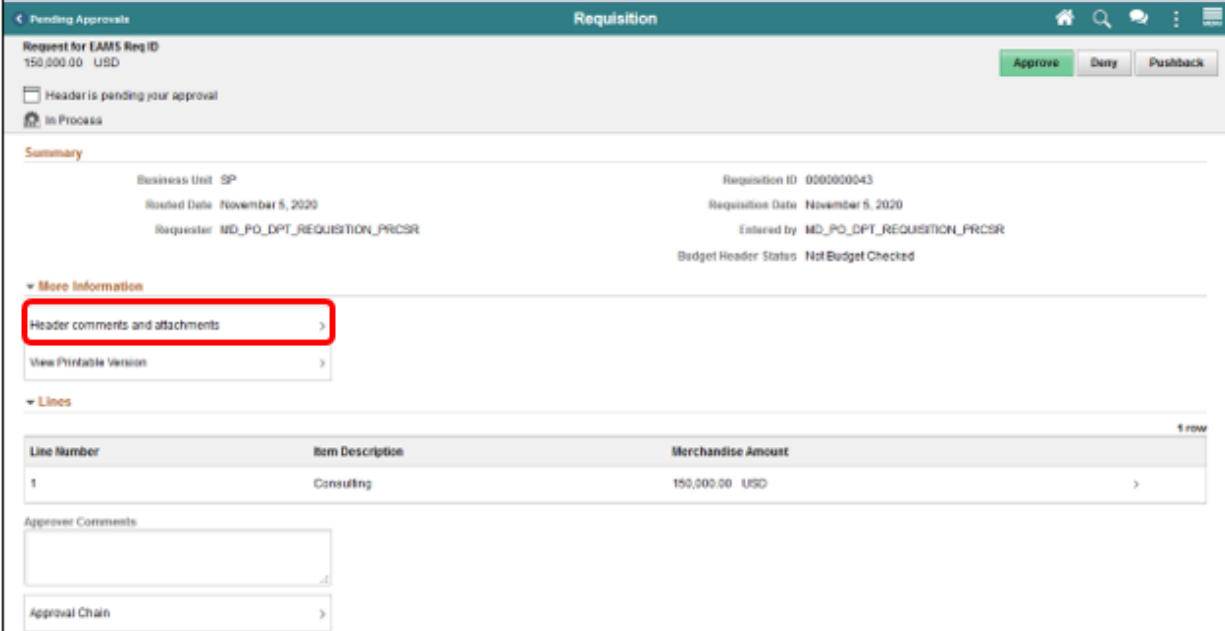
Pending Approvals			
View By <input type="text" value="Type"/>			
 All 1		All	1 row
 Requisition 1		<b>Requisition</b> 150,000.00 USD	EAMS Req ID - SP / 0000000043 MD_PO_DPT_REQUISITION_PRCR  Medium Priority
			Routed 11/05/2020 >

## Lesson 2: Approving 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 will route the approver to the requisition header comments and attachments page.



**Requisition**

Request for EAMS Req ID  
150,000.00 USD

☐ Header is pending your approval

 In Progress

**Summary**

Business Unit: SP  
Routed Date: November 5, 2020  
Requester: MD\_PO\_DPT\_REQUESTION\_PRCOR

Requisition ID: 000000043  
Requisition Date: November 5, 2020  
Entered by: MD\_PO\_DPT\_REQUESTION\_PRCOR  
Budget Header Status: Not Budget Checked

**More Information**

**Header comments and attachments** >

[View Printable Version](#) >

**Lines**

Line Number	Item Description	Merchandise Amount
1	Consulting	150,000.00 USD

**Approver Comments**

**Approval Chain** >

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

**IMPORTANT!** The approver should validate that the market research meets the standards set by the departments purchasing unit. If the requisition requires a sourcing event, the attached market research will help the Buyer in developing the sourcing event details.

6. Select the **CLOSE** button. The action will route back to the requisition header approval page.

## Lesson 2: Approving a Requisition

### Lecture 3: Pushback a Requisition


### Requisition Header Comments and Attachments

Business Unit SP  
Requisition ID 0000000043

---

**Header Details**

▼ **Comment 1**

Sequence	Attached File
1	 Word_-_Documentum.docx

7. Select the **MORE** button. This action will route to the approval line detail page.

Pending Approvals
Requisition

Request for EAMS Req ID  
150,000.00 USD

Approve
Deny
Pushback

Header is pending your approval  
In Process

**Summary**


Business Unit SP  
Routed Date November 5, 2020  
Requester MD\_PO\_DPT\_REQUISITION\_PRCR

Requisition ID 0000000043  
Requisition Date November 5, 2020  
Entered by MD\_PO\_DPT\_REQUISITION\_PRCR  
Budget Header Status Not Budget Checked

