Miami-Dade County

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.

Table of Contents

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:

Roles and Responsibilities

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

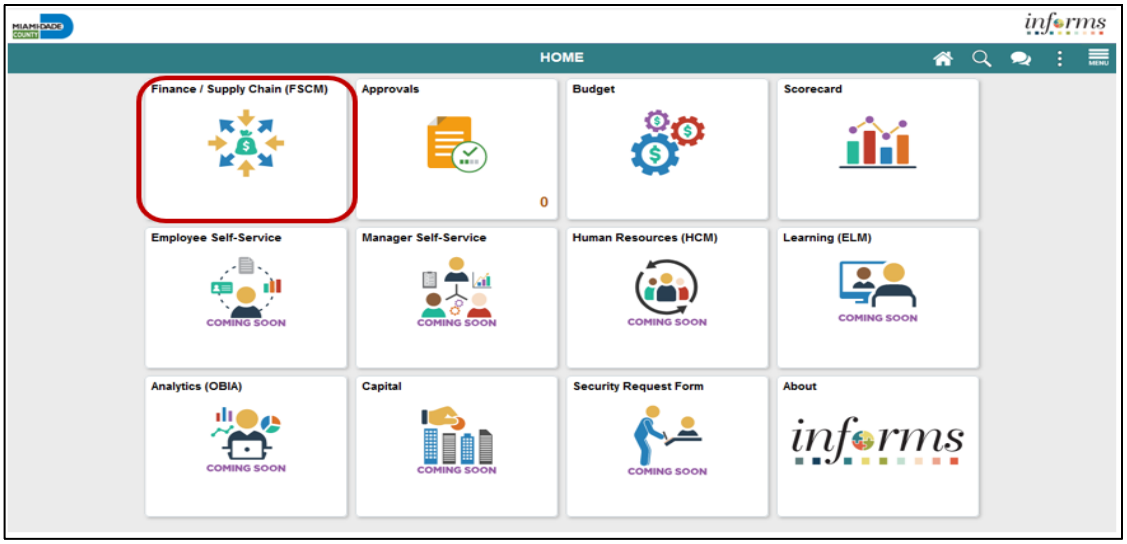
- **Department Buyer** – The Department Buyer has the ability to create and update Purchase Orders (PO), Change Orders - enter PO or source a PO from requisition, or change orders and dispatch.
- **Department Requisition Processor** – The Department Requisition Processor is a department end-user who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

Module 1: Course Introduction

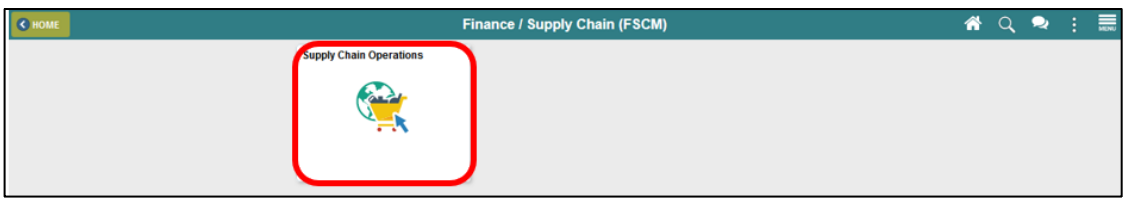
Navigation

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

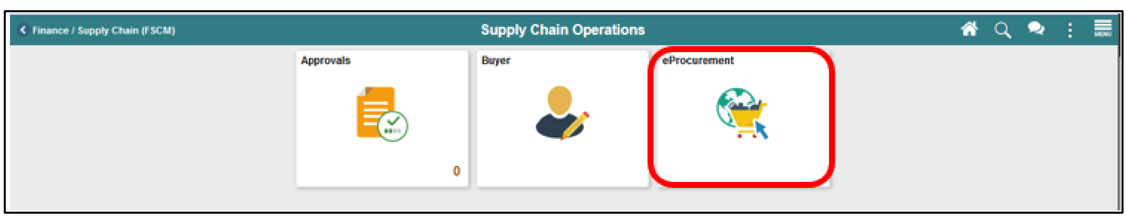
1. Login into **INFORMS** and select the **FINANCE/SUPPLY CHAIN (FSCM)** tile.



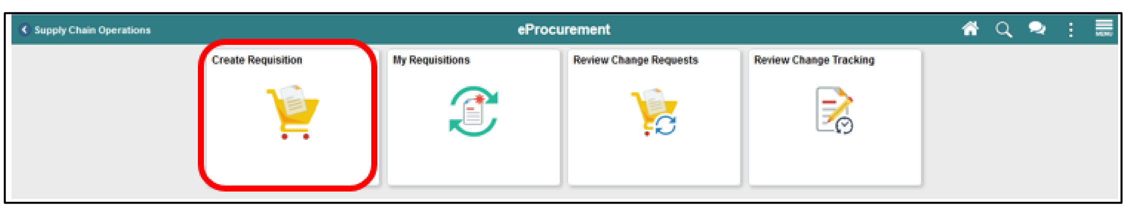
2. Select the **SUPPLY CHAIN OPERATION** tile.



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

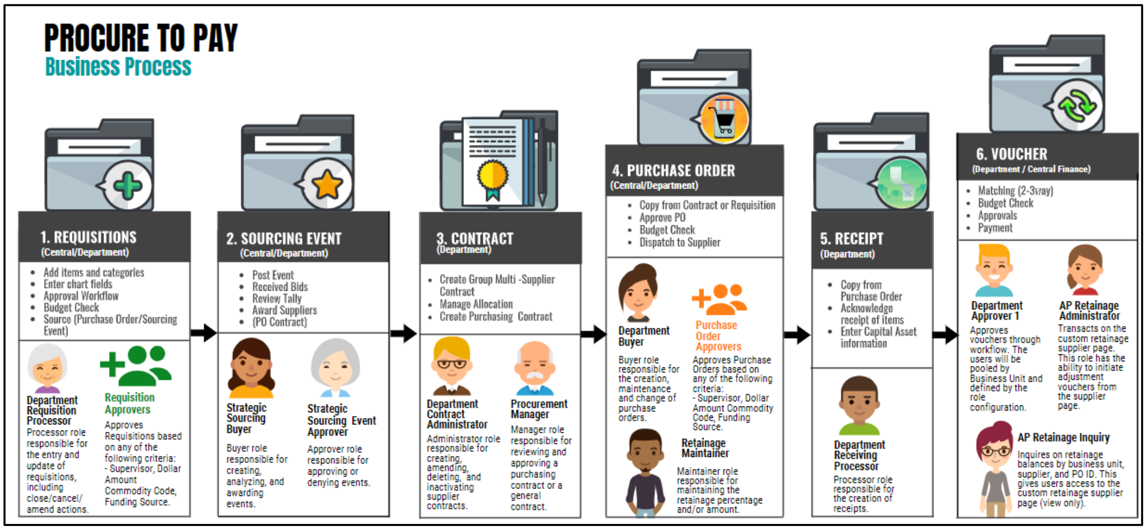
Key changes to the Business Process

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

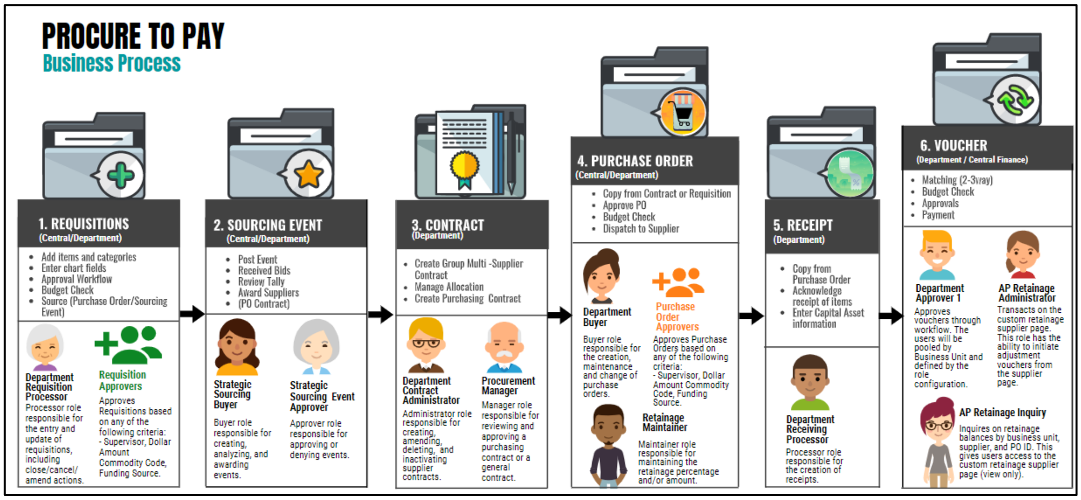


The INFORMS procure-to-pay process consist of the following high-level steps.
Note: There are additional steps not included below that will be addressed in other training material (e.g., Items, Suppliers):

- **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

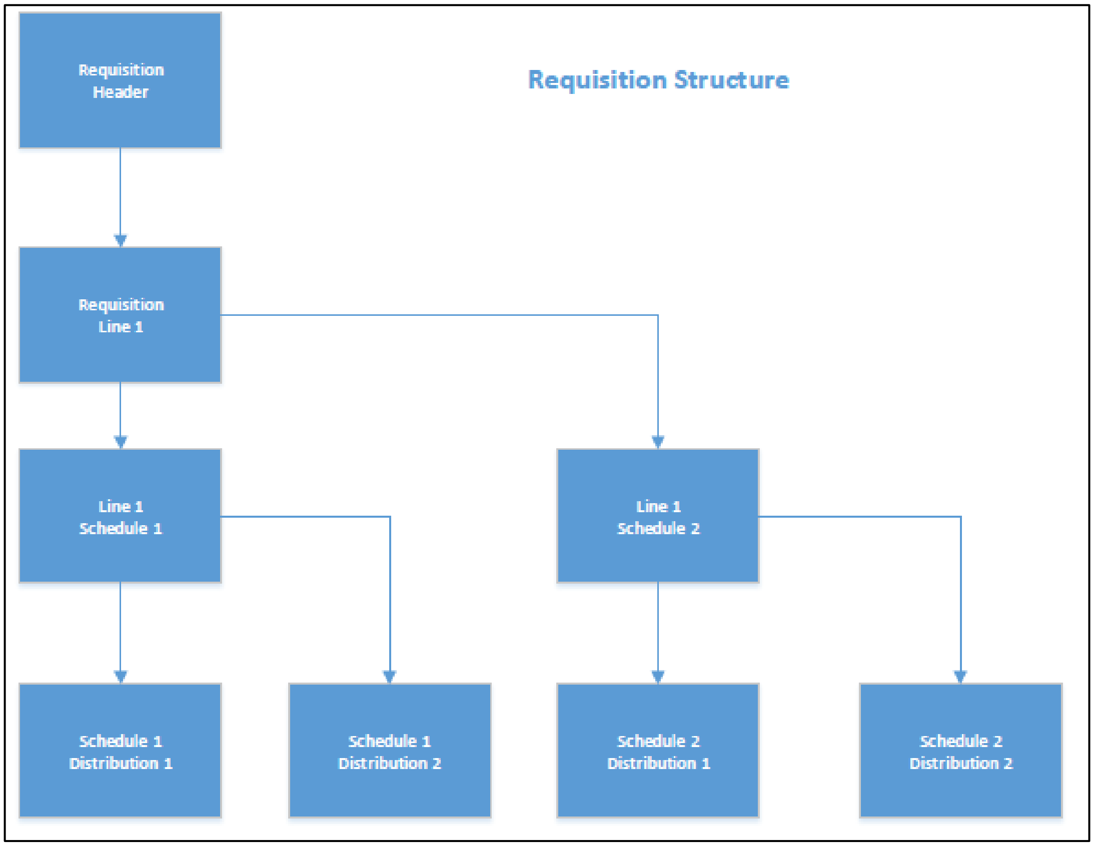
The End-to-End Business Process



- **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

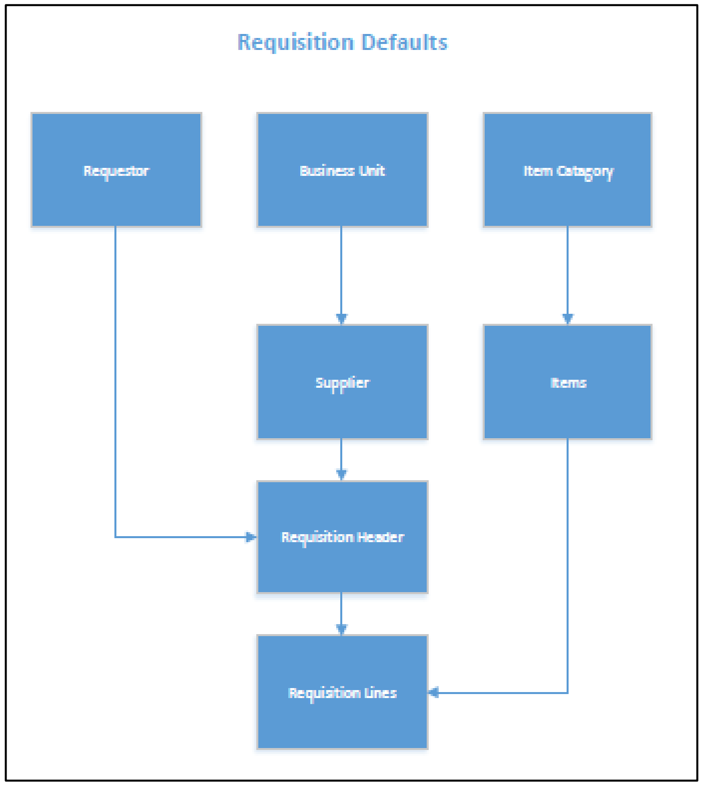
The End-to-End Business Process



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.
- Requester – Default from the requester's procurement user preference.
- Currency – Default from the purchasing business unit.
- Location – Default from the requester's procurement user preference.
- 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.

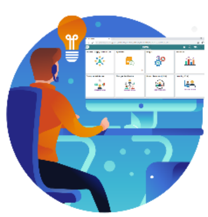
Instructor Demonstrations

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

Lesson 1: Create a Requisition

Key Terms

The following key terms are used in this Lesson:

Term	Definition
Fund Code	The primary structural units of Education and Government accounting. At MDC this will capture the source of revenue\expenses and be a self-balancing ChartField.
Item Catalog	Facilitates selection of goods and services maintained in the Item Master table from a catalog during the creation of a requisition.
Item ID	The unique system identifier for an item.
Items Detail Page	The Items Detail Page displays the item description, negotiated price, and availability for all items that meet the selected item category.
Line Details Page	The Line Details Page is used to verify and edit additional details for a line.
Manufacturer Item ID	Displays the EAMS Manufacturer ID. This field is required for the EAMS and INFORMS integration.
National Institute of Government Purchasing (NIGP) Code	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.
Product Details Page	The Product Details Page provides item attributes such as the product description and specifications.
Punchout	The process of leaving a requisition to access the County catalog to pull the items into a requisition for processing and sourcing to a purchase order.
Requestor	A user that needs to procure goods or services.

Lesson 1: Create a Requisition

Key Terms

The following key terms are used in this Lesson:

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

Lesson 1: Create a Requisition

Key Terms

The following key terms are used in this Lesson:

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

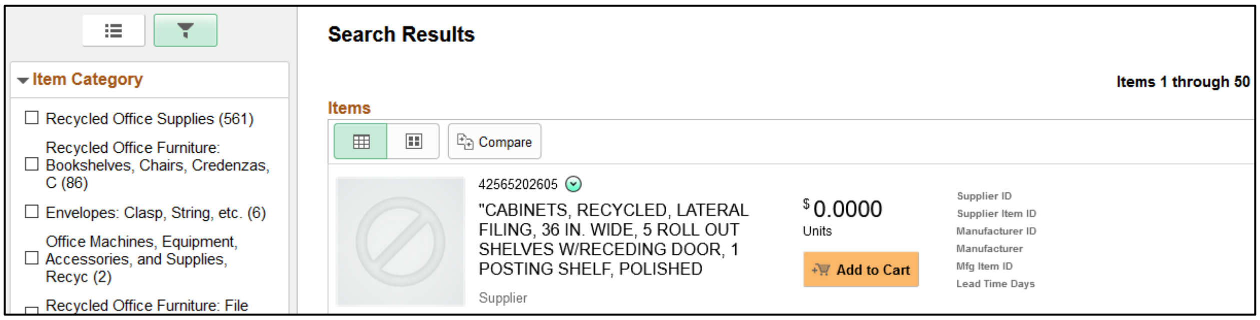
Lesson 1: Create a Requisition

Lecture 1: Selecting an Item

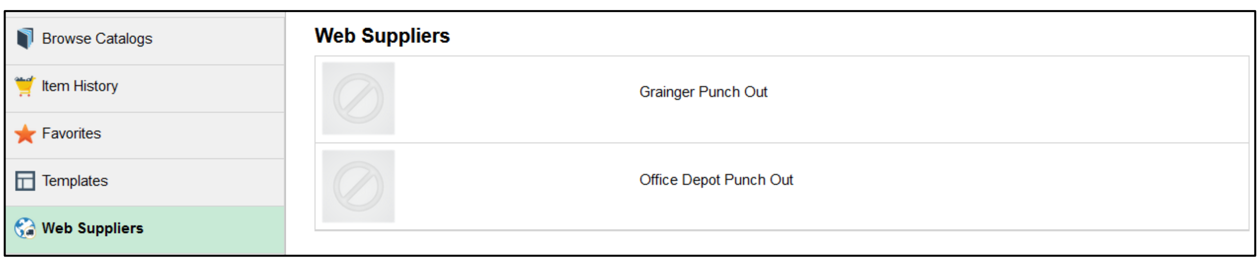
Selecting an Item:

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.

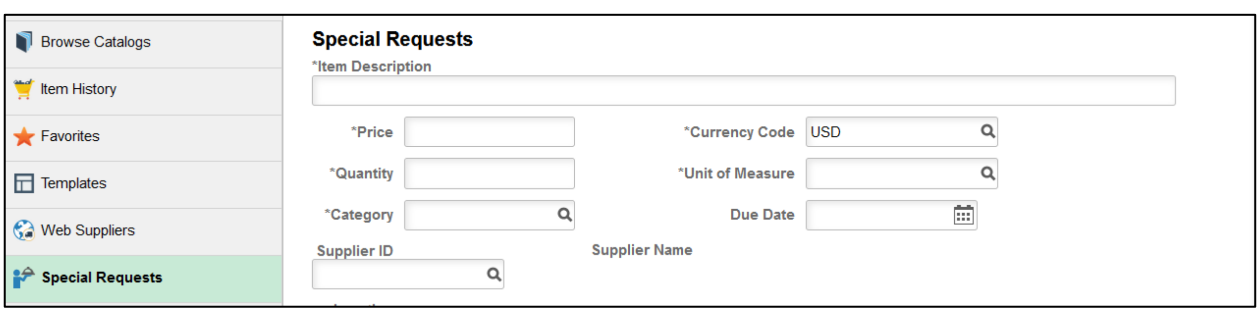
Catalogs – This is a method that consists of an internal catalog that Miami-Dade County has configured of active items (NIGP 7 to 11-Digits) and item categories (NIGP 5-digits) that will be available to all business units. Specific item categories may require additional catalogs, and access will be limited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



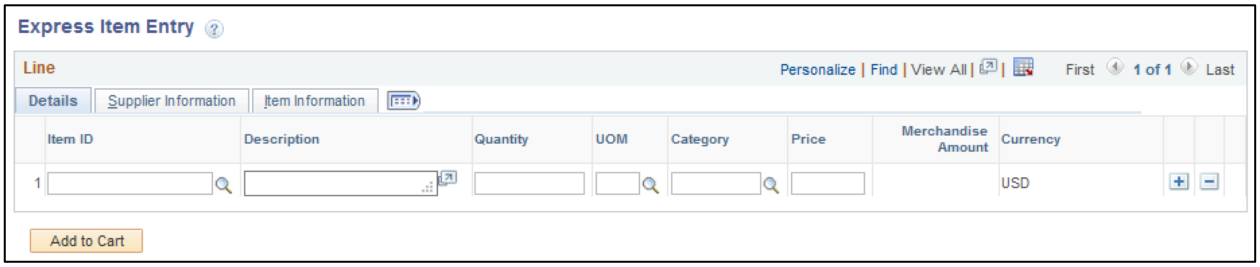
Special Request – This is a method to allow requisitioners to enter item descriptions for goods or services that may not be active in the internal or external catalogs.