▼ **More Information**

Header comments and attachments >  
View Printable Version >

▼ **Lines**

Line Number	Item Description	Merchandise Amount	
1	Consulting	150,000.00 USD	

Approver Comments

Approval Chain >

### Approval Line Detail Page:

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

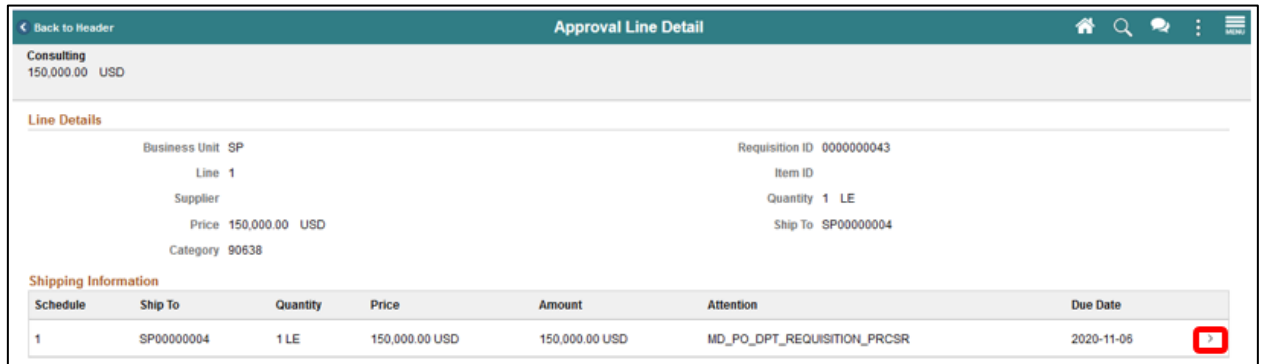
**IMPORTANT!** A requisition could be sourced to a purchase order and therefore carry over the shipping information. Inaccurate data in this section could have an impact on the receiving process (centralized or decentralized).



## Lesson 2: Approving a Requisition

### Lecture 3: Pushback a Requisition

11. Select the **MORE** button. This action will route to the distribution page.



**Approval Line Detail**

Consulting  
150,000.00 USD

**Line Details**

Business Unit SP  
Line 1  
Supplier  
Price 150,000.00 USD  
Category 90638

Requisition ID 0000000043  
Item ID  
Quantity 1 LE  
Ship To SP00000004

**Shipping Information**

Schedule	Ship To	Quantity	Price	Amount	Attention	Due Date
1	SP00000004	1 LE	150,000.00 USD	150,000.00 USD	MD_PO_DPT_REQUISITION_PRCR	2020-11-06

**Distribution Page:** The distribution page displays the ChartField entries selected by the requisitioner.

**IMPORTANT!** The accounting information entered at the beginning of the procure-to-pay process (requisition) will carry over to the purchase order and voucher. It is critical to the process that the correct ChartField values have been added.

12. Confirm the **FUND CODE** value.
13. Confirm the **DEPARTMENT** value.
14. Confirm the **ACCOUNT** value.
15. Confirm 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.

**IMPORTANT!** 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 it is not being expensed to a project.

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

## Lesson 2: Approving a Requisition

### Lecture 3: Pushback a Requisition

Distributions											
<b>Fluid Approval Distribution</b>											
Line 1											
Schedule 1											
Item Description Consulting											
Merchandise Amount 150,000.00 USD											
Quantity 1.0000 LE											
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			

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

Back to Header

Approval Line Detail

Consulting

150,000.00 USD

Line Details

Business Unit

SP

Line

1

Supplier

Price

150,000.00 USD

Category

90638

Requisition ID

0000000043

Item ID

Quantity

1 LE

Ship To

SP000000004

Shipping Information

Schedule	Ship To	Quantity	Price	Amount	Attention	Due Date
1	SP000000004	1 LE	150,000.00 USD	150,000.00 USD	MD_PO_DPT_REQUISITION_PRCR	2020-11-06

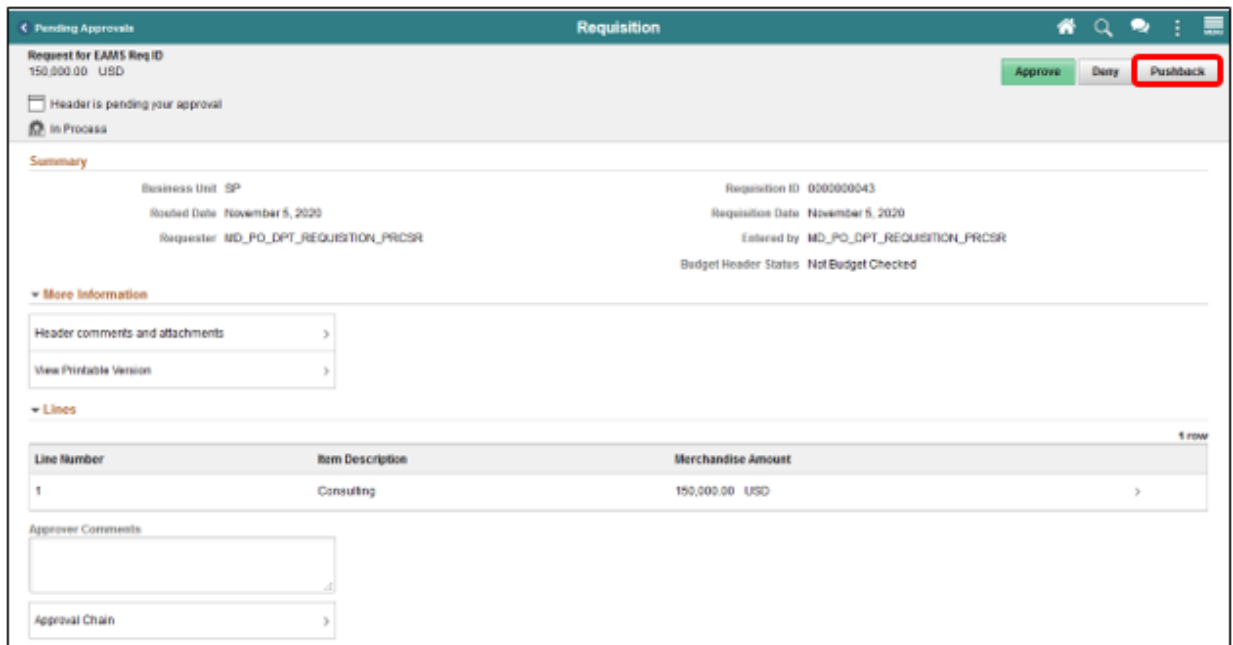
## Lesson 2: Approving a Requisition

### Lecture 3: Pushback a Requisition

#### Requisition Header Page:

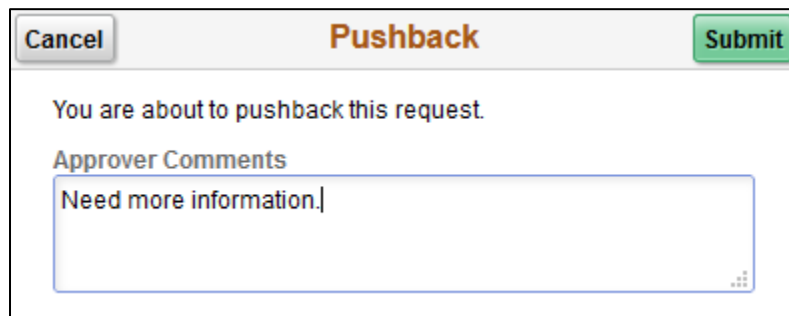
**Note:** Only the second, third, and or fourth approvers can use the pushback functionality. A pushback action returns the transaction to the previous approval step, requiring the prior approver to reevaluate the approval. The meaning of pushback is that the approver is questioning the prior step's approval and is requesting clarification on the transaction before a potential denial of the transaction (will be covered in another lecture).

22. Select the **PUSHBACK** button once all requisition values have been reviewed and confirmed. The system will display the approver comments page.



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

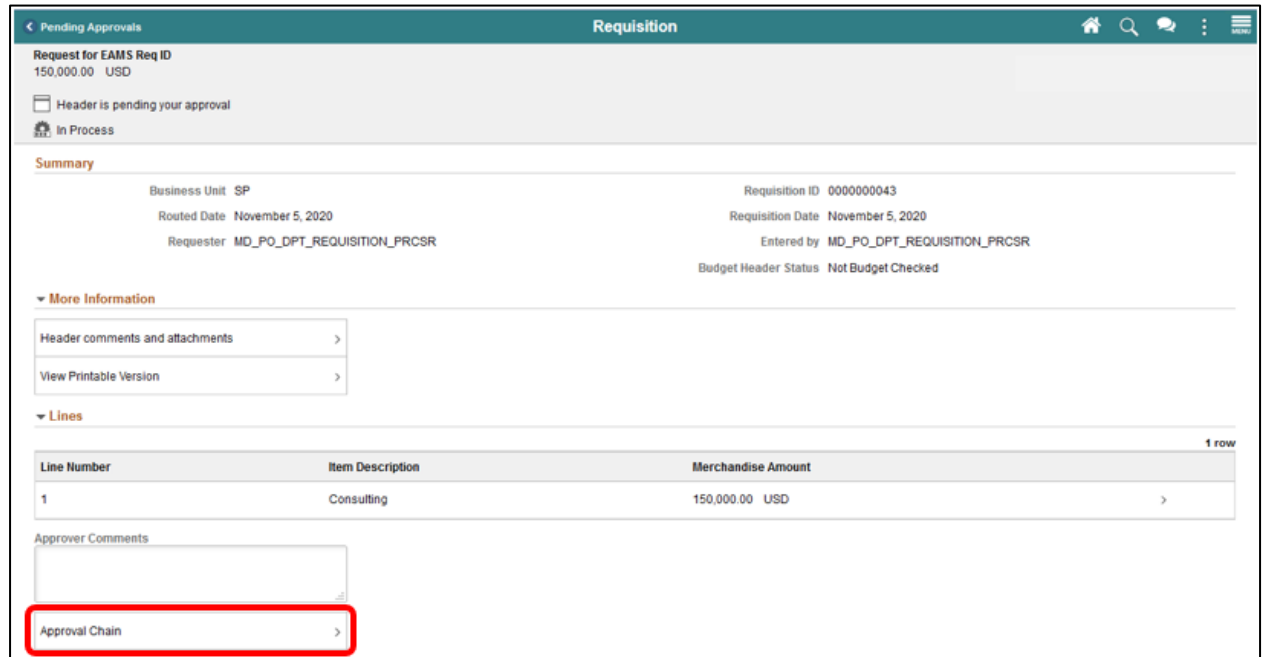
23. Select the **SUBMIT** button. This action will return to the requisition header page.