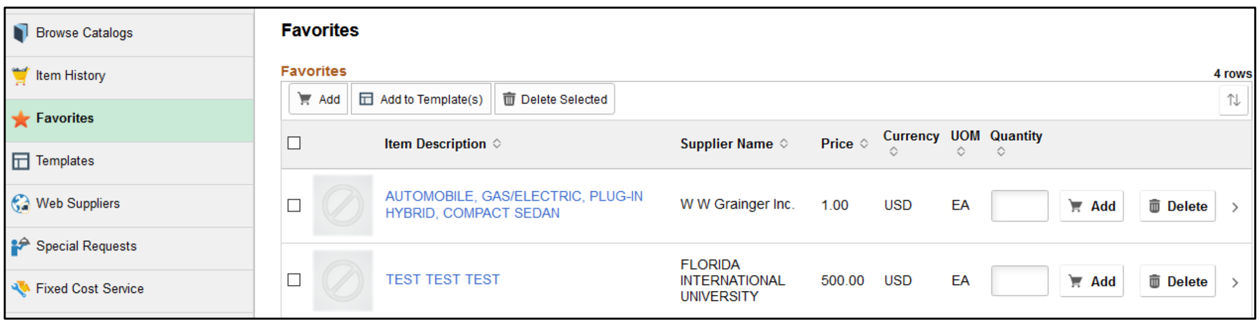
Lesson 1: Create a Requisition

Lecture 1: Selecting an Item

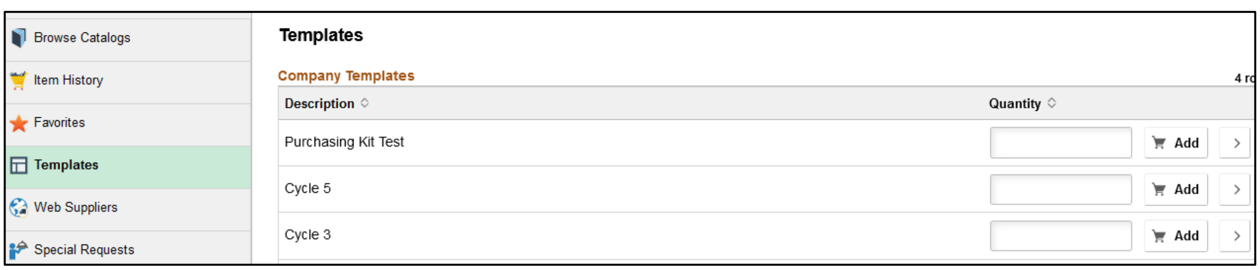
Express Item Entry – This is a method that allows requisitioners to quickly add items to a requisition using a more straightforward online template. Using this template will require the requisitioner to know the Item ID and Item Category.



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



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



Lesson 1: Training Exercise 1

Debrief

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

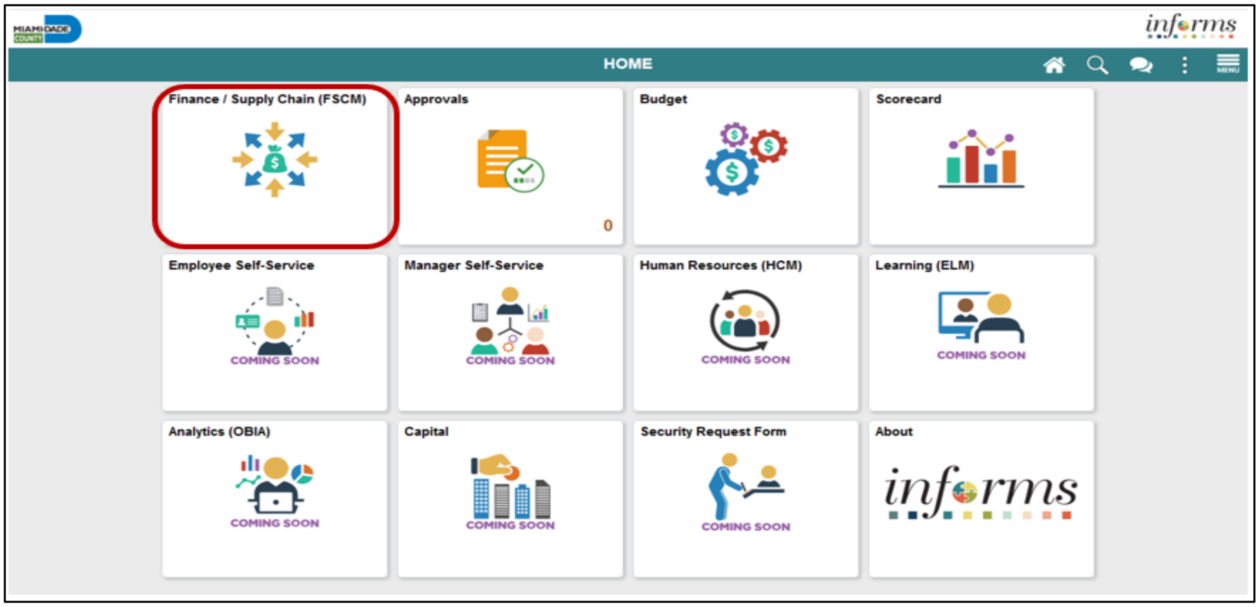
What purchasing method would you use to enter item descriptions for goods or services that may not be active in the internal or external catalogs?

Lesson 1: Create a Requisition

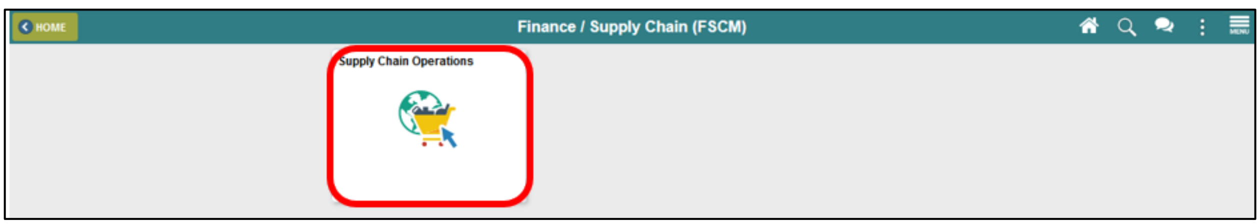
Lecture 2: Creating a Requisition from the Master Item Catalog

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

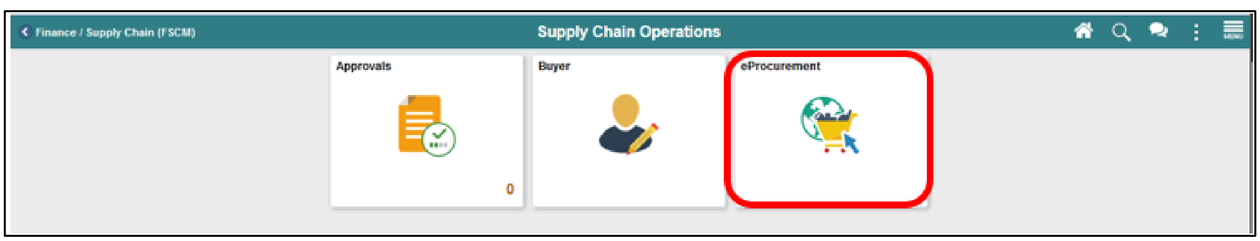
1. Login into **INFORMS** and select the **FINANCE/SUPPLY CHAIN (FSCM).**



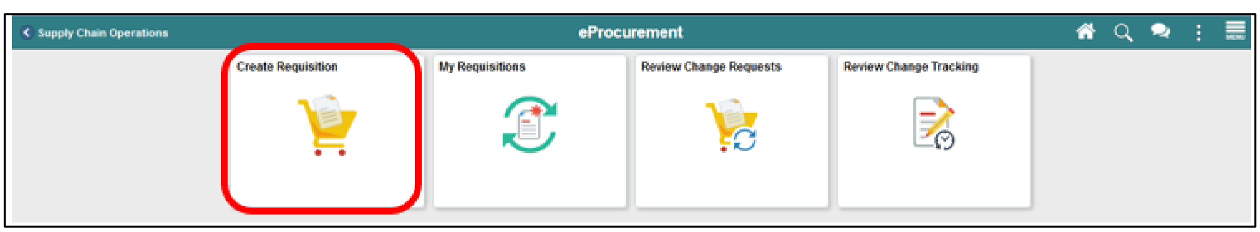
2. Select the **SUPPLY CHAIN OPERATION** tile.



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:

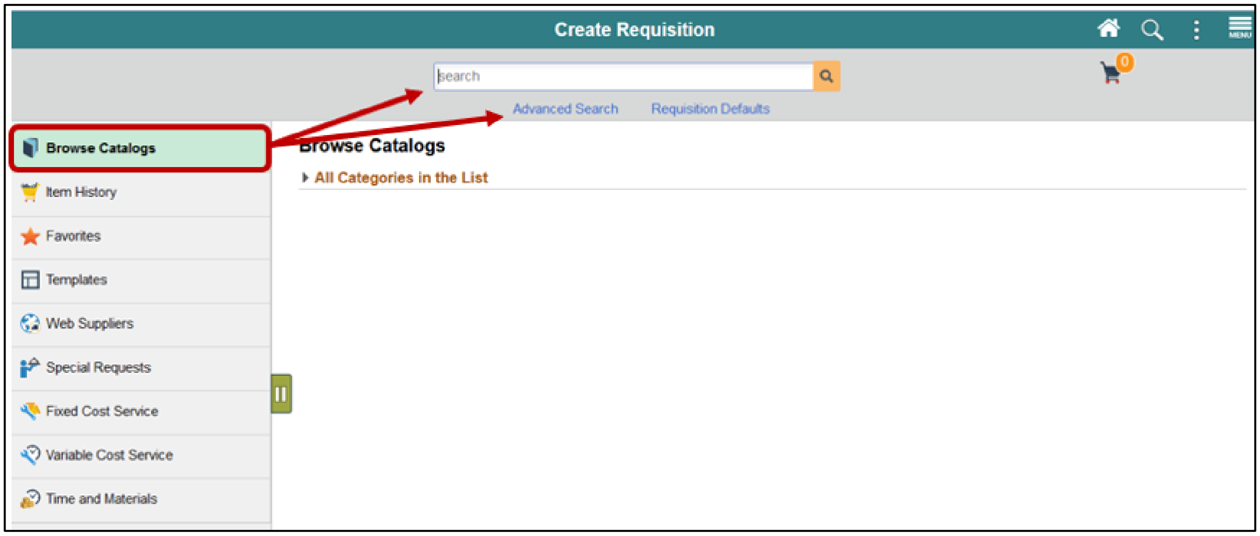
- **Attention To** – The person to whom the goods/services are to be delivered.
- **Business Unit** – The field defaults from the requisitioner's user profile. It represents the requisitioner’s department.
- **Catalog** – Displays all active NIGP items that can be selected to add to a requisition.
- **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

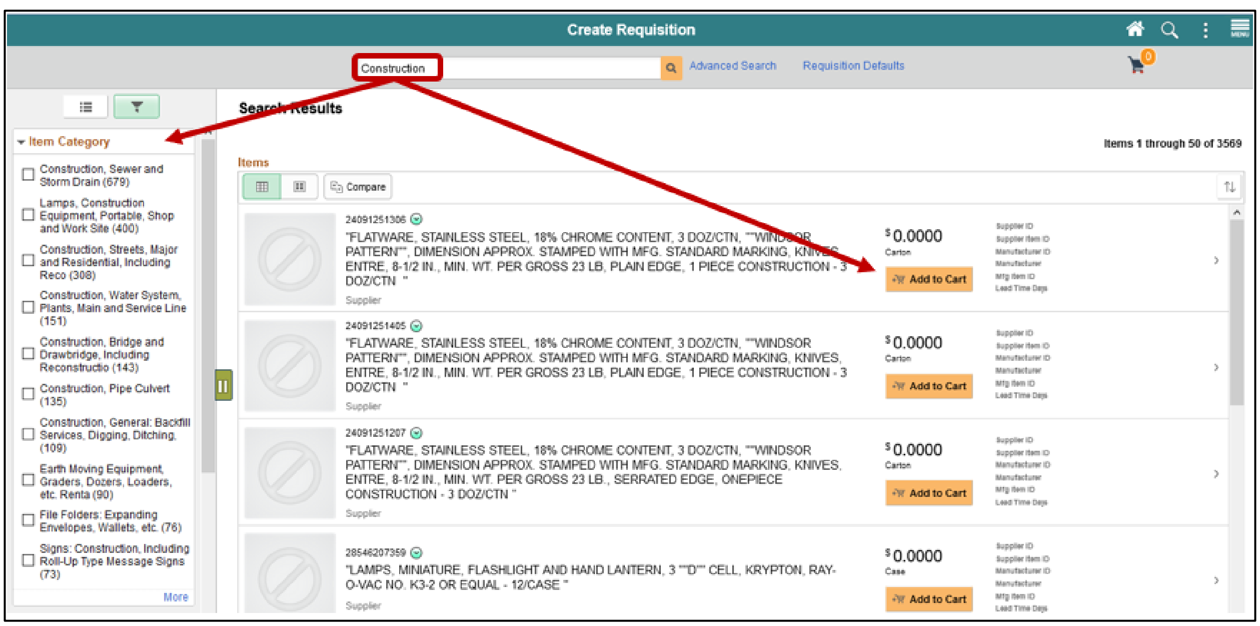
eProcurement Requisition Navigation Page:

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

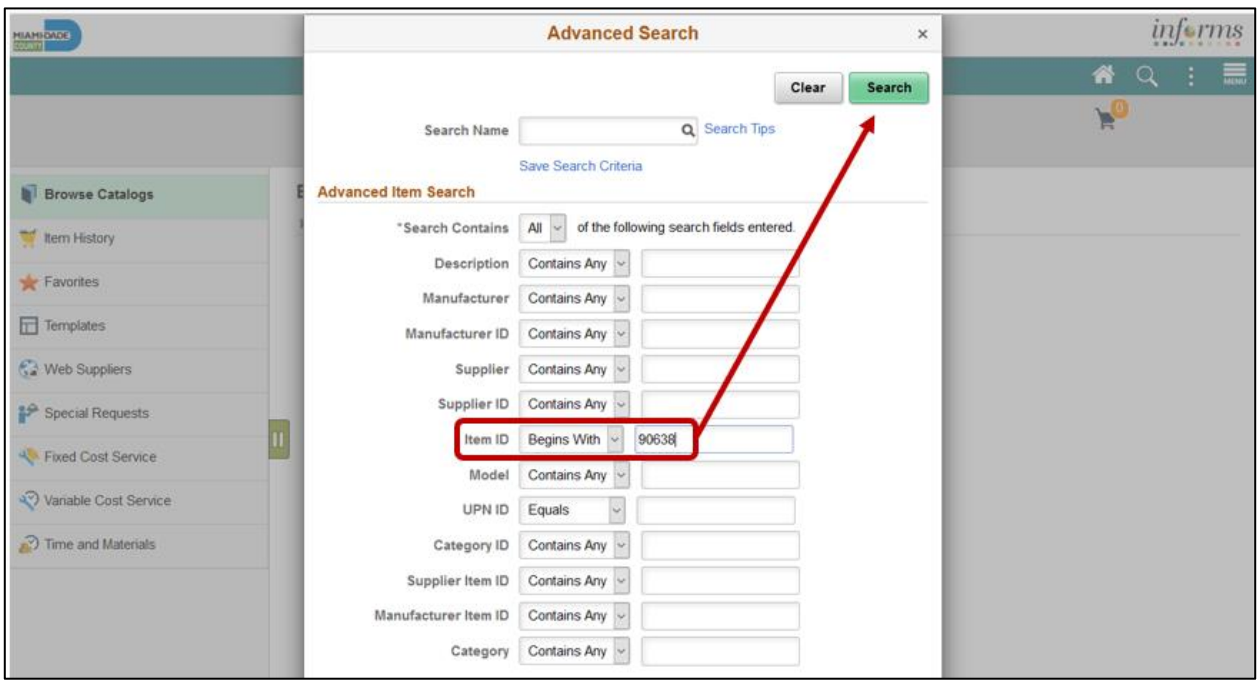
Lecture 2: Creating a Requisition from the Master Item Catalog

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 D** 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.



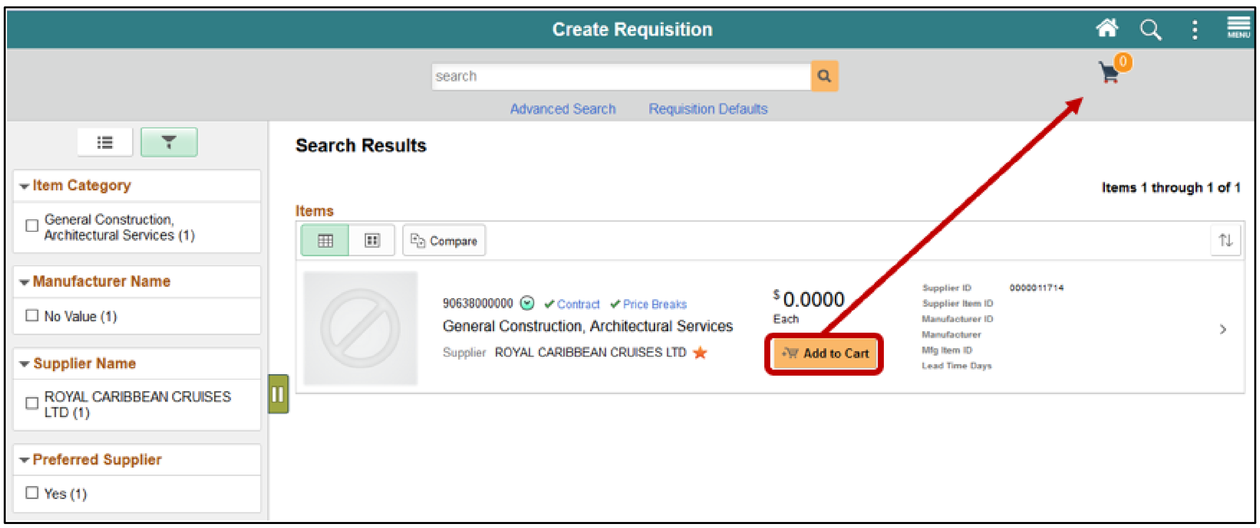
Lesson 1: Create a Requisition

Lecture 2: Creating a Requisition from the Master Item Catalog

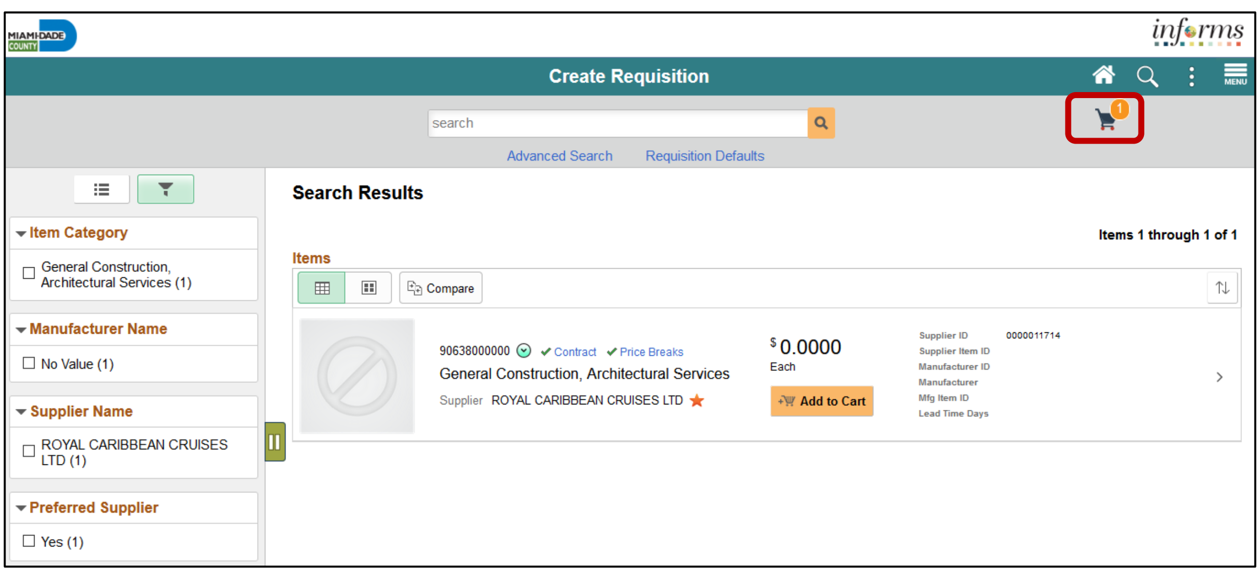
Search Results Page: The search results page displays all items that met the search criteria. The requisitioner will have a chance to refine their search results by selecting any of the menu options located on the left of the page. The menu includes the Item Category, Supplier Name, and the Preferred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

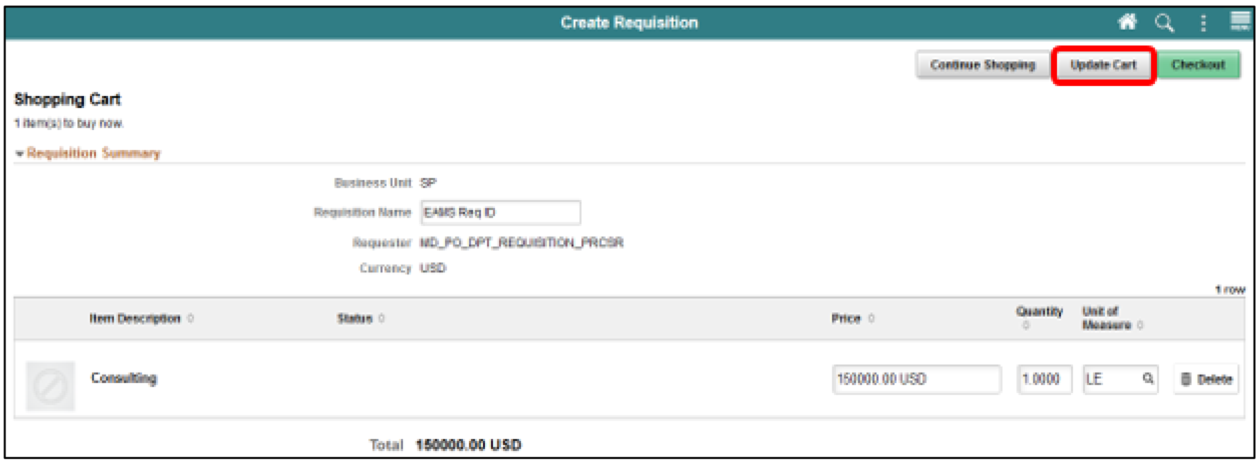


Lesson 1: Create a Requisition

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:

a. 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.
b. The **QUANTITY** field can be modified.
c. The **DELETE** button can be selected to remove items from the shopping cart.
d. The **CONTINUE SHOPPING** button can be selected to return to the Miami-Dade Item Catalog to add additional items.
e. Once changes have been made to the shopping cart, it will be necessary to select the **UPDATE CART** button to save any changes.