## Lesson 2: Approving a Requisition

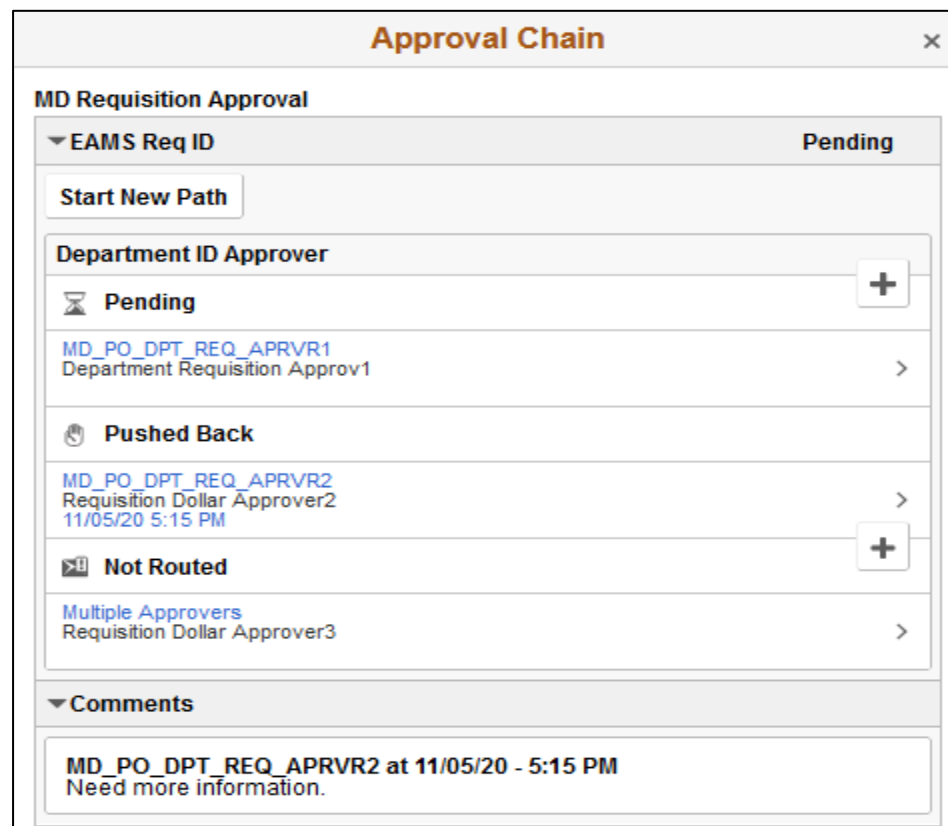
24. Select the **APPROVAL CHAIN** button. This action will display the approval chain page.

### Lecture 3: Pushback a Requisition



The screenshot shows the 'Requisition' page for a request for EAMS Req ID 150,000.00 USD. The page is in 'In Process' status. The 'Summary' section displays the Business Unit (SP), Routed Date (November 5, 2020), Requisition ID (0000000043), and Requester (MD\_PO\_DPT\_REQUISITION\_PRCR). The 'More Information' section includes links for 'Header comments and attachments' and 'View Printable Version'. The 'Lines' section shows a single line item for Consulting with a Merchandise Amount of 150,000.00 USD. At the bottom, the 'Approval Chain' button is highlighted with a red box.

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



The screenshot shows the 'Approval Chain' page for 'MD Requisition Approval'. The 'EAMS Req ID' is 'Pending'. The 'Start New Path' button is visible. The 'Department ID Approver' section shows a list of approvers with their status and a '+' button to add more. The 'Pushed Back' section shows a list of approvers with their status and a '+' button to add more. The 'Not Routed' section shows a list of approvers with their status and a '+' button to add more. The 'Comments' section shows a comment from 'MD\_PO\_DPT\_REQ\_APRVR2' at 11/05/20 - 5:15 PM, stating 'Need more information.'

## Lesson 1: Training Exercise 3

### Debrief



(True/False) The meaning of pushback is that the approver is questioning the prior step's approval and is requesting clarification on the transaction before a potential denial of the transaction

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(True/False) The first, second, third, and or fourth approvers can use the pushback functionality.

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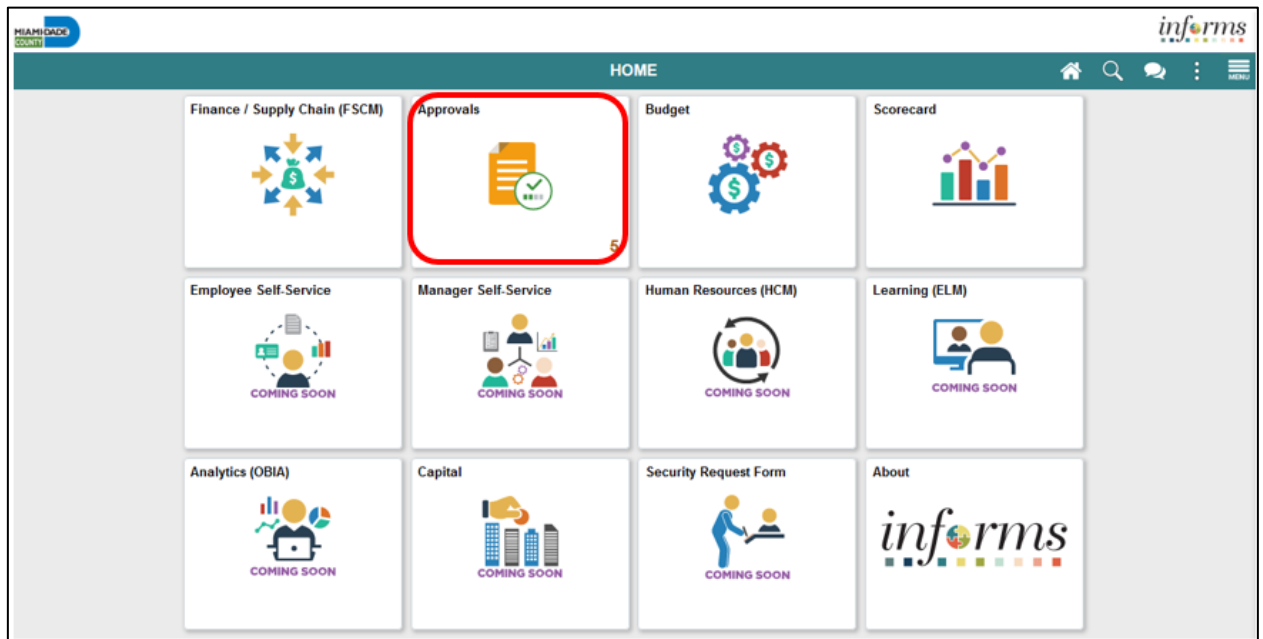
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## Lesson 2: Approving a Requisition

### Lecture 4: Hold a Requisition

#### Navigation to: **Approvals** tile

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



**Pending Approvals Page:** The pending approval 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 will only cover the hold of a requisition. Also, Miami-Dade County will 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.