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.

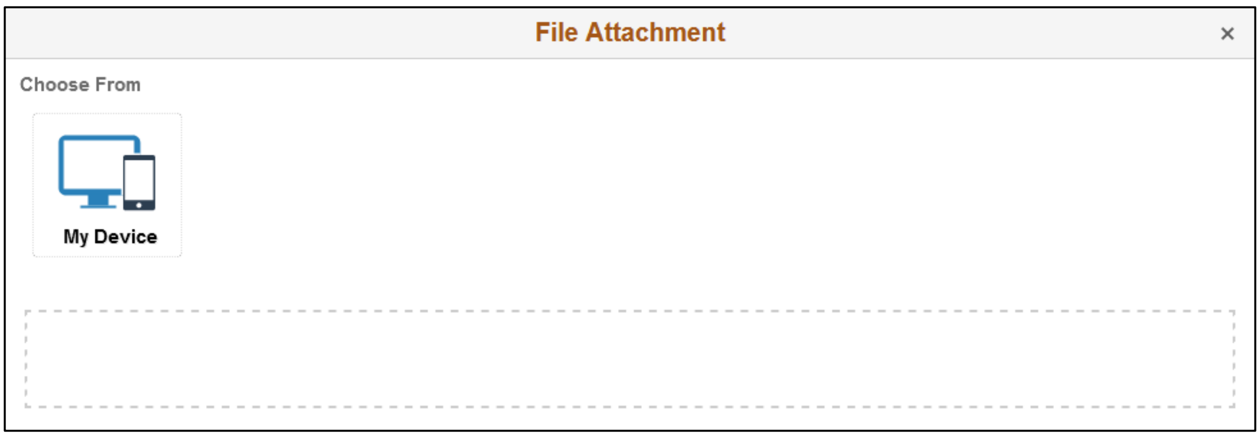
Lesson 1: Create a Requisition

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.

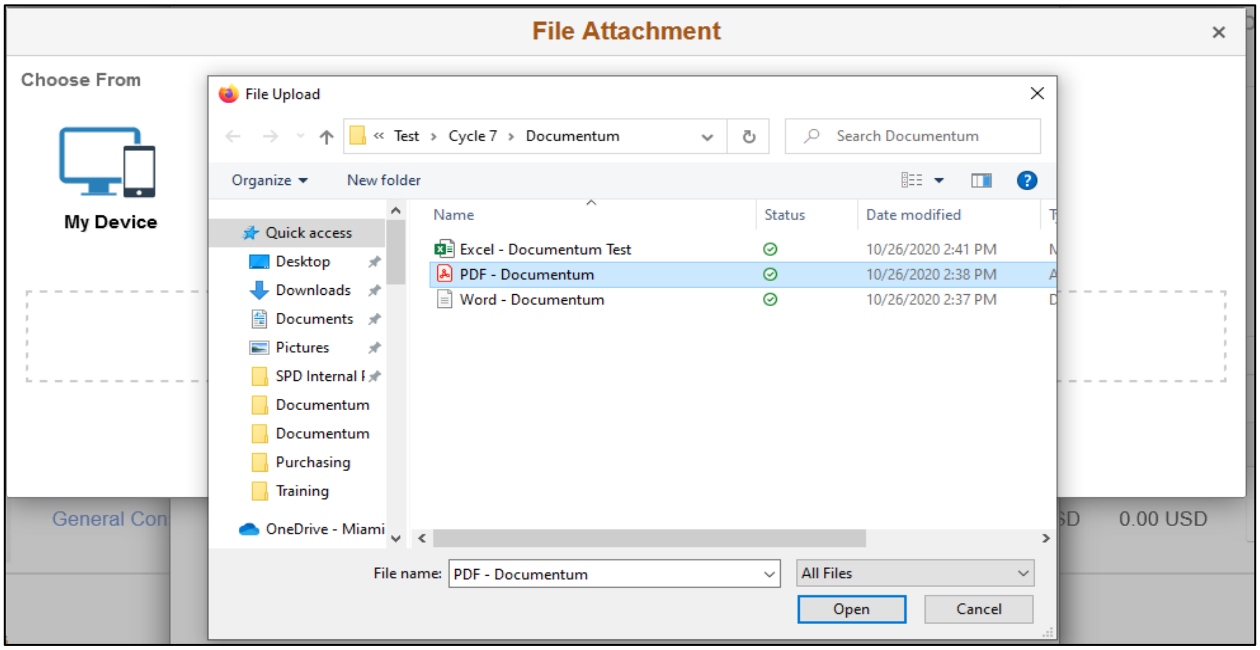


Lesson 1: Create a Requisition

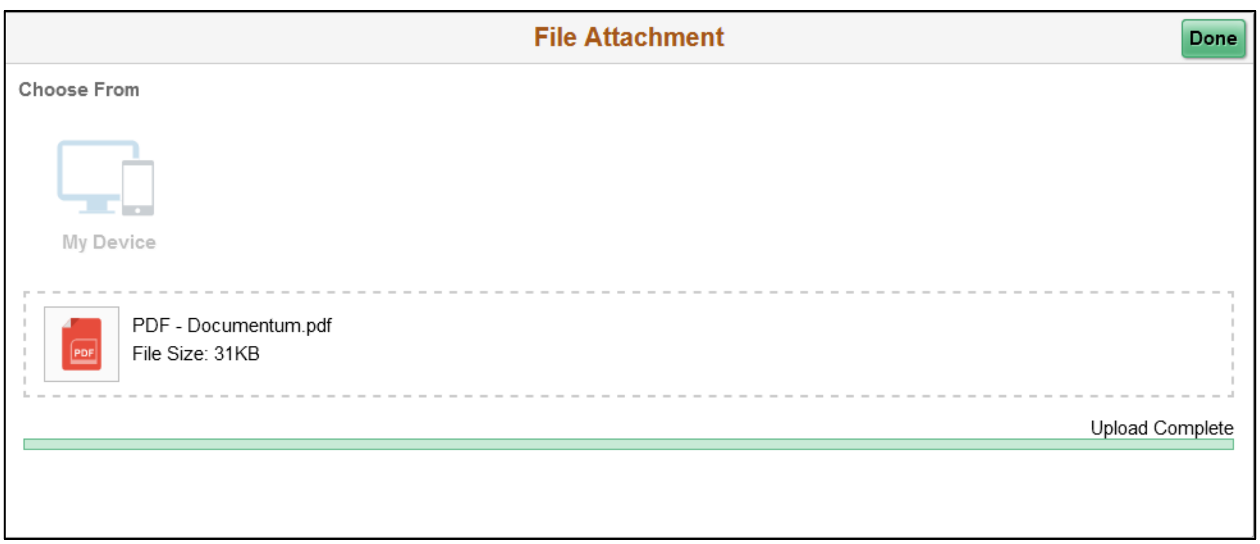
Lecture 2: Creating a Requisition from the Master Item Catalog

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.



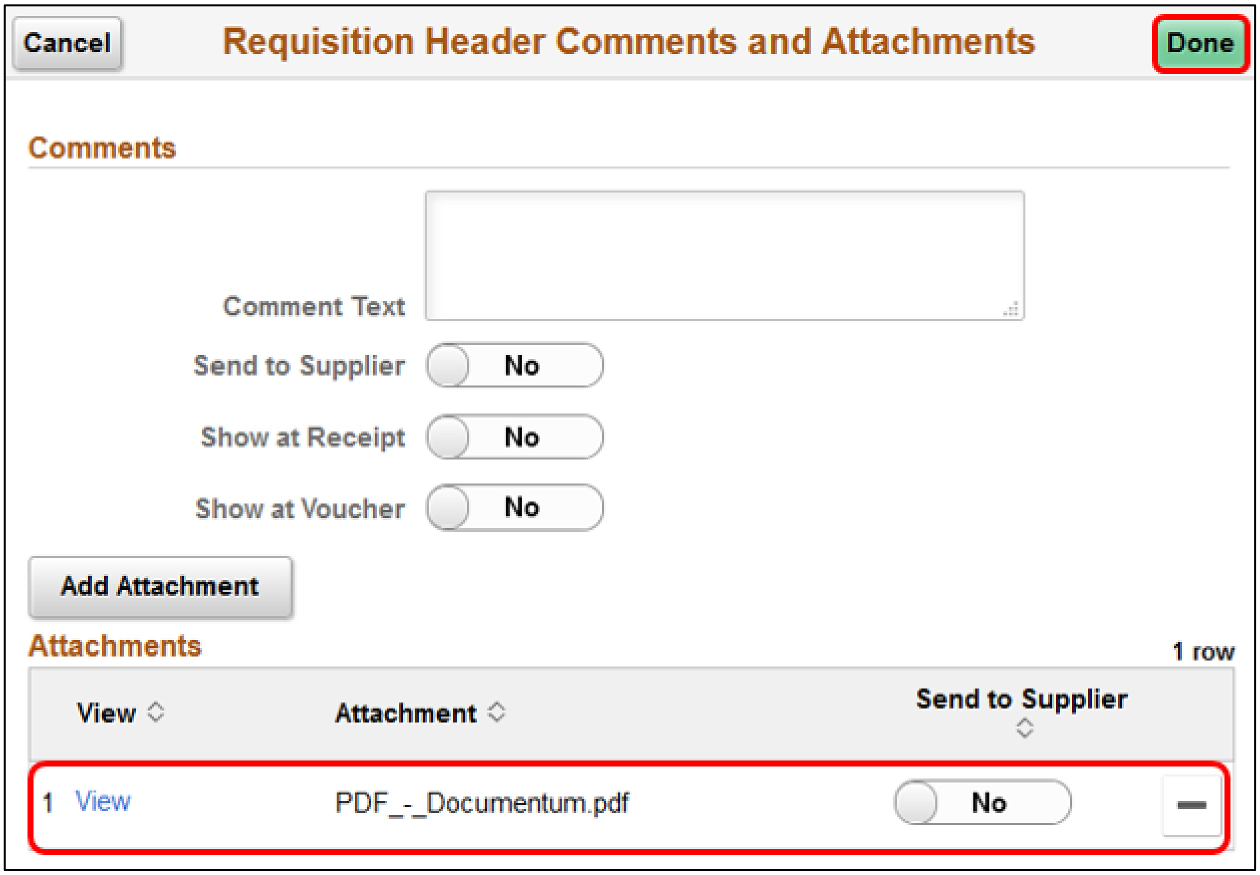
16. Confirm the file upload is complete and select the **DONE** button.



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.

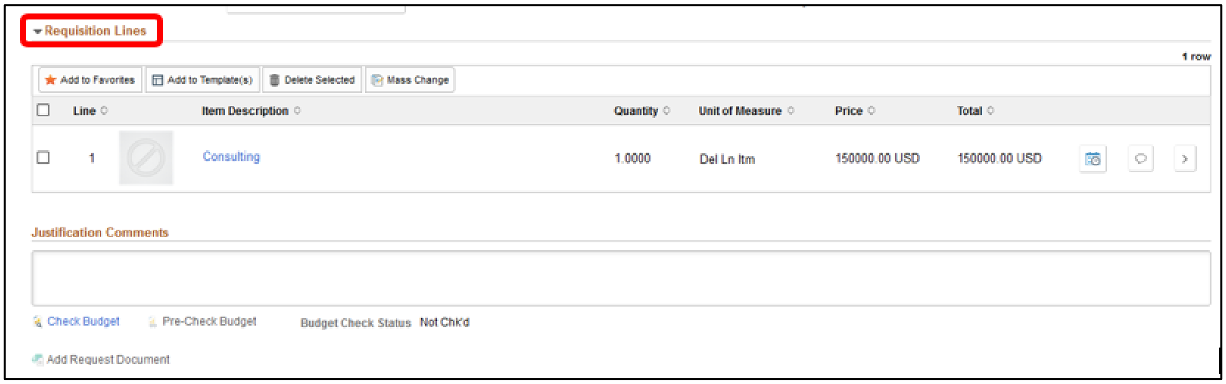


Lesson 1: Create a Requisition

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.

a. The **ADD TO FAVORITES** button is available to add the selected lines to the favorites list for future use.
b. The **DELETE SELECTED** button deletes the selected requisition lines.
c. Once the requisition line is 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.

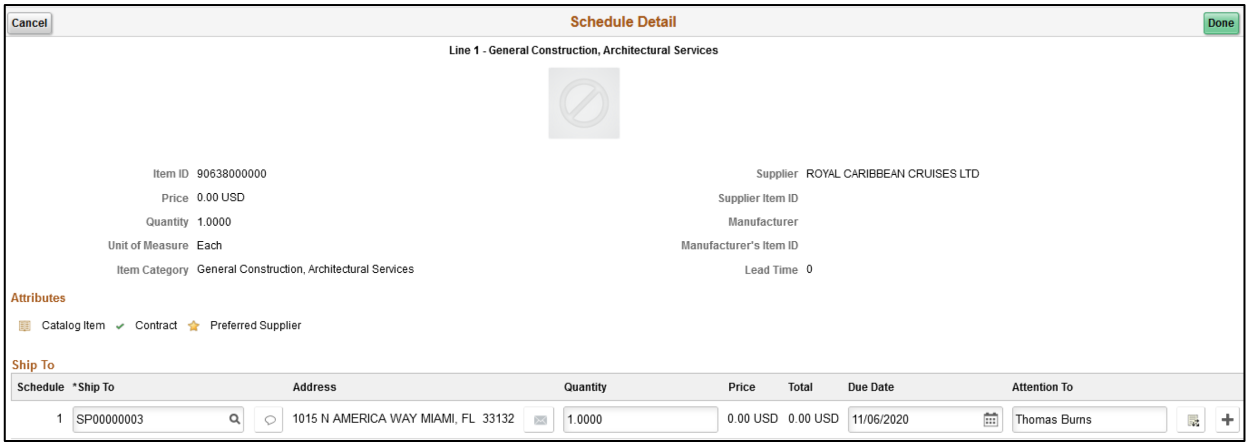
18. Review or update the **SHIP TO** field. This field designates where the goods were received from a supplier.

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.



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.

Lesson 1: Create a Requisition

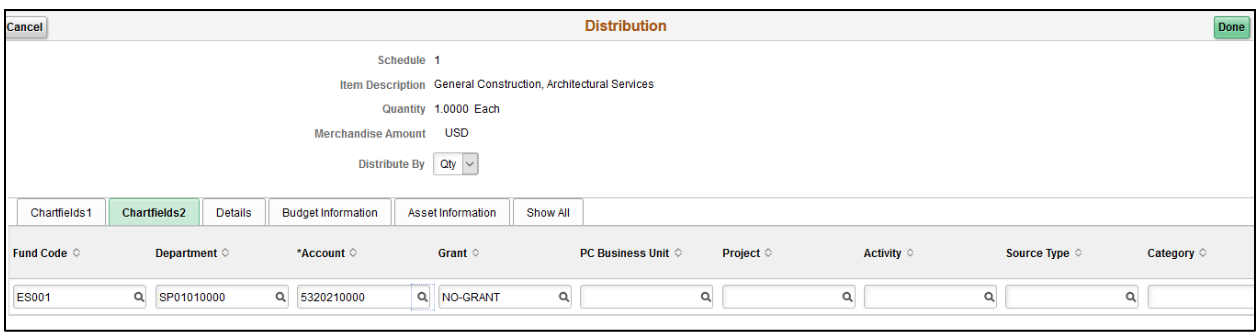
Lecture 2: Creating a Requisition from the Master Item Catalog

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.



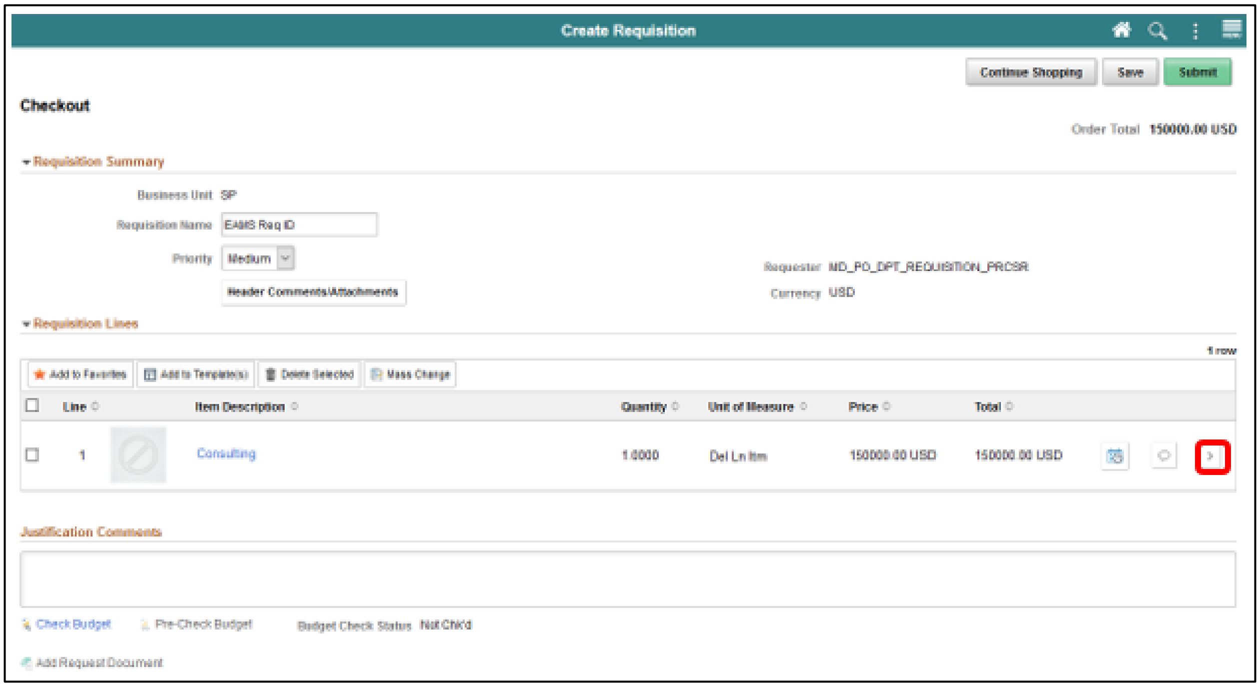
30. Select the **DONE** button when all the ChartField values have been selected. The system will then return to the Checkout page.