HOME

Pending Approvals

Home

Search

Chat

Menu

View By

Type

All

6

Requisition

6

All

6 rows

Requisition

200.00 USD

EAMS Req ID - SP / 0000000057 MD\_PO\_DPT\_REQUISITION\_PRCR

Warning

Medium Priority

Routed

11/17/2020

Requisition

200.00 USD

EAMS REQ ID - SP / 0000000058 MD\_PO\_DPT\_REQUISITION\_PRCR

Warning

Medium Priority

Routed

11/17/2020

Requisition

900.00 USD

EAMS REQ ID - SP / 0000000059 MD\_PO\_DPT\_REQUISITION\_PRCR

Warning

Medium Priority

Routed

11/17/2020

Requisition

0.00 USD

EAMS Req ID - SP / 0000000060 MD\_PO\_DPT\_REQUISITION\_PRCR

Warning

Medium Priority

Routed

11/19/2020

Requisition

13.94 USD

EAMS REQ ID - IT / 0000000150 MD\_PO\_DPT\_REQUISITION\_PRCR

Warning

Medium Priority

Routed

11/27/2020

Requisition

27.88 USD

EAMS REQ ID - IT / 0000000153 MD\_PO\_DPT\_REQUISITION\_PRCR

Warning

Medium Priority

Routed

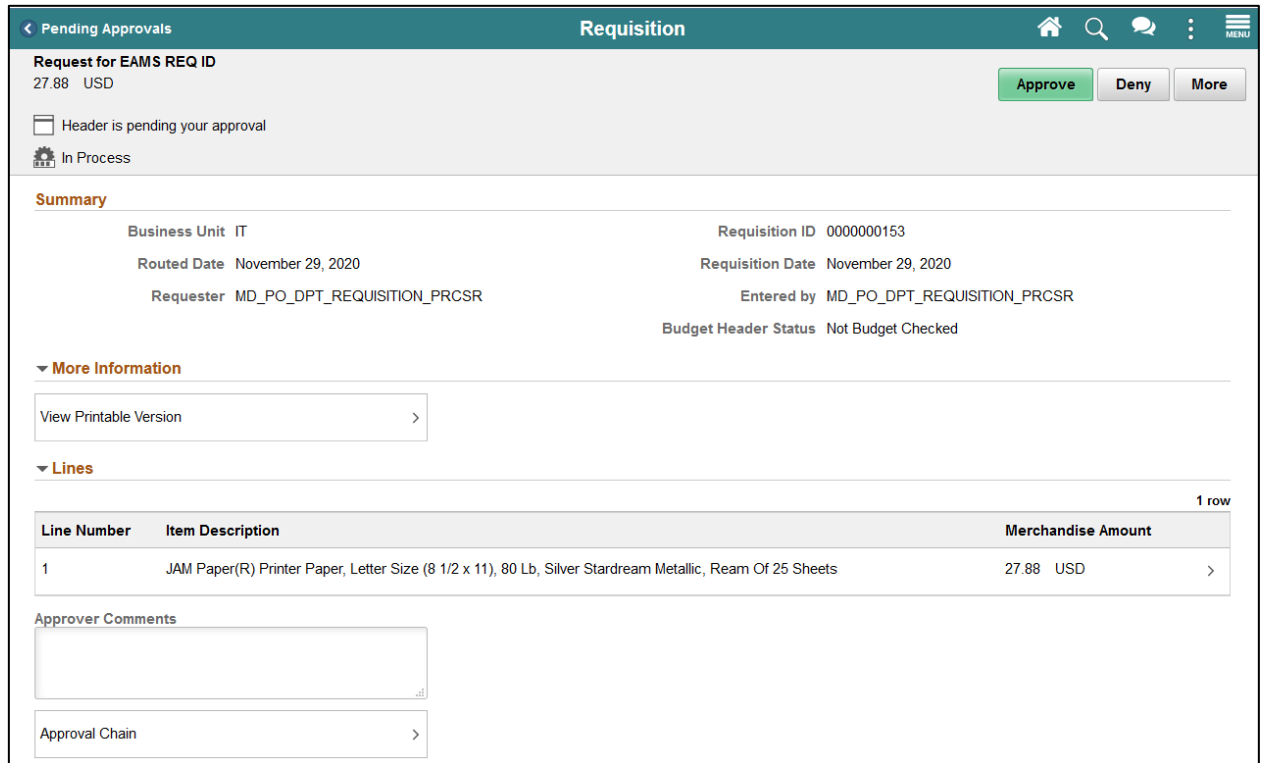
11/29/2020

## Lesson 2: Approving a Requisition

### Lecture 4: Hold a Requisition

**Requisition Header Approval Page:** The requisition header approval page displays the requisition header, lines, and approver comments. **IMPORTANT!** Approvers should review all four layers of a requisition and comments/attachments before taking action.

2. Select the **MORE** button. The system will display the additional approval tasks.



The screenshot shows the 'Pending Approvals' page for a requisition. The header includes 'Request for EAMS REQ ID 27.88 USD' and buttons for 'Approve', 'Deny', and 'More'. Below the header, there is a 'Summary' section with fields for Business Unit (IT), Routed Date (November 29, 2020), Requisition ID (0000000153), Requisition Date (November 29, 2020), Requester (MD\_PO\_DPT\_REQUISITION\_PRCR), Entered by (MD\_PO\_DPT\_REQUISITION\_PRCR), and Budget Header Status (Not Budget Checked). A 'More Information' section contains a 'View Printable Version' link. Below that is a 'Lines' section with a table showing one line item: 'JAM Paper(R) Printer Paper, Letter Size (8 1/2 x 11), 80 Lb, Silver Stardream Metallic, Ream Of 25 Sheets' with a merchandise amount of 27.88 USD. At the bottom, there are fields for 'Approver Comments' and 'Approval Chain'.

**IMPORTANT!** 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 will display the approver comments page.



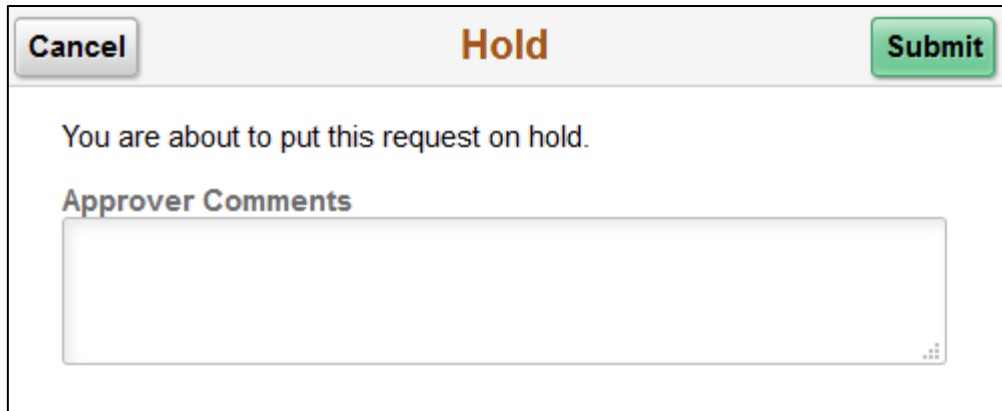
This screenshot is similar to the previous one, but it highlights the 'More' button in the top right corner. A dropdown menu is open, showing two options: 'Pushback' and 'Hold'. The 'Hold' button is highlighted with a red rectangle, indicating the action to be taken.

## Lesson 2: Approving a Requisition

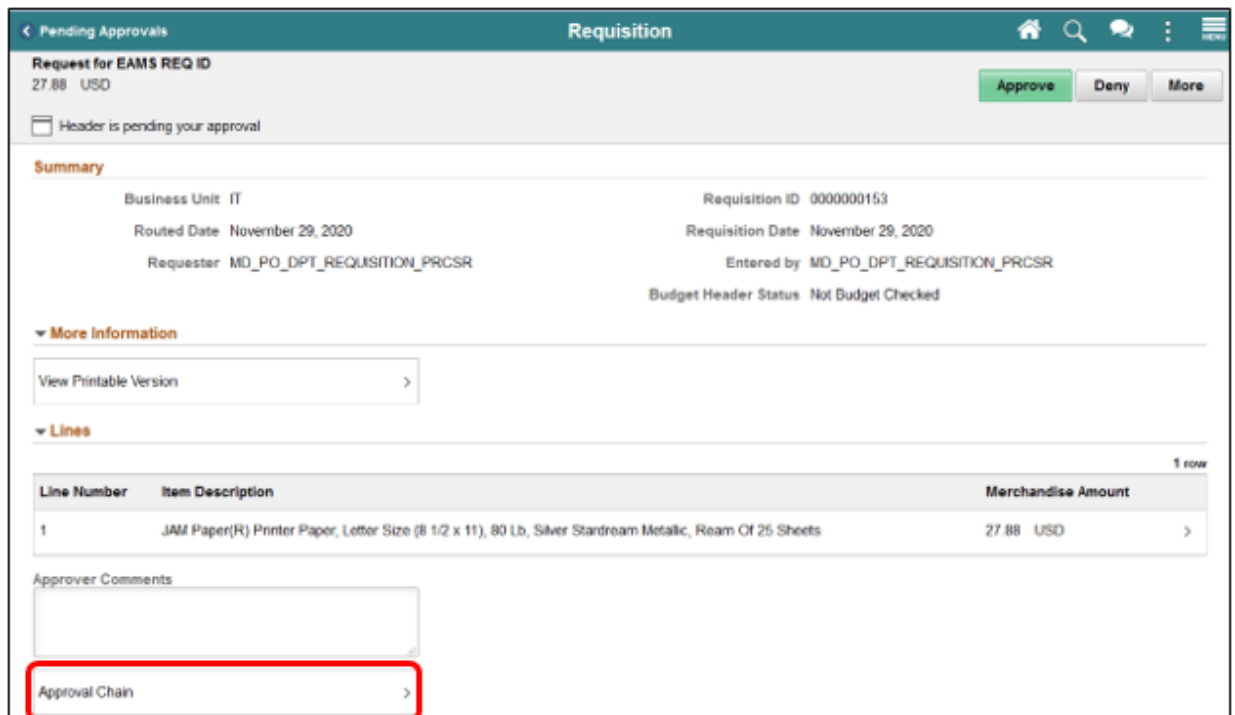
### Lecture 4: Hold a Requisition

**Note:** The requisition approver should enter explicit 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 will return the approver to the requisition header page.



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





## Lesson 2: Approving a Requisition

### Lecture 4: Hold a Requisition

**IMPORTANT!** The approver can confirm that the requisition approval status reflects on hold.

### Approval Chain

MD Requisition Approval

▼ EAMS REQ ID

Pending

Start New Path

Department ID Approver

⌚ On Hold

+

MD\_PO\_DPT\_REQ\_APRVR1

Department Requisition Approv1

11/29/20 11:32 PM

>

Project ChartField Req Appvr

👤 Skipped

No approvers found

Project Requisition Approver

>

⌚ Pending

+

Multiple Approvers

Error Step

>

## Lesson 2: Training Exercise 4

### Debrief



(True/False) 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.