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.



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.

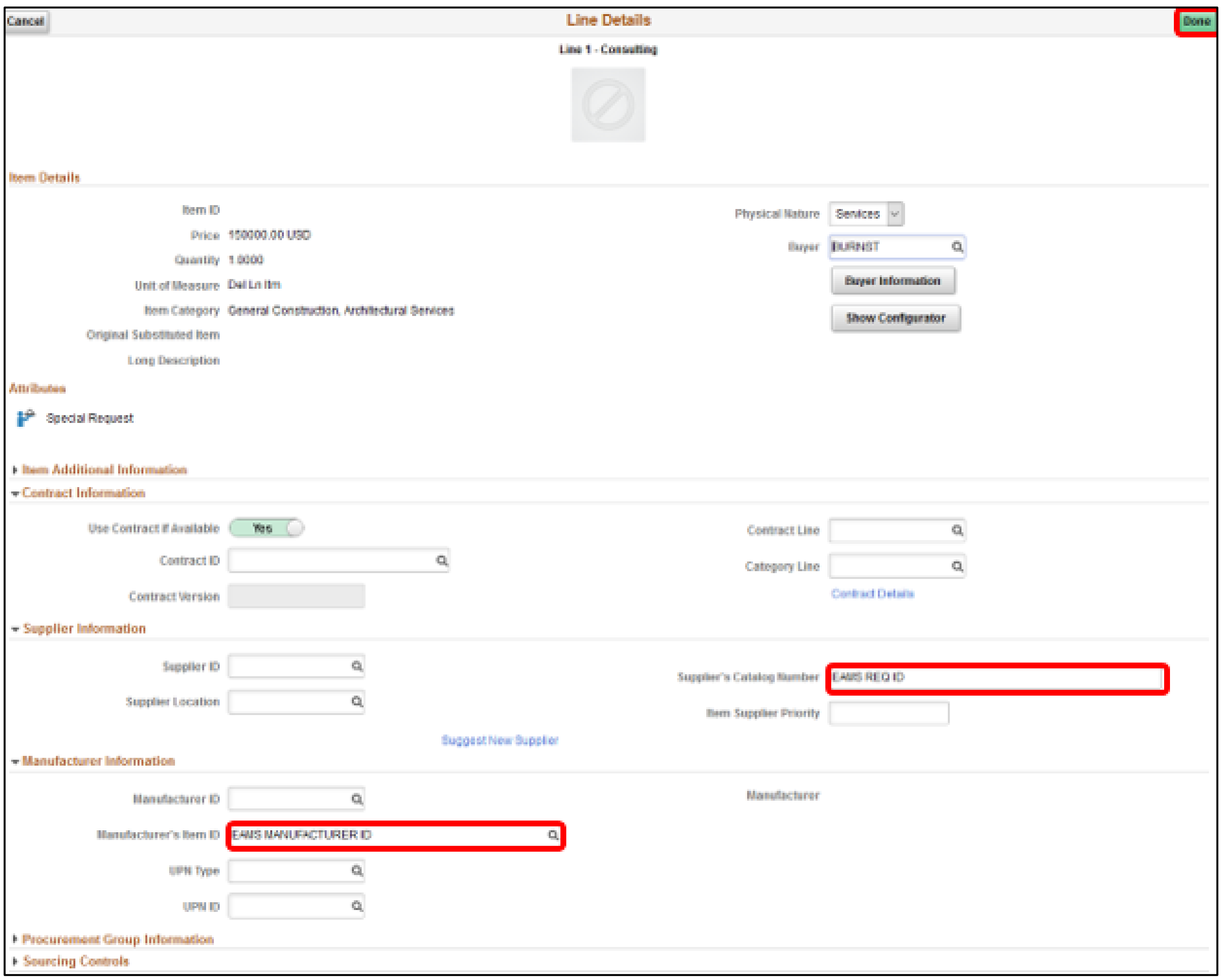
32. Enter the **SUPPLIER CATALOG NUMBER** value.

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.

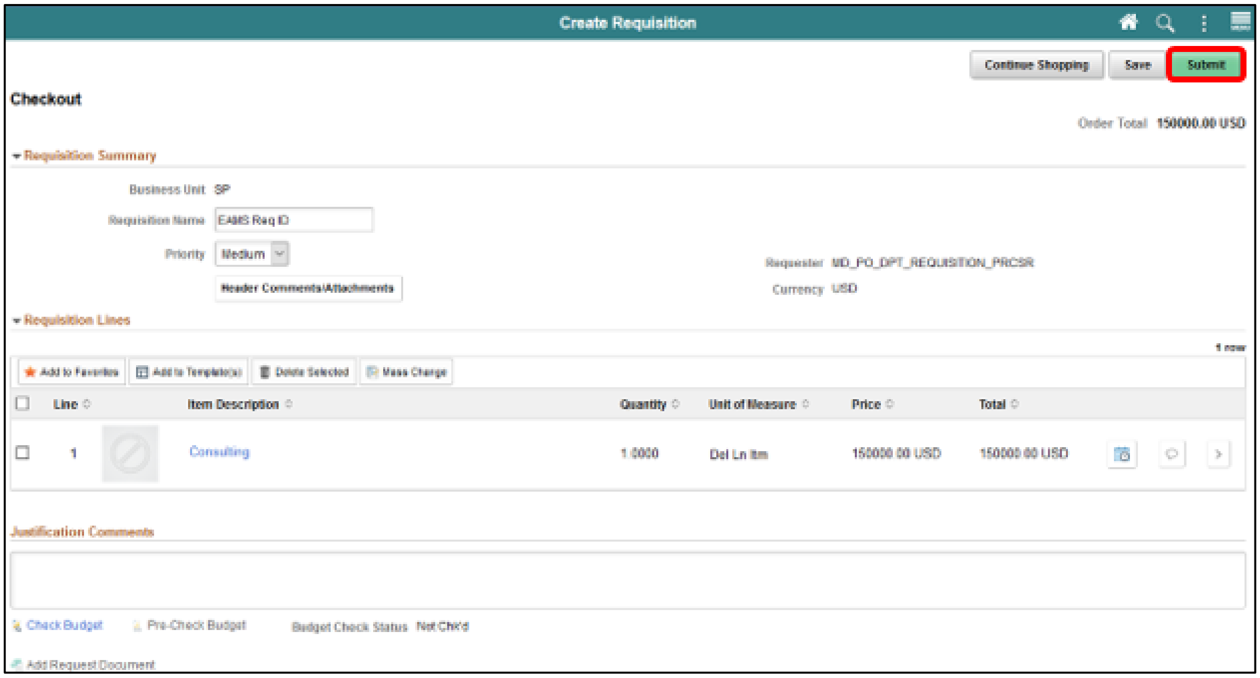
34. Select the **DONE** button when updates and relevant fields are verified. The system will then route to the Checkout page.



Lesson 1: Create a Requisition

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.



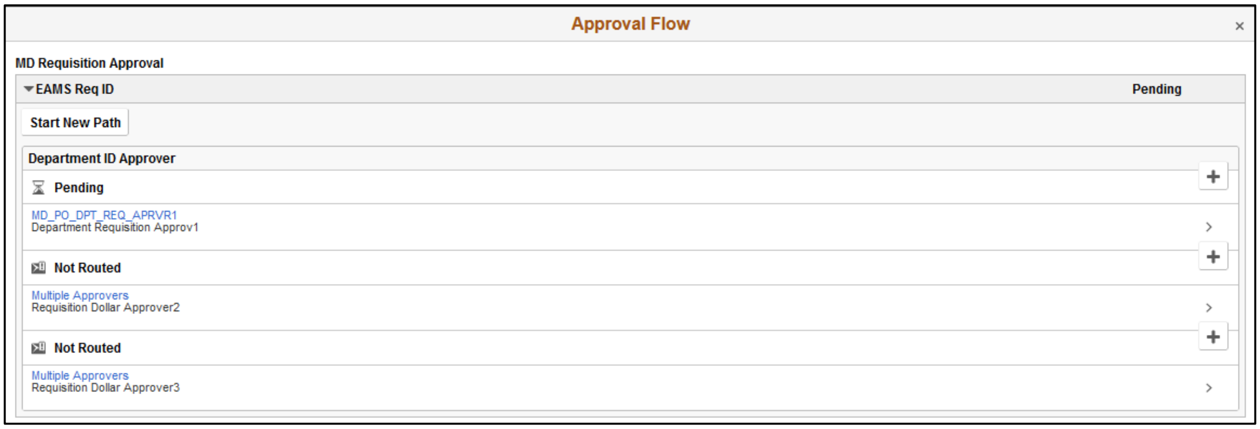
Save Confirmation Page: The Save confirmation page is intended to enable the requisitioner to view a summary of the final requisition. Also, it provides access to preview the approval workflow and to print the requisition.

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

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).



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.

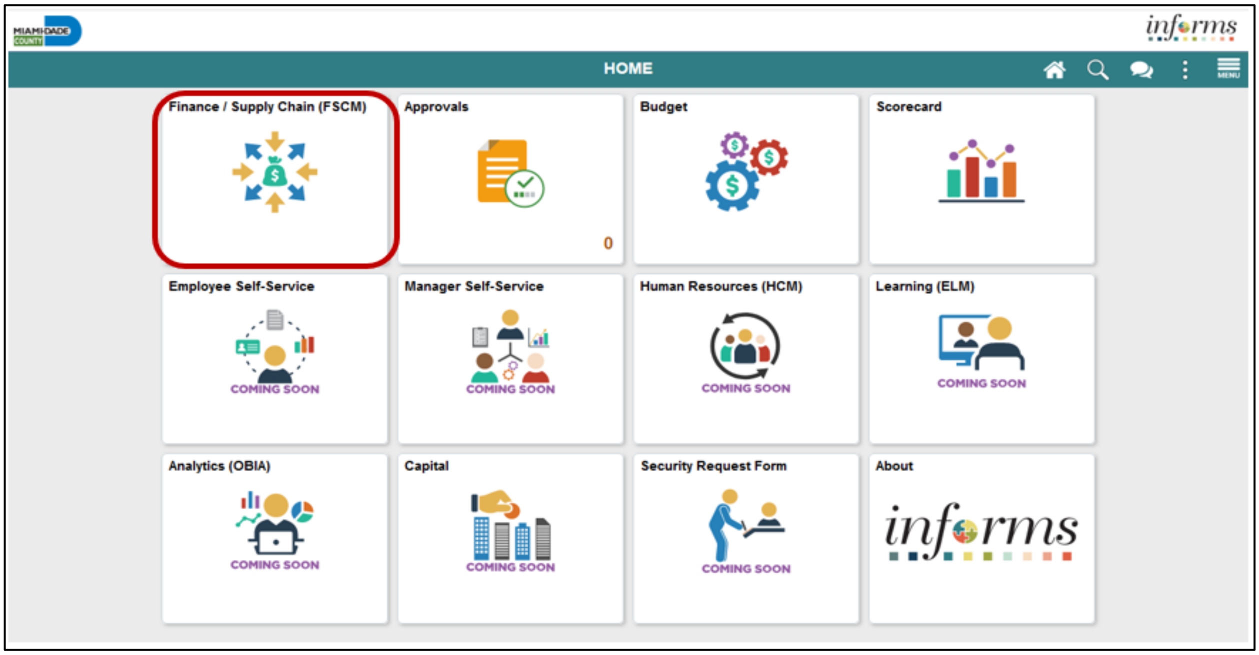
(True/False) The Schedule Page is used to review and modify schedule details for an item.

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***

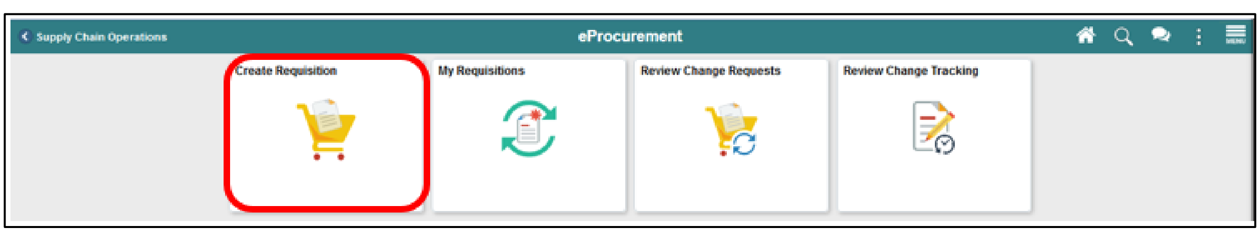
1. Login into **INFORMS** and select the **FINANCE/SUPPLY CHAIN (FSCM)** tile.



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:

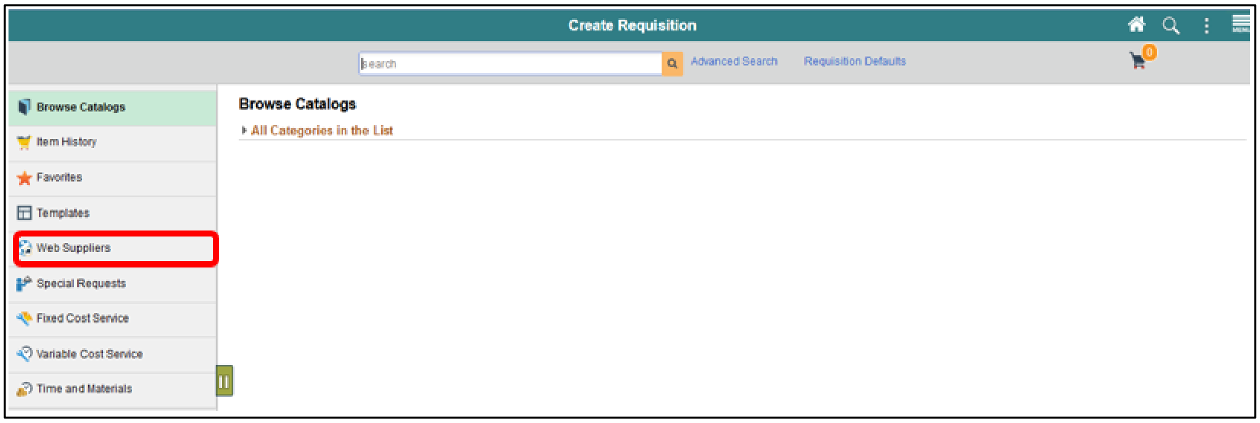
- The **HOME** button is used to return to the main page.
- The **SEARCH** button is used for a global search of the system.
- The **MENU** button is used to navigate throughout the system.
- The **SHOPPING CART** button is used to view the items selected and enter the desired quantity.
- The **VIEW 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.

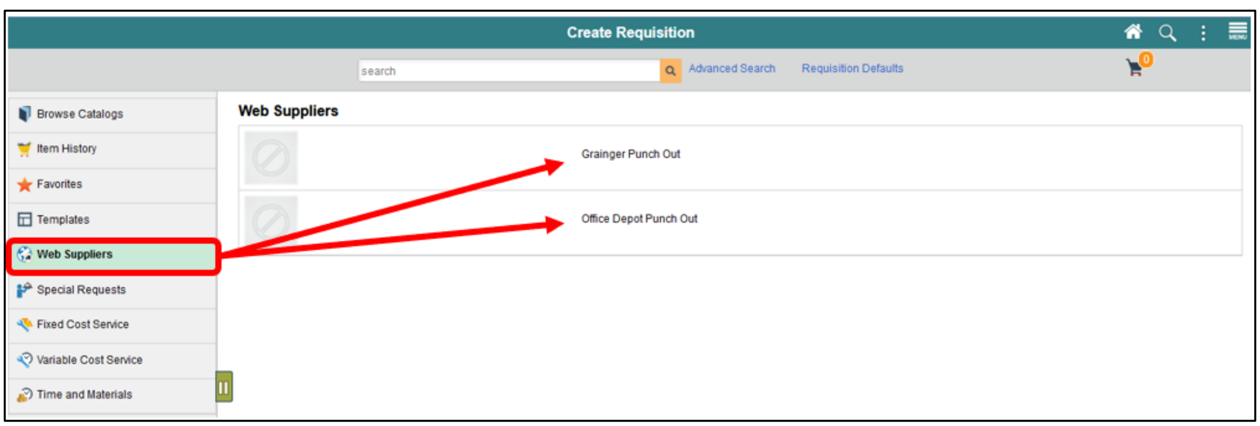
5. Select the **WEB SUPPLIERS** button to access the Web Supplier page.



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.



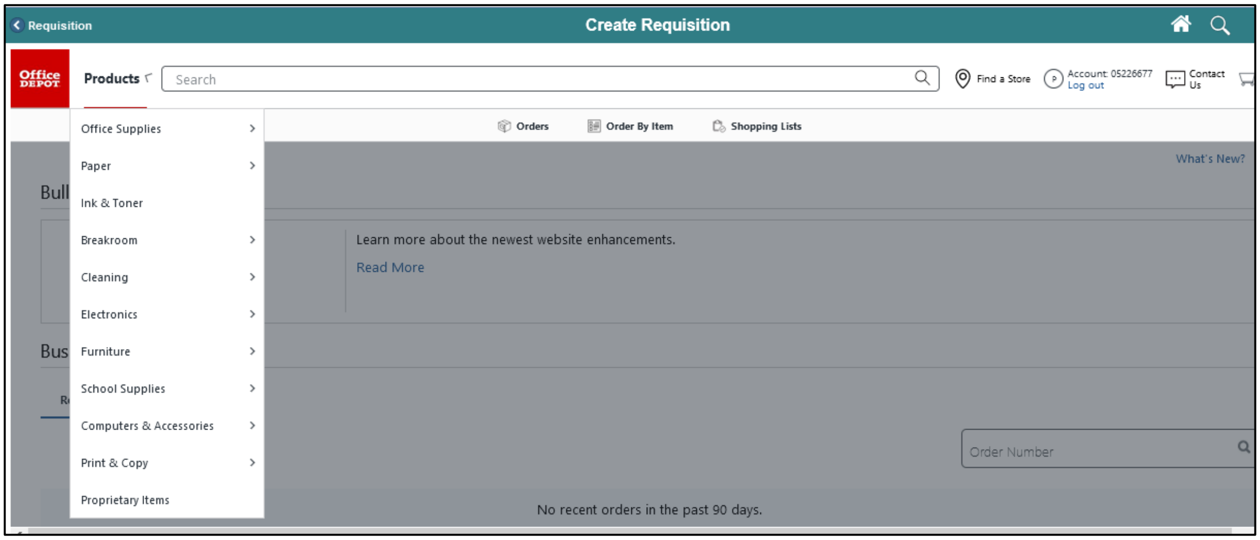
Lesson 1: Create a Requisition

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.

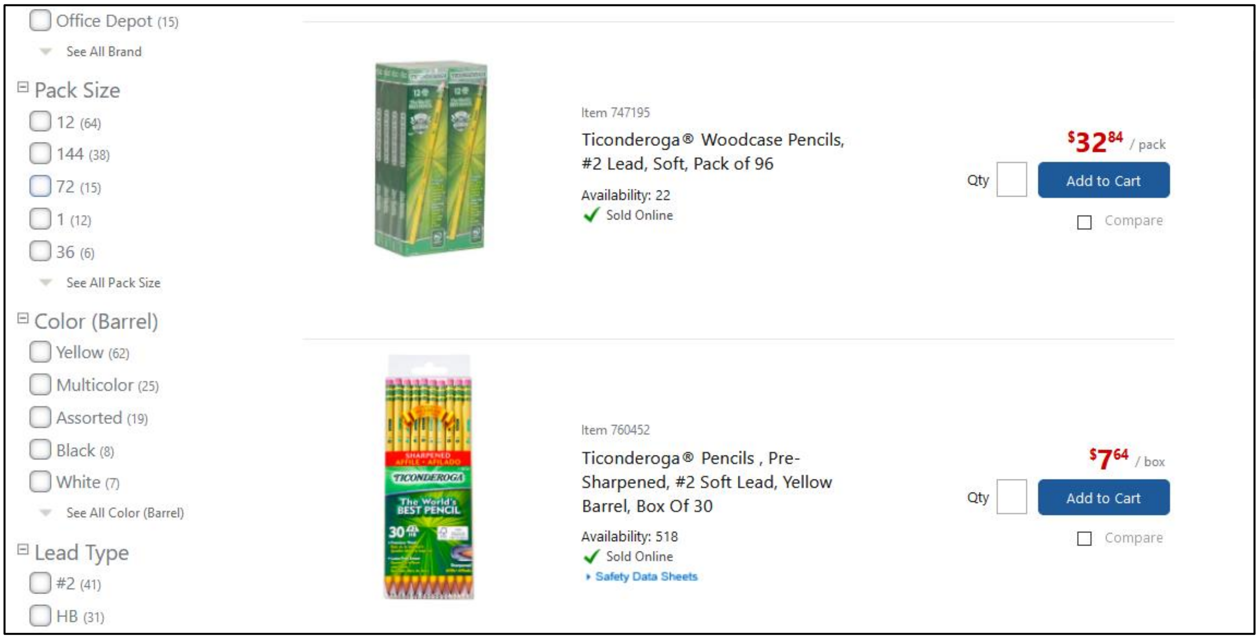
Lesson 1: Create a Requisition

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.

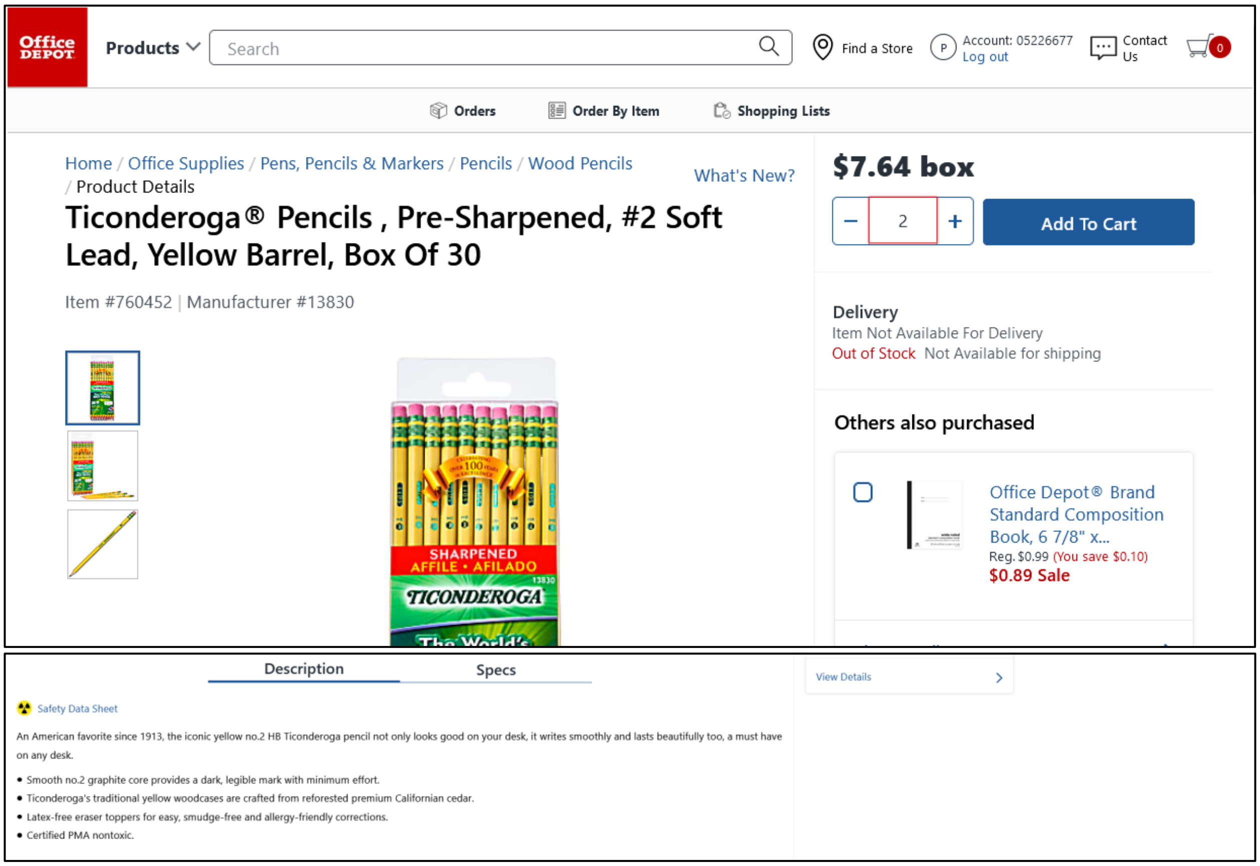


Lesson 1: Create a Requisition

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.



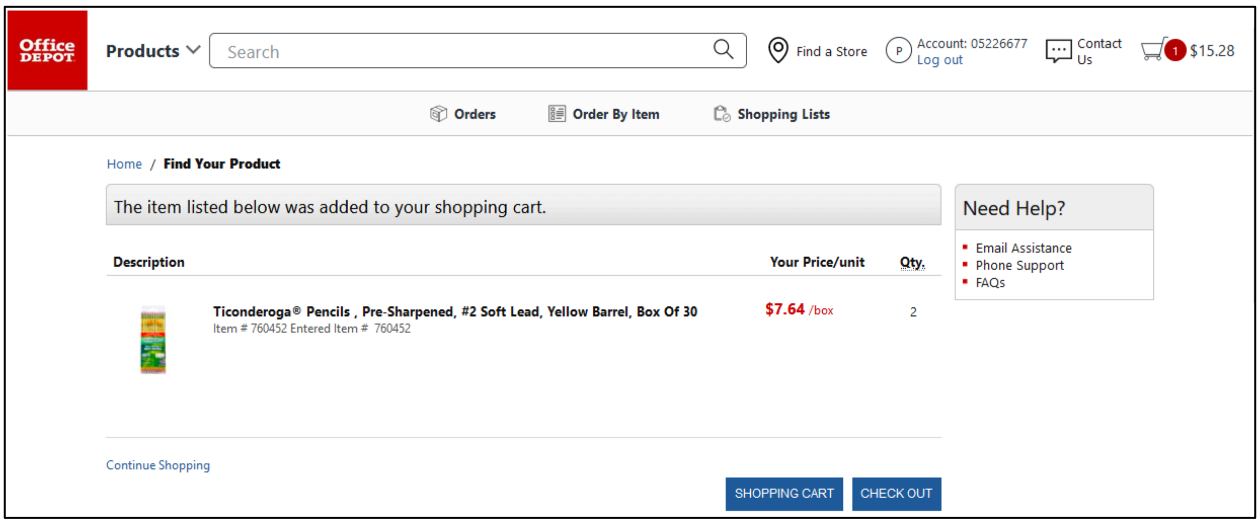
Lesson 1: Create a Requisition

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.



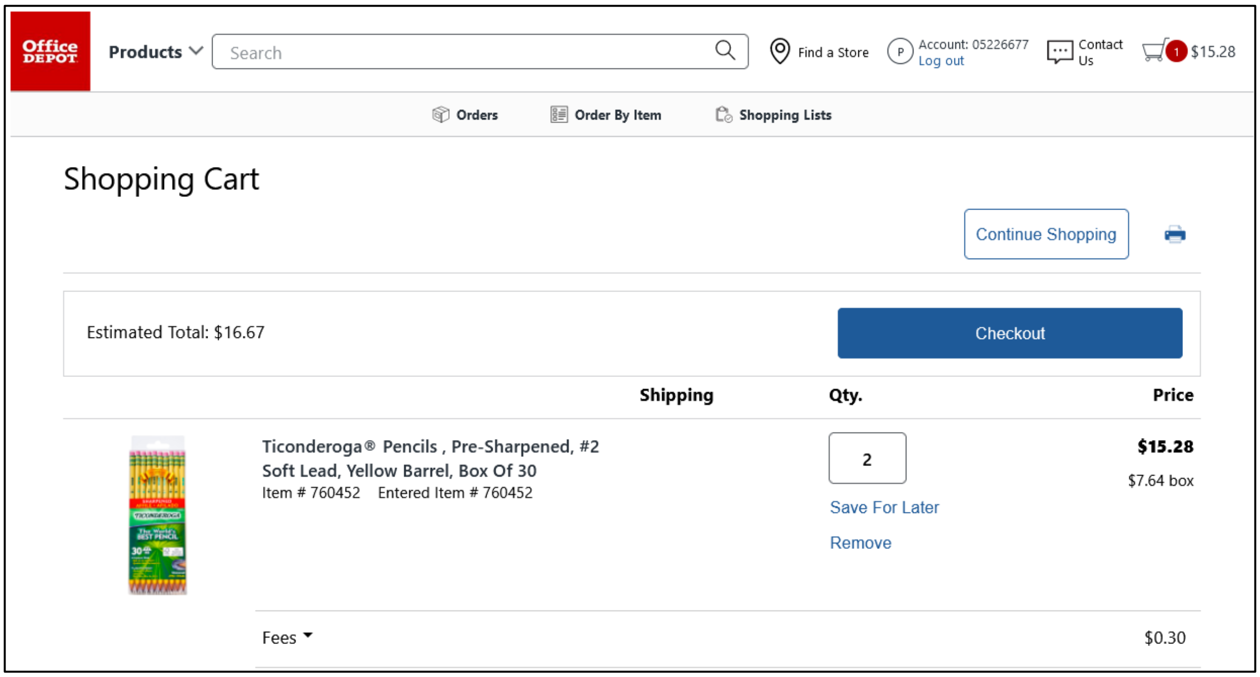
Lesson 1: Create a Requisition

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.



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).

Lesson 1: Create a Requisition

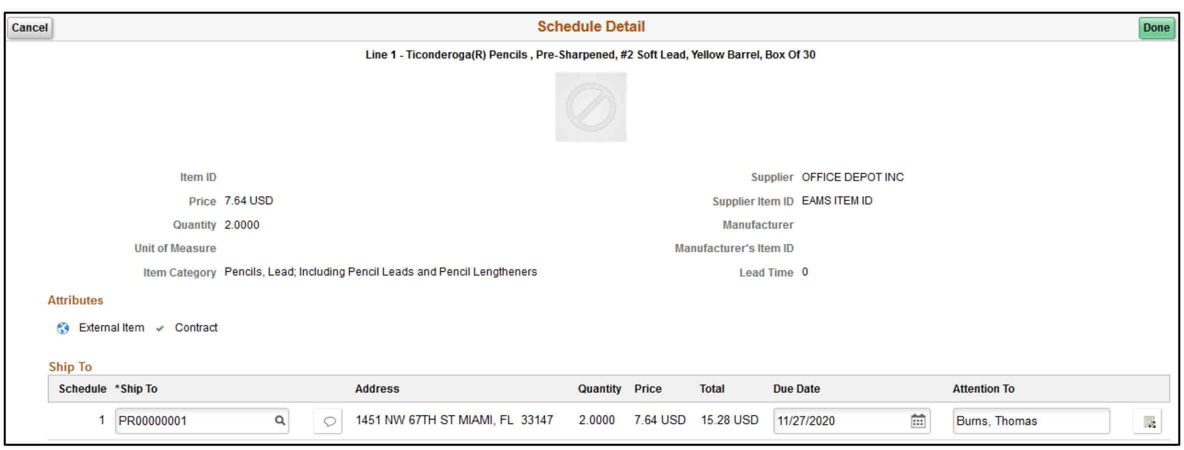
Lecture 3: Creating a Requisition from Web Suppliers

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.

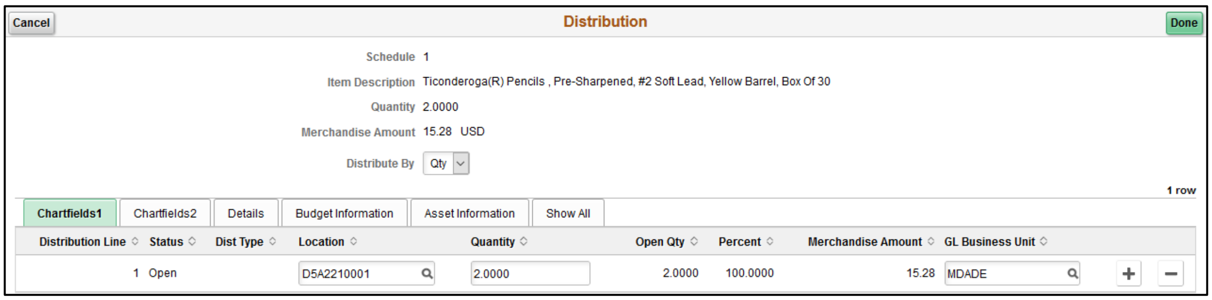


Lesson 1: Create a Requisition

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.



25. Enter a **FUND CODE** value.
26. Enter a **DEPARTMENT** value
27. Enter an **ACCOUNT** value
28. Enter a **GRANT** value.

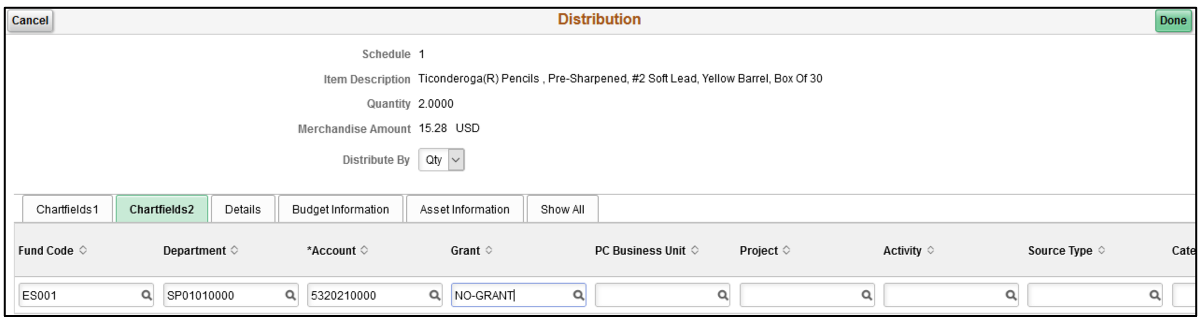
Note: A requisitioner must enter an actual grant value if this item is expensed to an active grant. If not, the "**NO-GRANT**" value must be selected.

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.

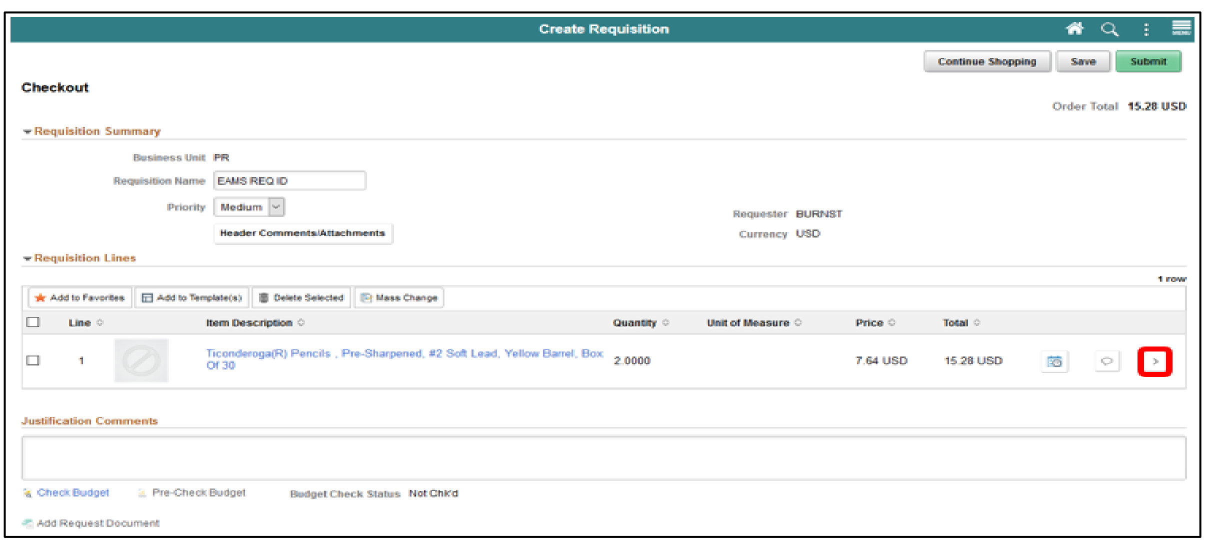
29. Enter a **PC BUSINESS UNIT** value. This field should reflect the Business Unit of the requestor.
30. Enter a **PROJECT** value. This value is created in the Project Costing module.
31. Enter an **ACTIVITY** value. The activity value represents a subtask in project costing (i.e., Planning, Design).
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.

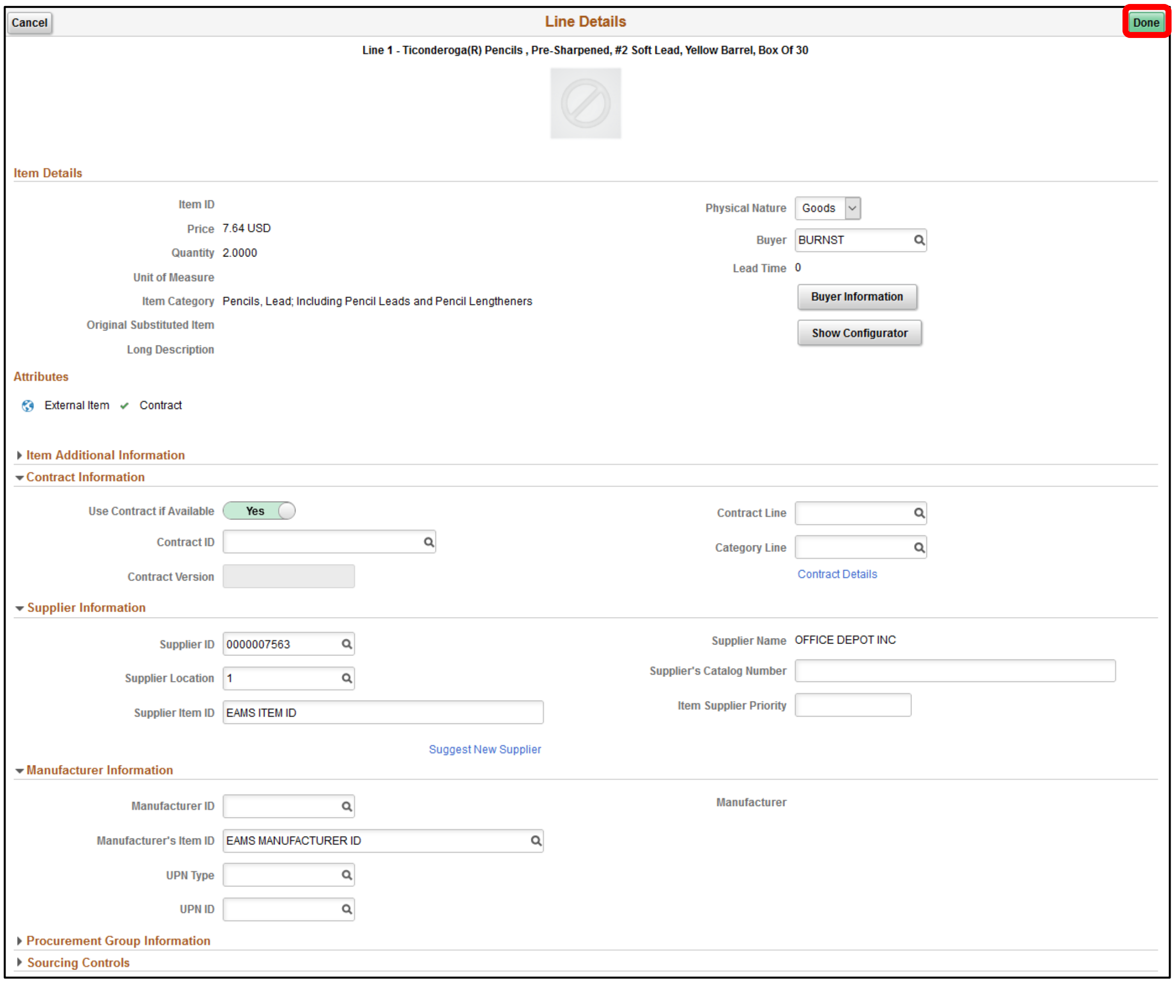


Lesson 1: Create a Requisition

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.