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## Lesson 2: Lesson Summary

### Lesson Summary



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

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

## Module 4: Course Summary

### Objectives Achieved



Congratulations! You have completed the Manage and Record Requisitions Course. You now should be able to:

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

## Module 4: Course Summary

### Additional Training and Job Aids

Other training courses you may be eligible to take, based on the roles you are assigned, 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

Users also have the following resources available:

#### **User Productivity Kits**

- Create and Edit a Requisition
- Create a Web Supplier Requisition
- Create a Special Request Requisition
- Copy a Requisition
- Cancel a Requisition
- Approve Requisition

#### **Job Aids**

- N/A

For additional Information, be sure to visit:

- [Miamiidade.gov/informs](http://Miamiidade.gov/informs)

## Module 4: Course Summary

### Key Terms



The following key terms are used in this course:

Term	Definition
<b>Approval Line Detail Page</b>	The Approval Line Detail Page displays the requisition line and shipping information.
<b>Attention To</b>	The person to whom the goods/services are to be delivered.
<b>Business Unit</b>	Business Units are defined for each entity and used to maintain and report on transactional data.
<b>Catalog</b>	Displays all active NIGP items that can be selected to add to a requisition.
<b>Category</b>	Classifies asset by type for accounting entry and reporting.
<b>ChartField</b>	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).
<b>Checkout Page</b>	the last step before submitting the requisition for approval.
<b>Distribution Page</b>	The Distribution Page is the fourth layer of a requisition used to enter accounting information (ChartFields).
<b>Due Date</b>	The date the requester anticipates the receipt of the goods or service.
<b>Edit Requisition Page</b>	The Edit Requisition Page enables the requisitioner to make changes to the requisition.
<b>eProcurement</b>	the purchasing module that provides several ways for sourcing items to a requisition.
<b>Express Item Entry</b>	A requisition method that allows requisitioners to quickly add items to a requisition using a more straightforward online template.
<b>Favorites</b>	A user's personal list of navigation shortcuts.
<b>Fund Code</b>	The primary structural units of Education and Government accounting. At MDC this will capture the source of revenue\expenses and be a self-balancing ChartField.
<b>Item Catalog</b>	Facilitates selection of goods and services maintained in the Item Master table from a catalog during the creation of a requisition.
<b>Item ID</b>	The unique system identifier for an item.
<b>Items Detail Page</b>	The Items Detail Page displays the item description, negotiated price, and availability for all items that meet the selected item category.
<b>Line Details Page</b>	The Line Details Page is used to verify and edit additional details for a line.

## Module 4: Course Summary

### Key Terms

The following key terms are used in this course:



Term	Definition
<b>Manufacturer Item ID</b>	Displays the EAMS Manufacturer ID. This field is required for the EAMS and INFORMS integration.
<b>My Requisitions Page</b>	Used to view or take action on requisitions created by the requisitioner.
<b>National Institute of Government Purchasing (NIGP) Code</b>	A standard taxonomy for classifying goods and services. The intent of adopting a universal taxonomy is to improve visibility and conduct an in-depth analysis of spending to inform sourcing strategies and improve buying efficiency.
<b>Pending Approval Page</b>	The Pending Approval Page displays pending requisition header information for the approver to review.
<b>Product Details Page</b>	The Product Details Page provides item attributes such as the product description and specifications.
<b>Punchout</b>	The process of leaving a requisition to access the County catalog to pull the items into a requisition for processing and sourcing to a PO
<b>Requestor</b>	A user that needs to procure goods or services.
<b>Requisition Header Approval Page</b>	The Requisition Header Approval Page displays the requisition header, lines, and approver comments.
<b>Requisition ID</b>	This field is a system generated number associated with a requisition.
<b>Requisition Lines section</b>	Also known as the “Line,” and the second layer of a requisition, the requisition lines section displays item details, adds functionality, and accesses the other requisition layers.
<b>Requisition Lines</b>	Also known as the "Line," and the second layer of a requisition, displays item details, adds functionality, and accesses the other requisition layers.
<b>Requisition Name</b>	Displays a description of the request to help you identify the requisition as it flows through the system. Certain departments will use this field to reflect the EAMS Requisition ID. If the field is left blank, the system used the requisition ID as the name
<b>Requisition Summary</b>	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).

## Module 4: Course Summary

### Key Terms

The following key terms are used in this course:

Term	Definition
<b>Requisition</b>	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 the purchase and how much of the total price each department should pay.
<b>Requisitioner</b>	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.
<b>Save Confirmation Page</b>	The Save confirmation Page is intended to enable the requisitioner to view a summary of the final requisition.
<b>Schedule Detail Page</b>	The Schedule Detail Page is the third layer of a requisition and it is used to review and modify schedule details for an item.
<b>Search Results Page</b>	The Search Results Page displays all items that met the search criteria.
<b>Ship To</b>	The department location where the supplier will ship the order.
<b>Shopping Cart Page</b>	The shopping cart page enables the requestor to review and update the shopping cart before proceeding to the checkout page.
<b>Shopping Cart Page</b>	Enables the requestor to review and update the shopping cart before proceeding to the checkout page.
<b>Special Request</b>	A method that allows requisitioners to enter item descriptions for goods or services that may not be active in the internal or external catalogs.
<b>Supplier Item ID</b>	Field will be used by certain departments to reflect EAMS Item ID
<b>Templates</b>	Allows requisitioners to group items together to simplify ordering.
<b>Web Suppliers Page</b>	The web suppliers page displays only those suppliers who have established a direct connection with Miami Dade County.