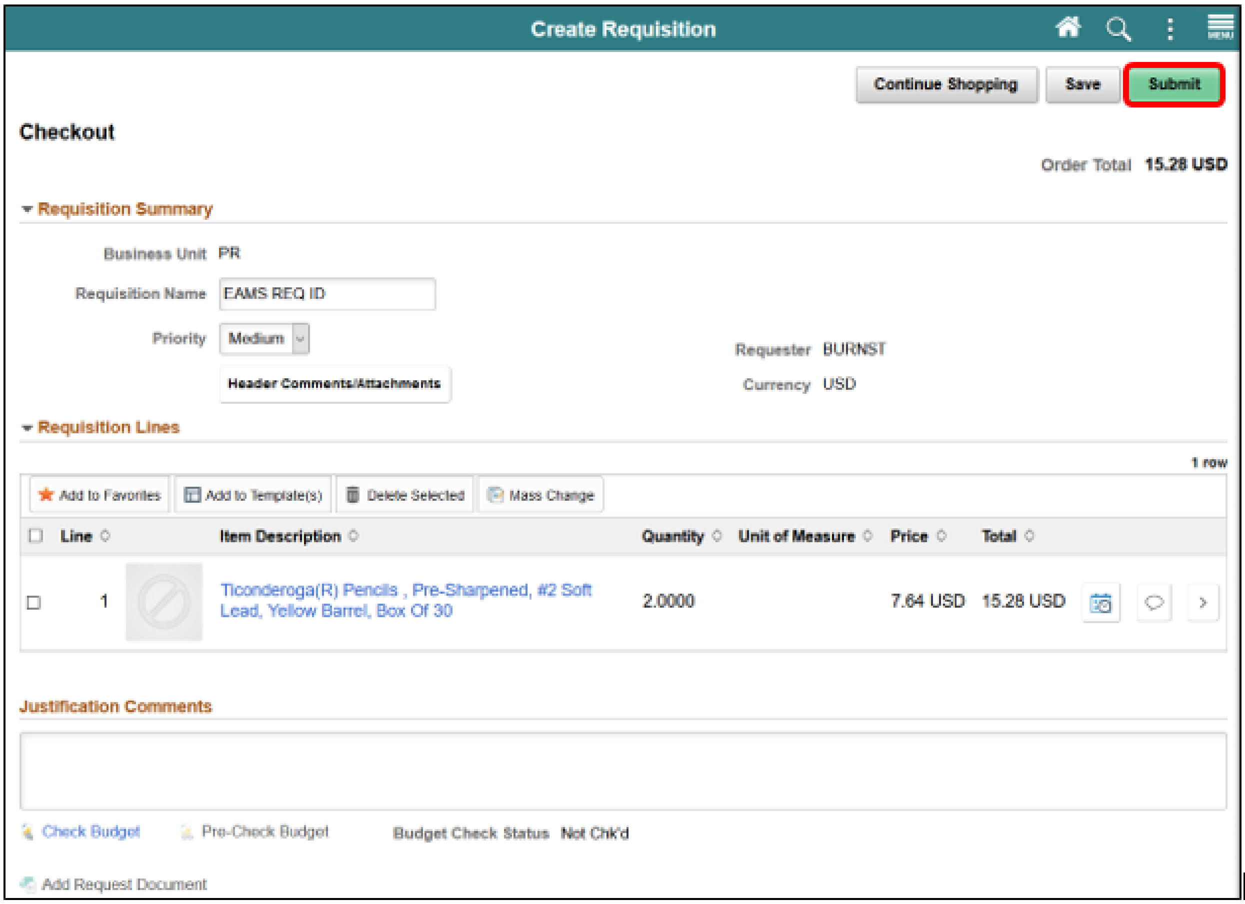


Lesson 1: Create a Requisition

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.



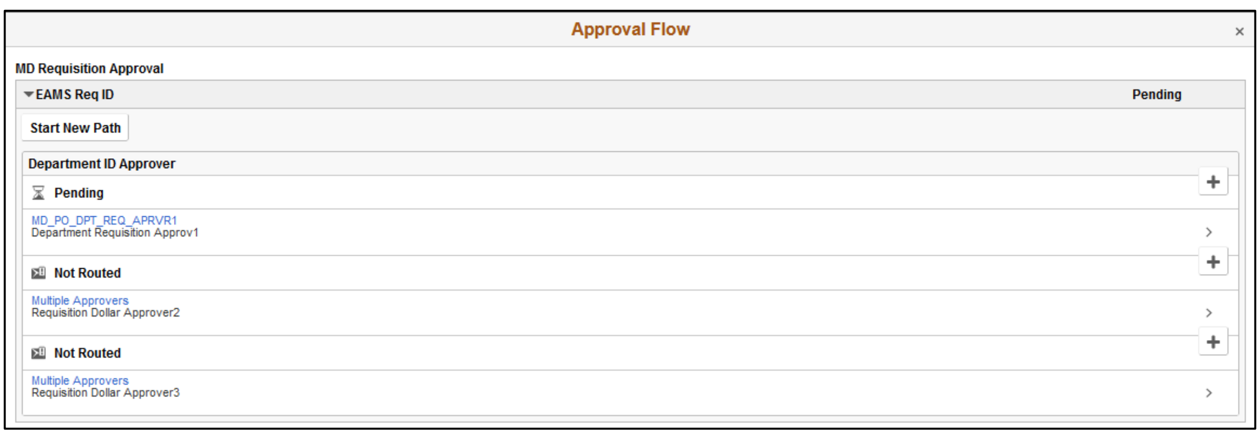
Lesson 1: Create a Requisition

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.

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).



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?

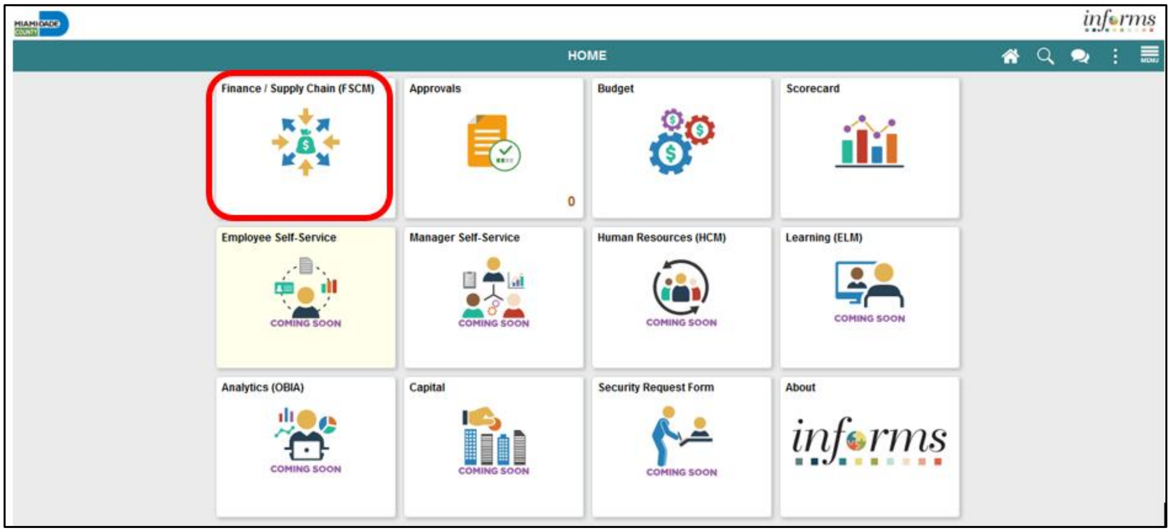
(True/False) the web supplier checkout page is where you will submit for approval all items selected from the web supplier catalog.

Lesson 1: Create a Requisition

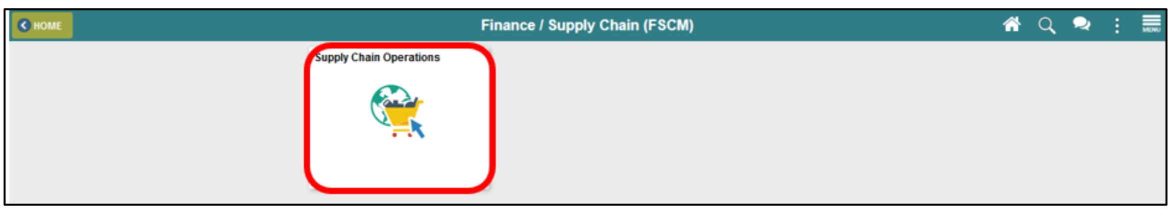
Lecture 4: Creating a Special Request

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

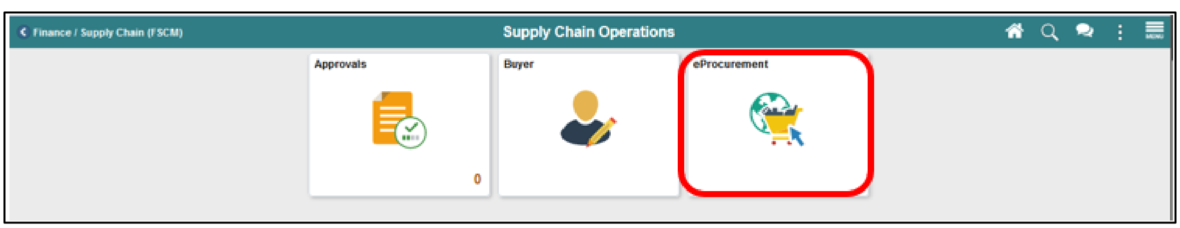
1. Login into **INFORMS** and select the **FINANCE/SUPPLY CHAIN (FSCM)** tile.



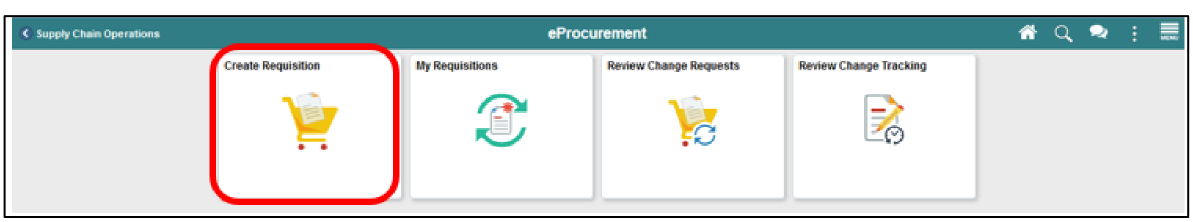
2. Select the **SUPPLY CHAIN OPERATION** tile.



3. Select the **Eprocurement** tile.



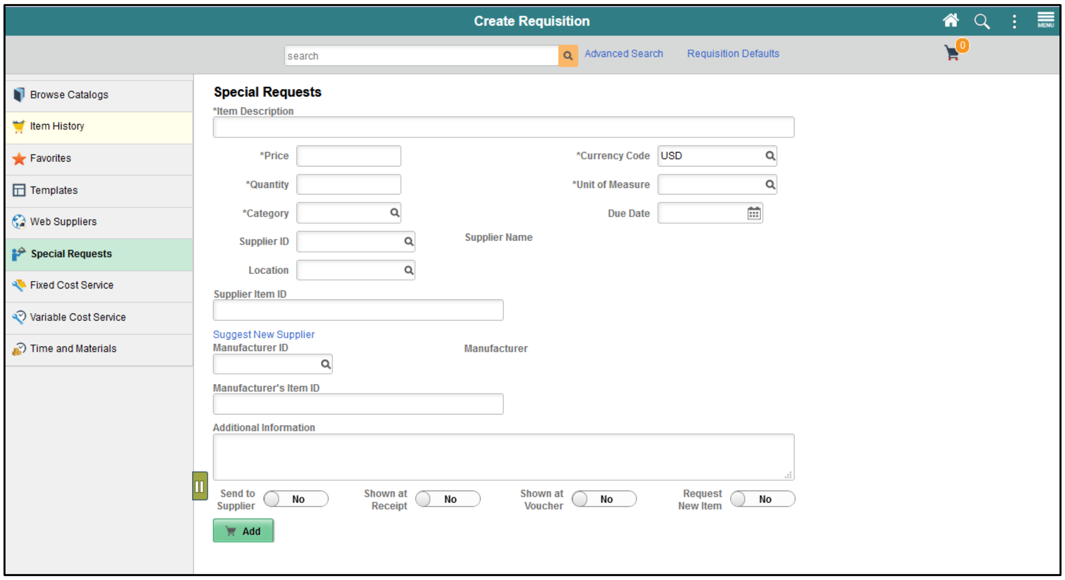
4. Select the **CREATE REQUISITION** tile.



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.



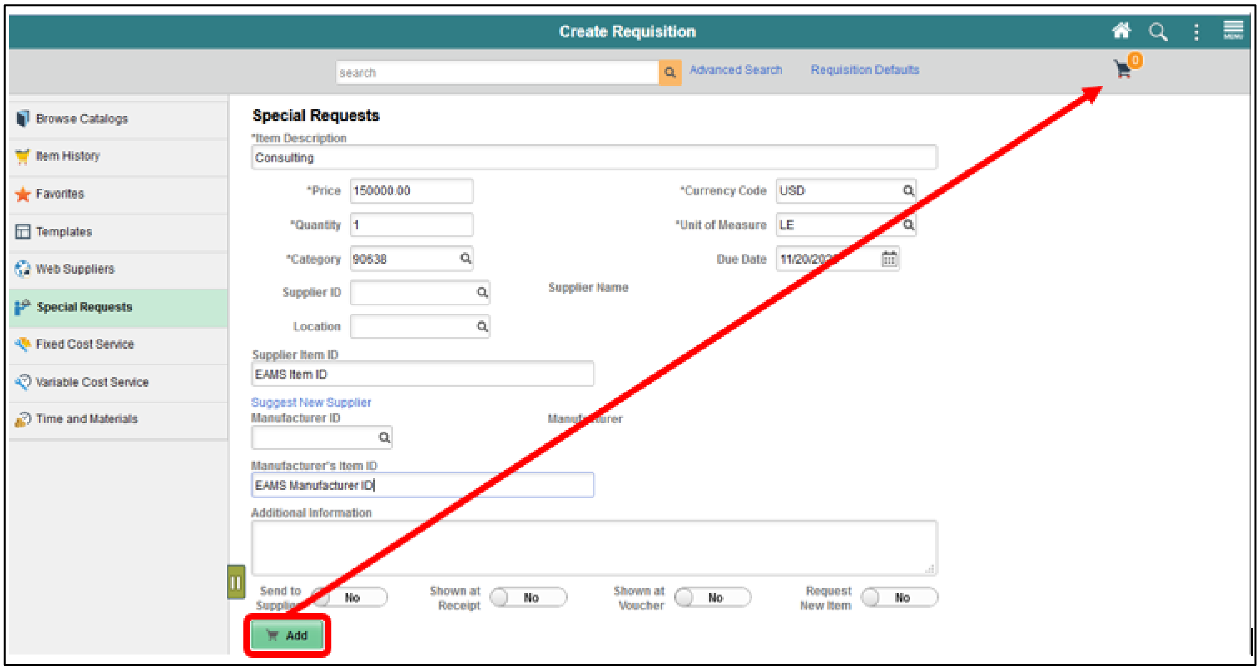
Common fields used in a special request:

- **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.



Lesson 1: Create a Requisition

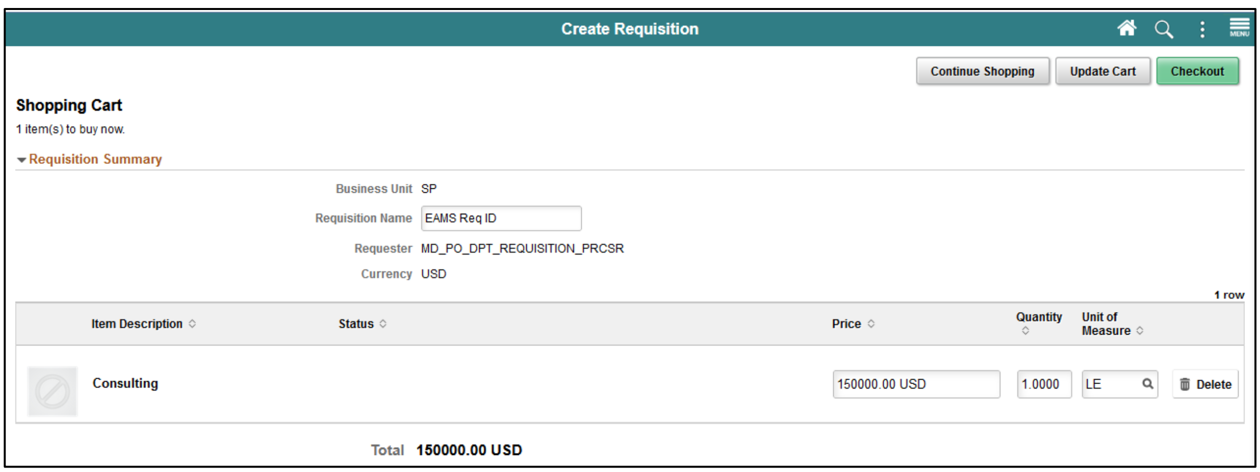
Lecture 4: Creating a Special Request

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.



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:

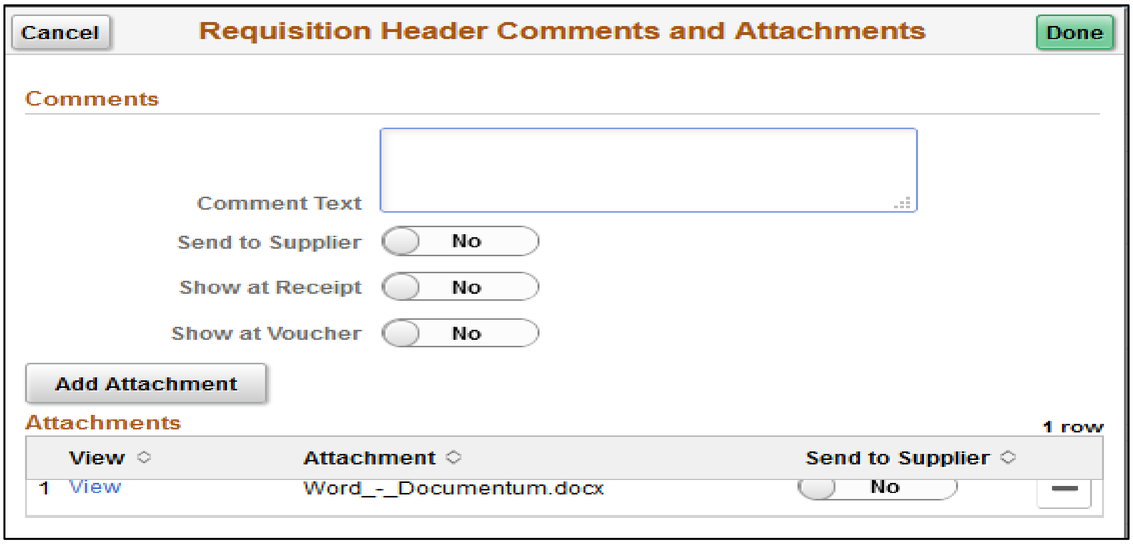
7. Verify or update the **REQUISITION NAME** field to reflect a description that makes it easier for the approver to identify. If the field is left blank, the system will use the Requisition ID as the name. **IMPORTANT!** Several departments will use this field (e.g., Transit) to reflect the ***EAMS 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).

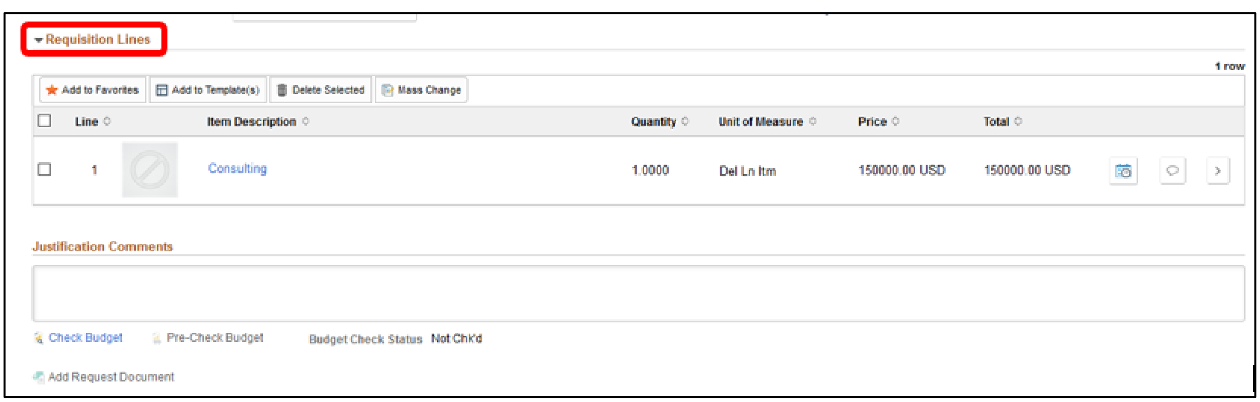
IMPORTANT! This functionality is essential when the item is not in the item catalog. The requisitioner should include all market research (pictures, specifications, scope-of-work) associated with the item. The Buyer or Procurement Officer will leverage this information for the creation of a sourcing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



The ***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.



Lesson 1: Create a Requisition

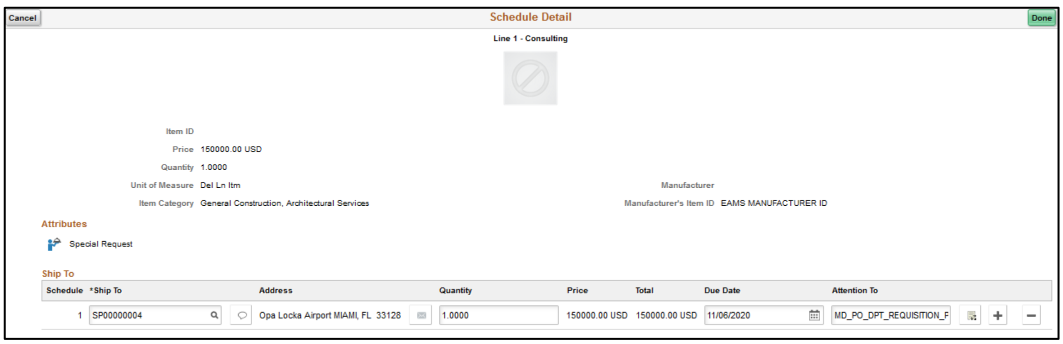
Lecture 4: Creating a Special Request

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.

10. 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.

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

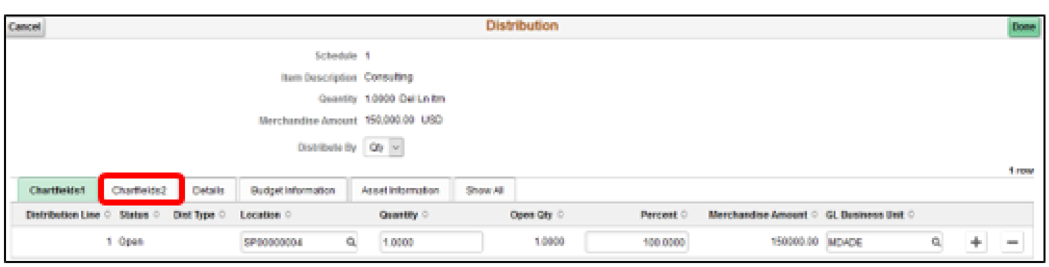


Distribution Page: The Distribution Page is the fourth layer of a requisition used to enter accounting information (ChartFields). There are several tabs on this page, but we will only concentrate on the **CHARTFIELDS 1** and **CHARTFIELDS 2** tabs.

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.

13. Select the **CHARTFIELD2** tab.



Lesson 1: Create a Requisition

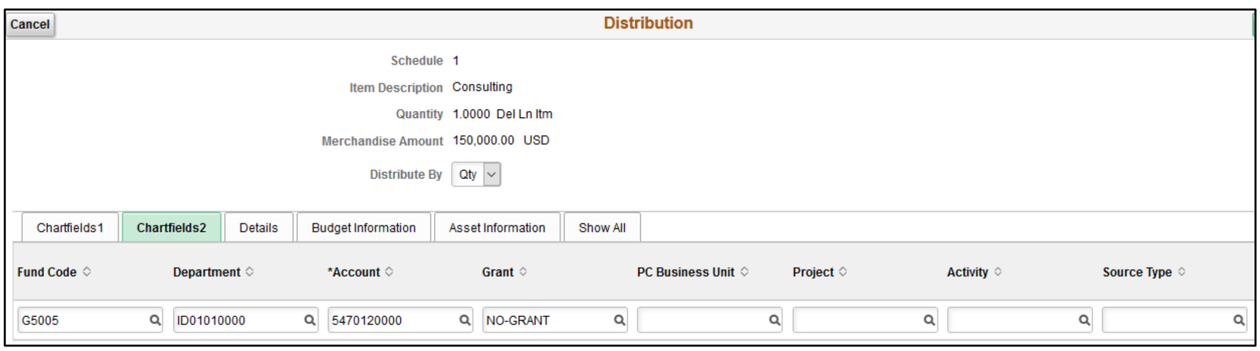
Lecture 4: Creating a Special Request

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.



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

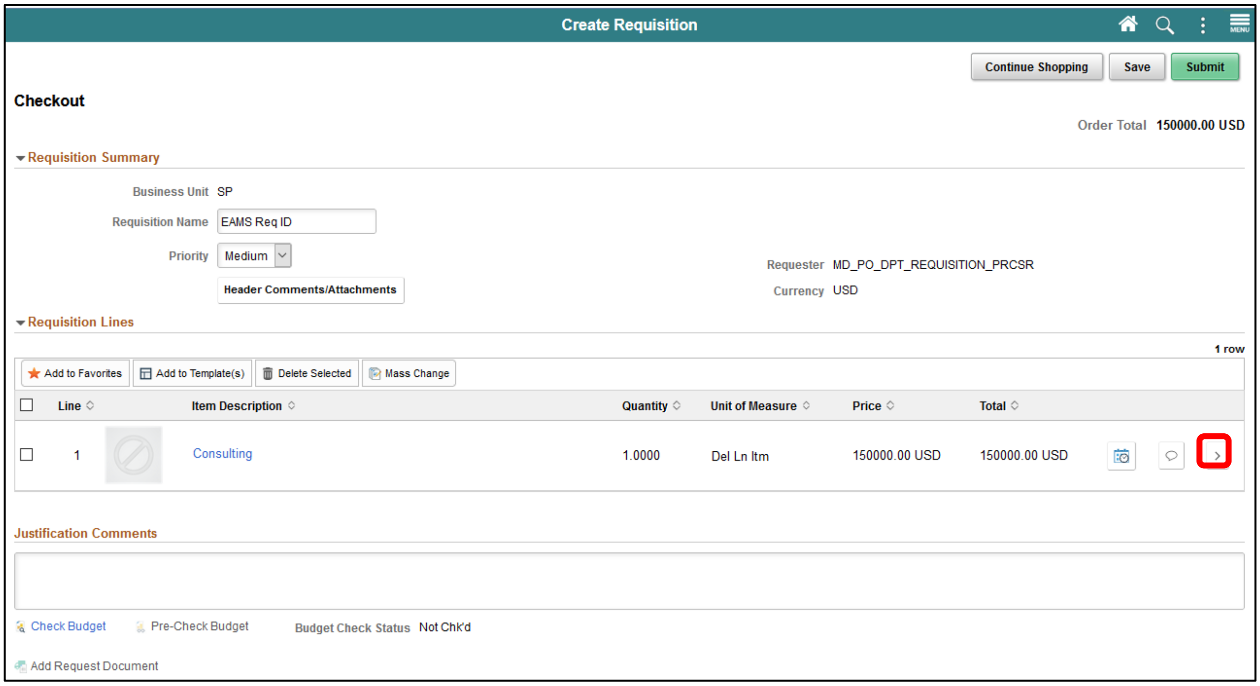
The system will then return to the Checkout page.

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.



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.

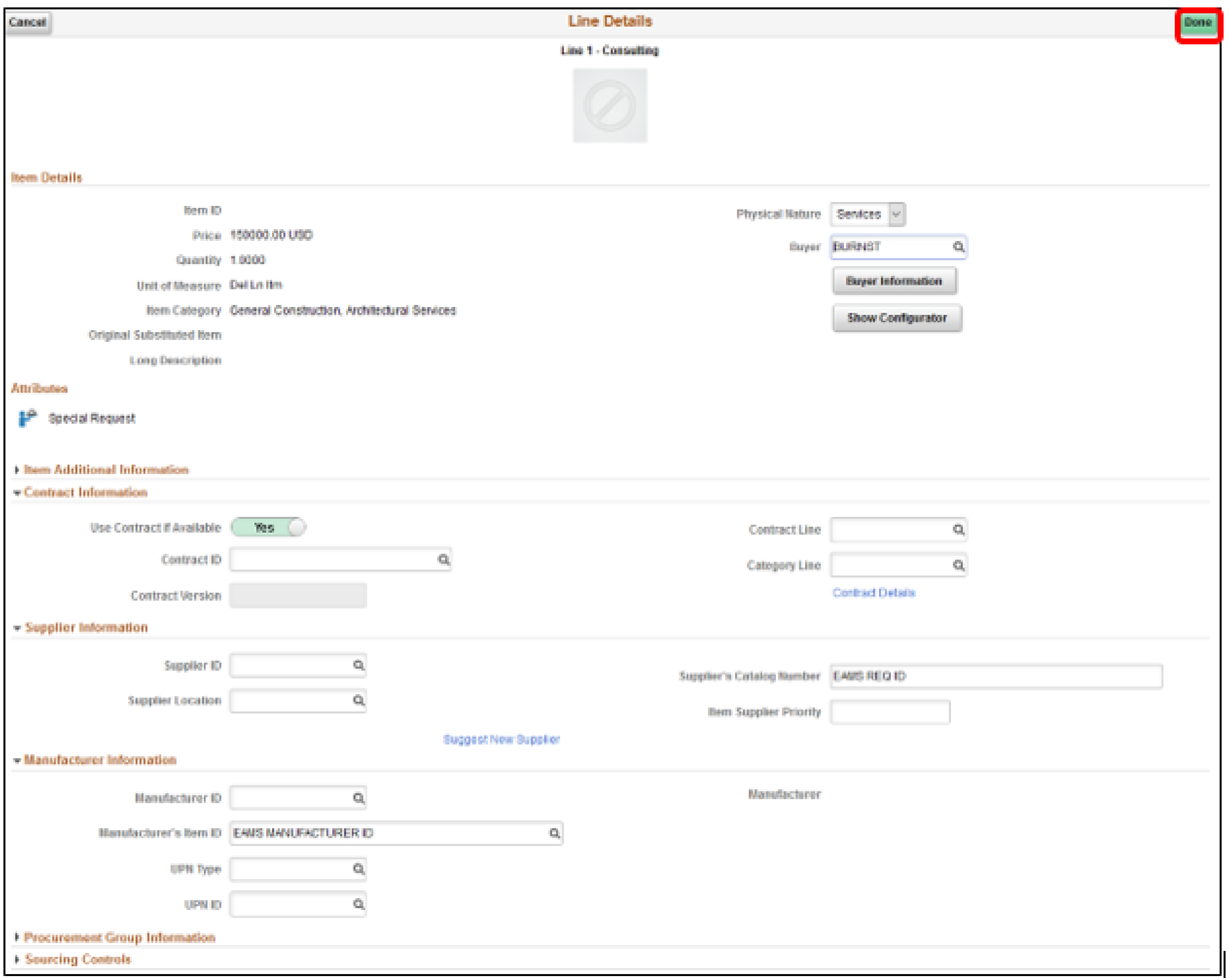
IMPORTANT! Several departments will use this field (e.g., Transit) to reflect the ***EAMS Requisition ID***. This field is a required field for the EAMS and INFORMS integration.

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.

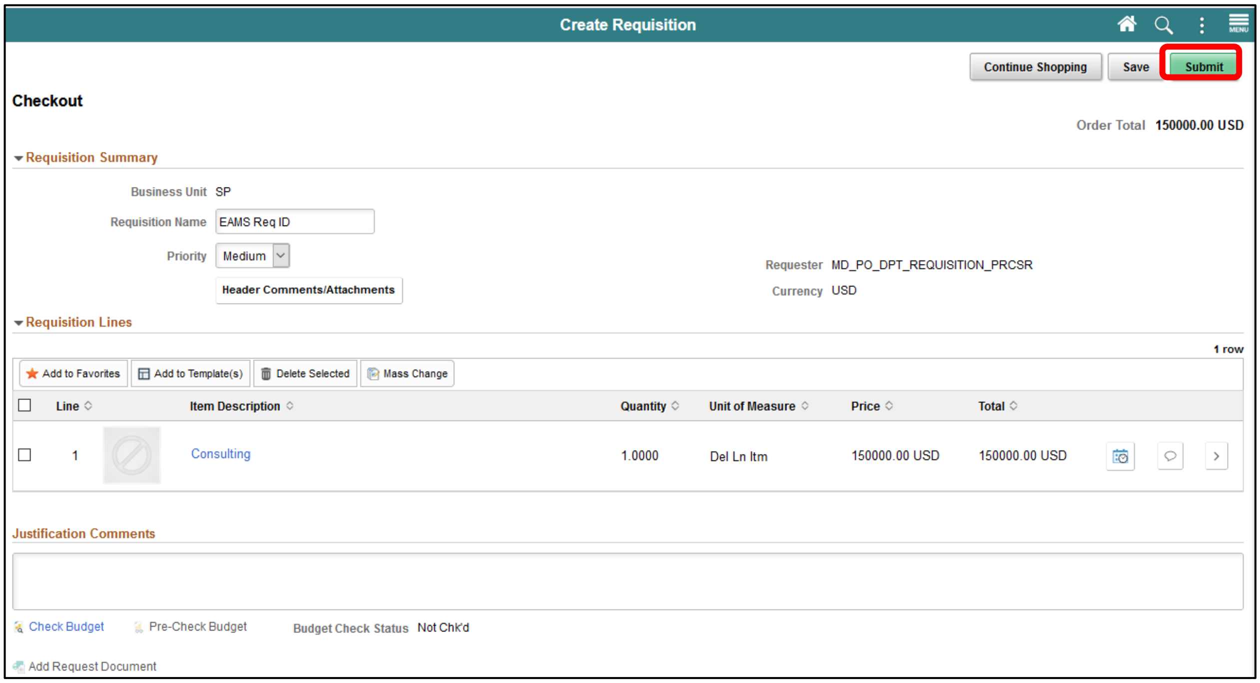


Lesson 1: Create a Requisition

Lecture 4: Creating a Special Request

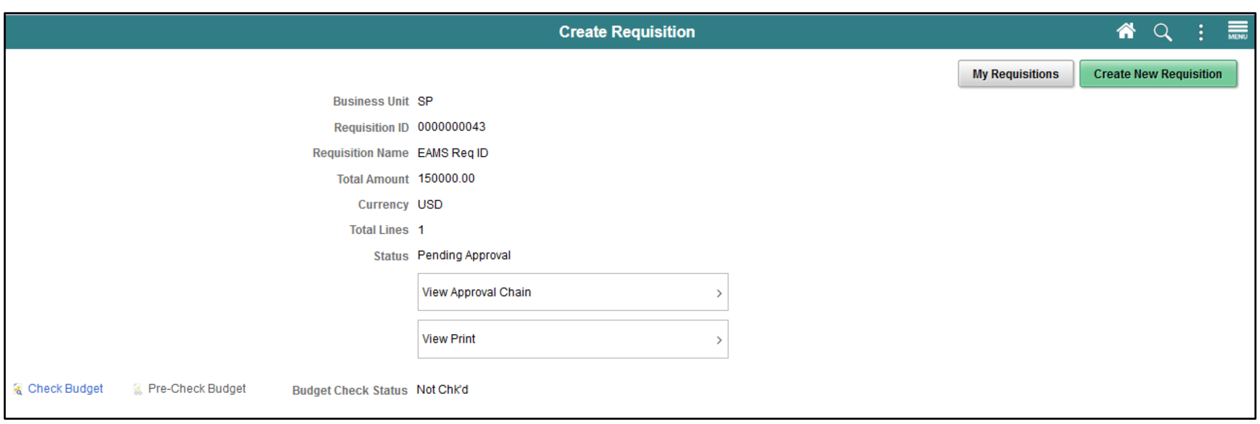
Note: Please make sure to follow the steps noted above for each requisition line. A requisition line requires an update to the ChartField values on the Distribution page before submitting the requisition for approval.

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



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.

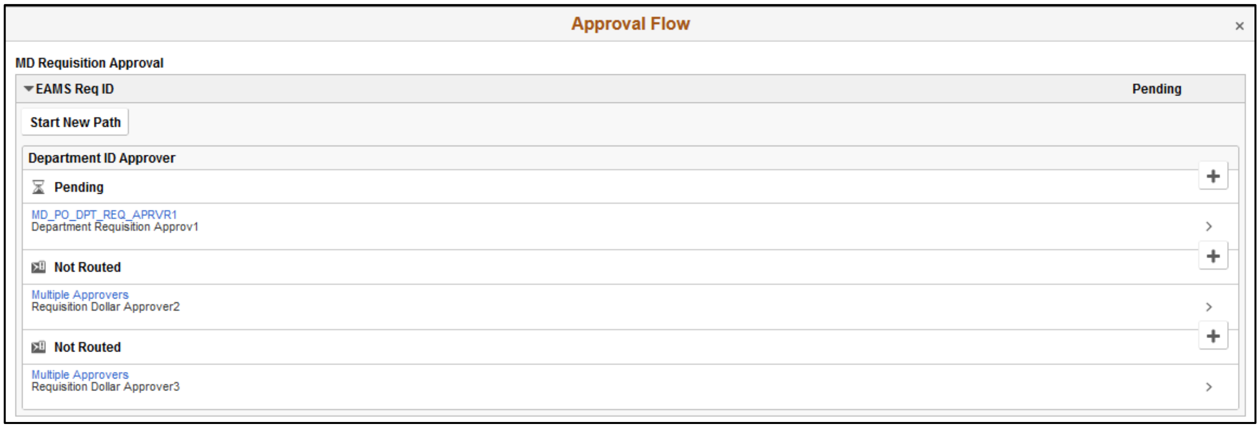
28. Select the **VIEW APPROVAL CHAIN** button to view the list of approvers for the requisition.



Lesson 1: Create a Requisition

Lecture 4: Creating a Special Request

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).



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.

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?

Lesson 1: Lesson Summary

Lesson Summary

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

- 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:

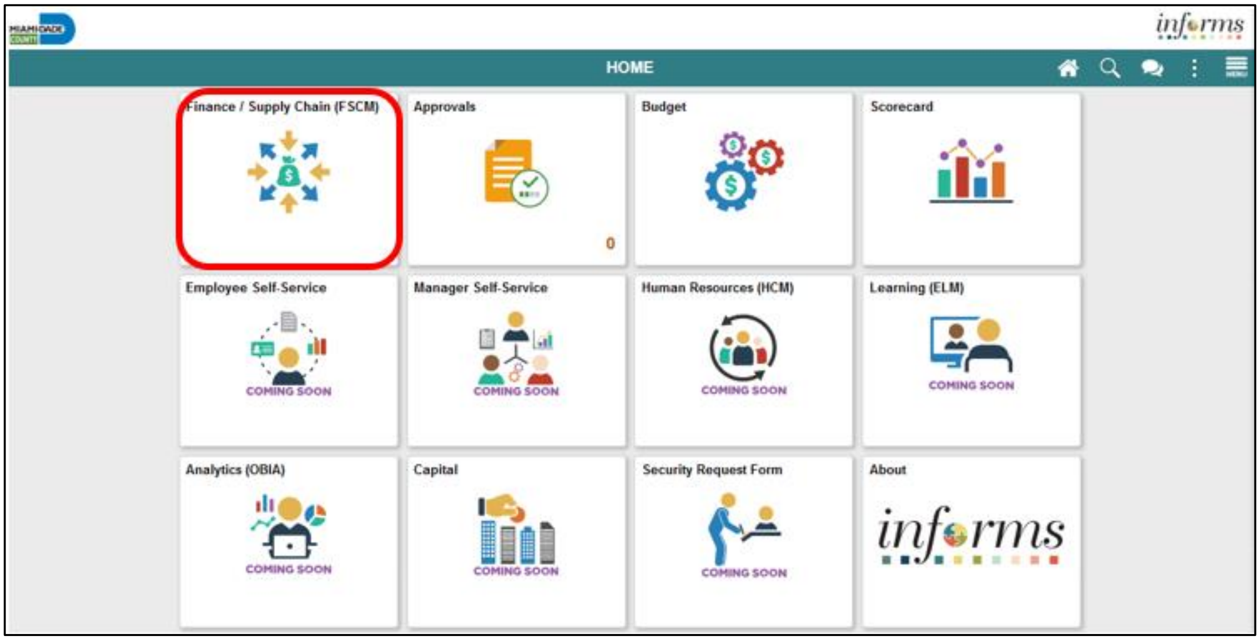
Term	Definition
Checkout Page	The last step before submitting the requisition for approval.
Distribution Page	The Distribution Page is the fourth layer of a requisition used to enter accounting information (ChartFields).
Edit Requisition Page	The Edit Requisition Page enables the requisitioner to make changes to the requisition.
My Requisitions Page	Used to view or take action on requisitions created by the requisitioner.
Requisition Lines section	Also known as the "Line," and the second layer of a requisition, the requisition lines section displays item details, adds functionality, and accesses the other requisition layers.
Requisition Summary	Also known as the "Header" and the first layer of a requisition, the Requisition Summary displays default values from the requisitioner's user profile (i.e., business unit, requestor, and currency).
Save Confirmation Page	The Save Confirmation Page is intended to enable the requisitioner to view a summary of the final requisition.
Schedule Detail Page	The Schedule Detail Page is the third layer of a requisition and it is used to review and modify schedule details for an item.
Shopping Cart Page	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 such results on the my requisitions page.
The **RELATED ACTIONS** button is used to display the available actions such as:

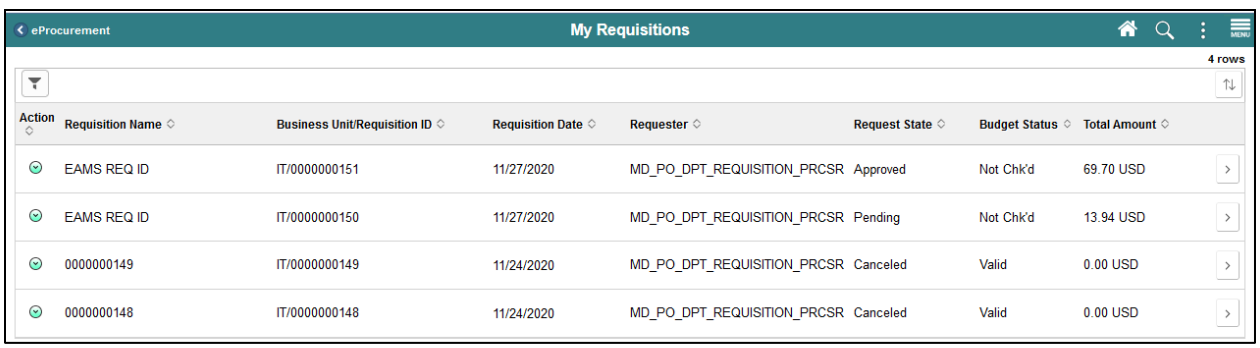
- Details
- Copy
- View Print
- Budget Check
- Edit

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

My Requisition Page: My requisitions page is used to view or take action on requisitions created by the requisitioner. The page 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.



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

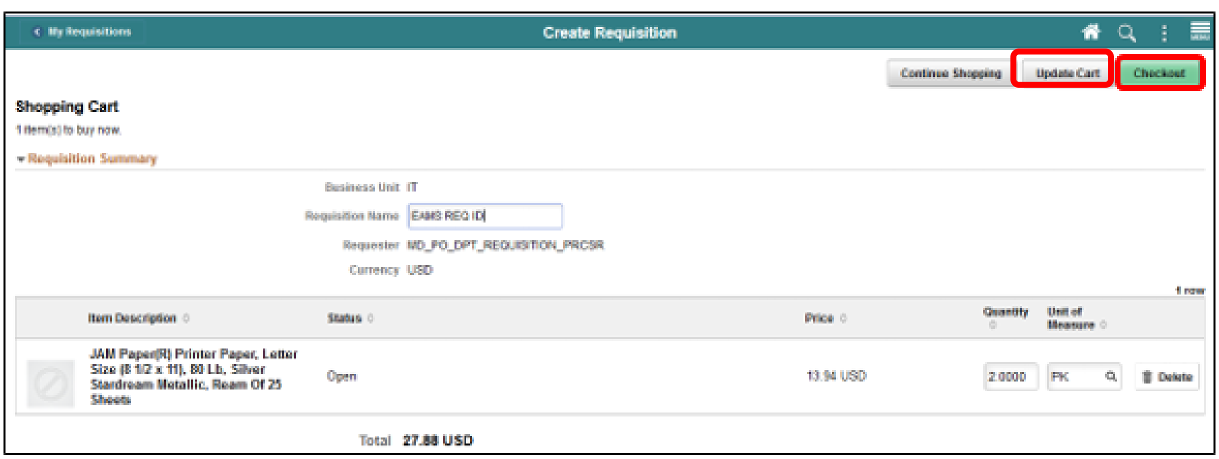
Lesson 1: Manage a Requisition

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.

7. 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***.
8. Update the **QUANTITY** field. This action will increase or decrease the number of items requested.
9. Select the **UNIT OF MEASURE** value. Usually, the unit of measure is static on most items. The requisitioner can select another value, but it may require further discussion with the buyer before the requisition is sourced.
10. Select the **DELETE** button. The action will delete the item selected from the shopping cart.
11. Select the **UPDATE CART** button. This action will save the changes and update the shopping cart.
12. Select the **CHECKOUT** button. This action will route the requisitioner to the checkout page.



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:

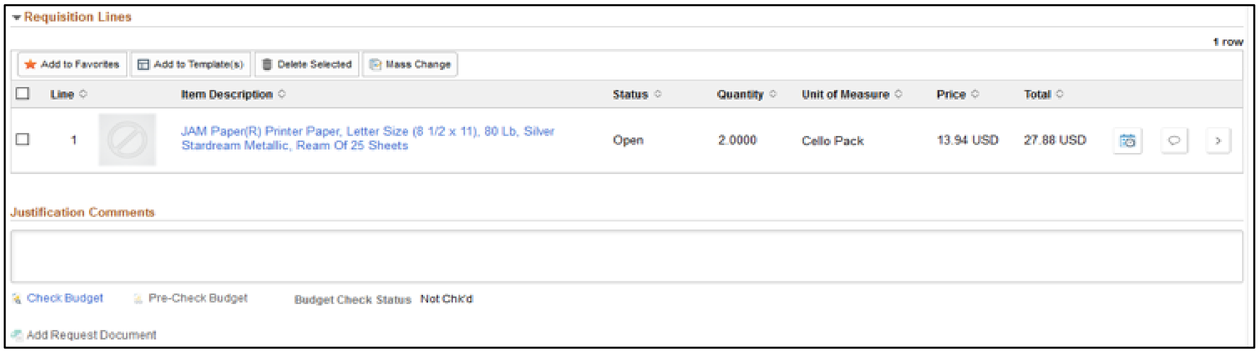
13. Verify the **REQUISITION NAME** field. The requisitioner should reflect a description that makes it easier for the approver to identify.
14. Select the **PRIORITY** value. The approver will have visibility to the priority field on the approver page.
    - Low
    - Medium (system default)
    - High
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.

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.

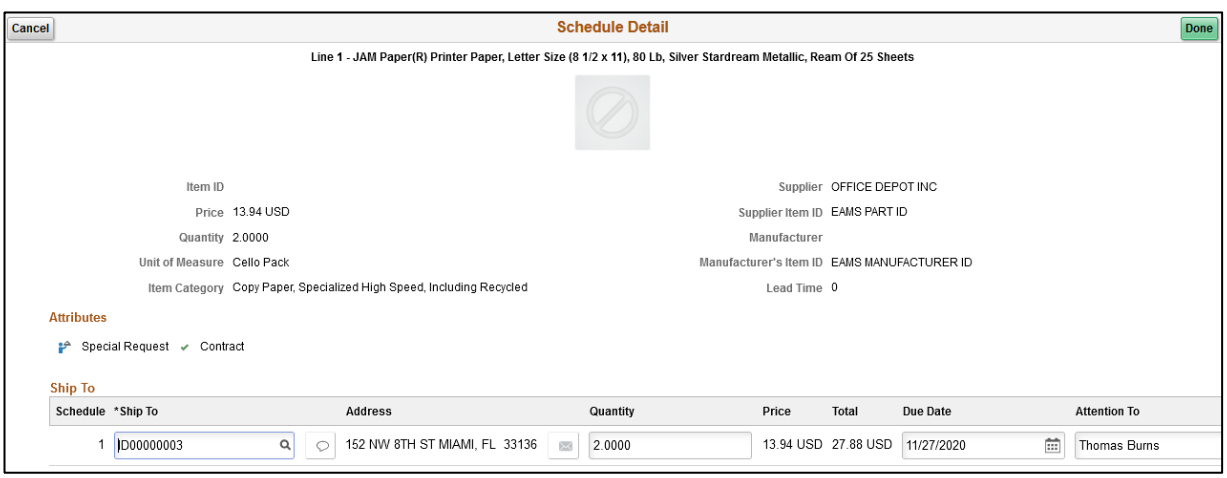


Schedule Detail Page: The Schedule Page is the third layer of a requisition, and it is used to review or modify schedule details for an item.

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.

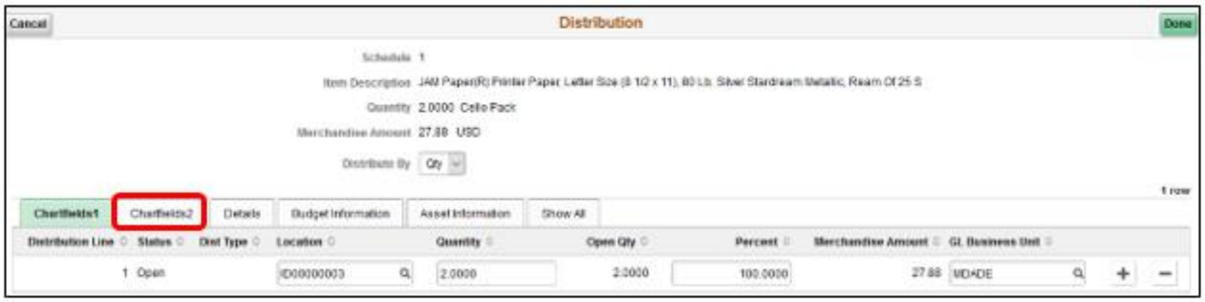


Lesson 1: Manage a Requisition

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.

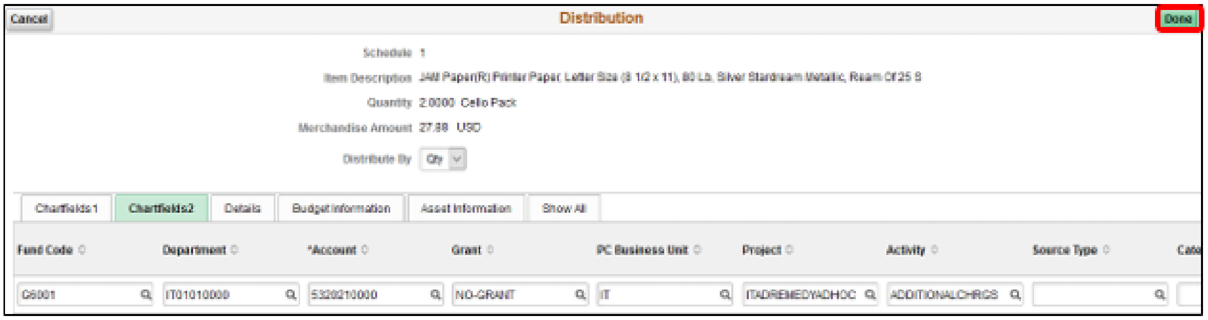
IMPORTANT! The following fields are required when expensing an item to an active capital or operational project that has been created in the Project Costing module. Leave the fields blank if it is not being expensed to a project.

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

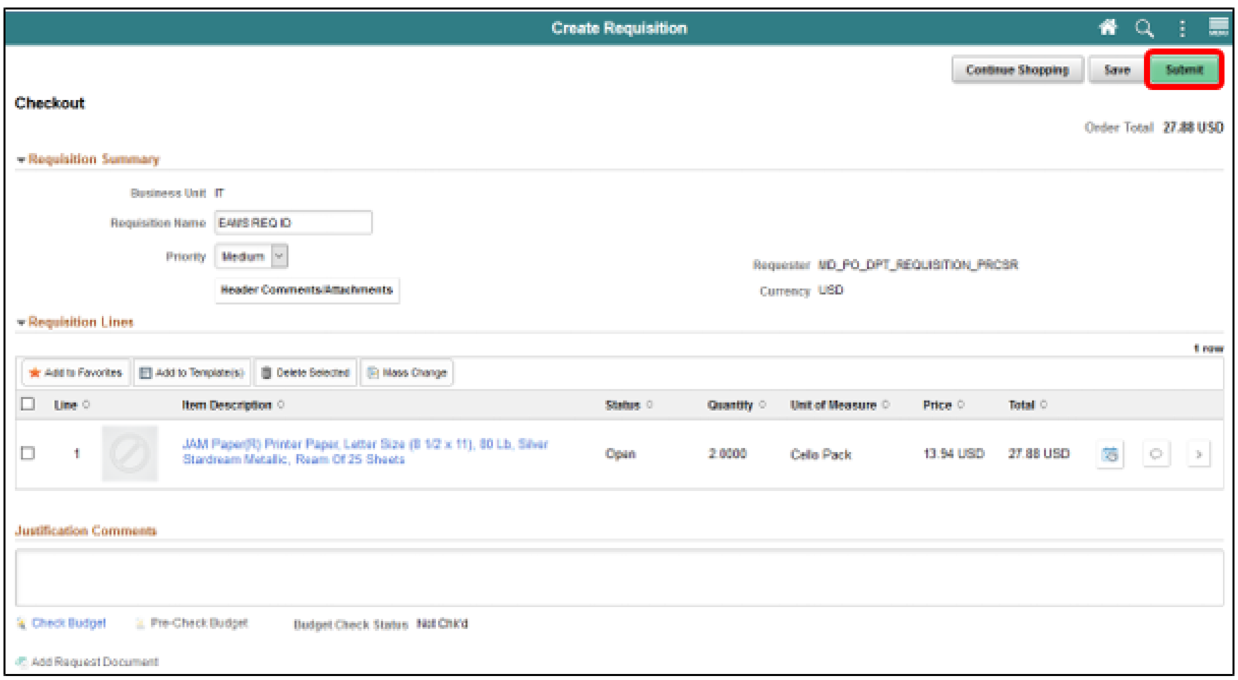
Lecture 1: Copy a Requisition

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.

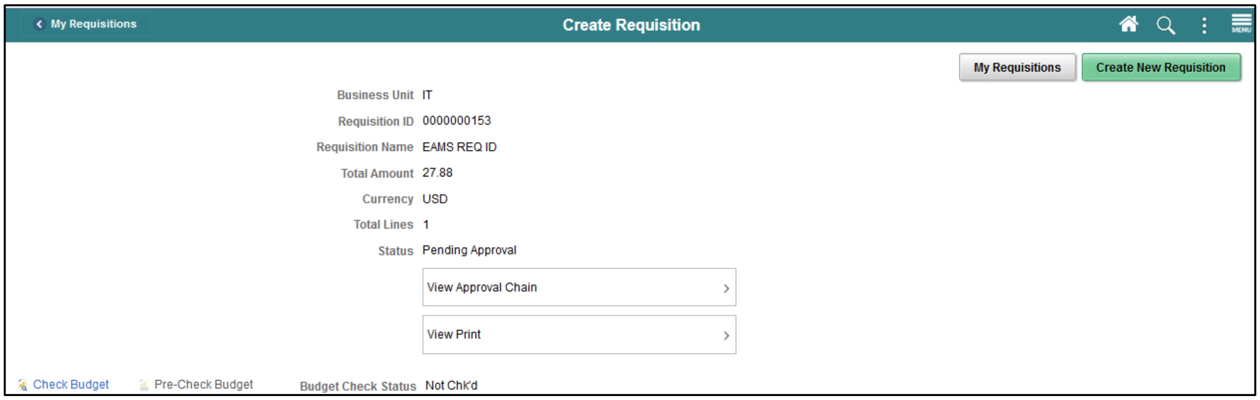
33. Select the **SUBMIT** button. The system will route to the Save Confirmation page.



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.



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

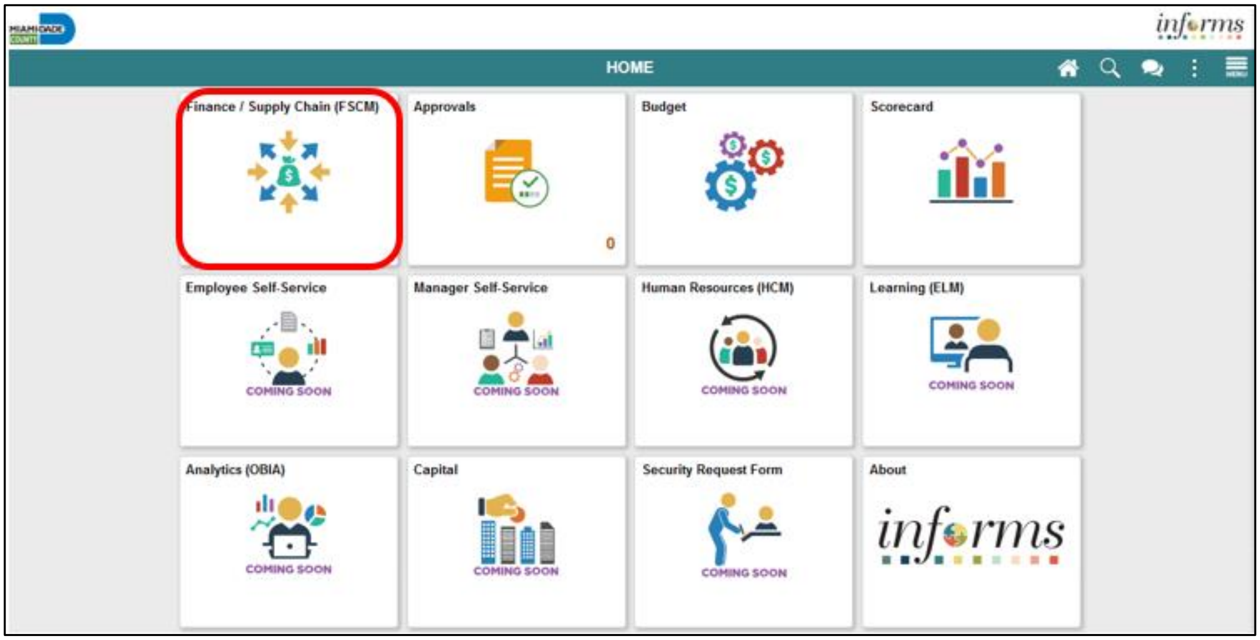
(True/False) The copy functionality defaults the requisition header, line, schedule, and distribution details on a new requisition. It also copies any comments and attachments added to the header, line, or schedule.

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***

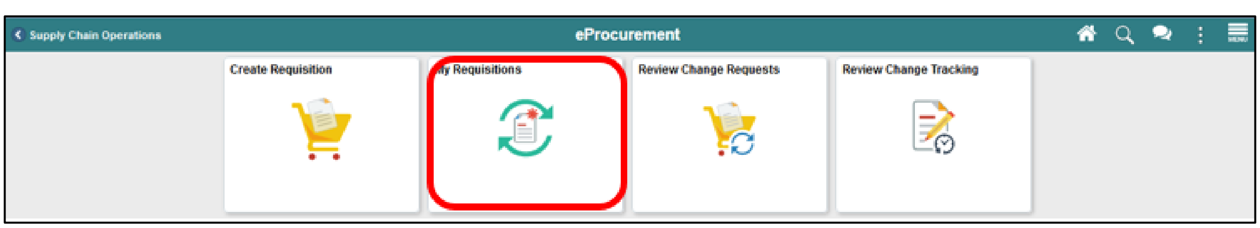
1. Login into **INFORMS** and select the **FINANCE/SUPPLY CHAIN (FSCM)** tile.



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 such results on the my requisitions page.

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

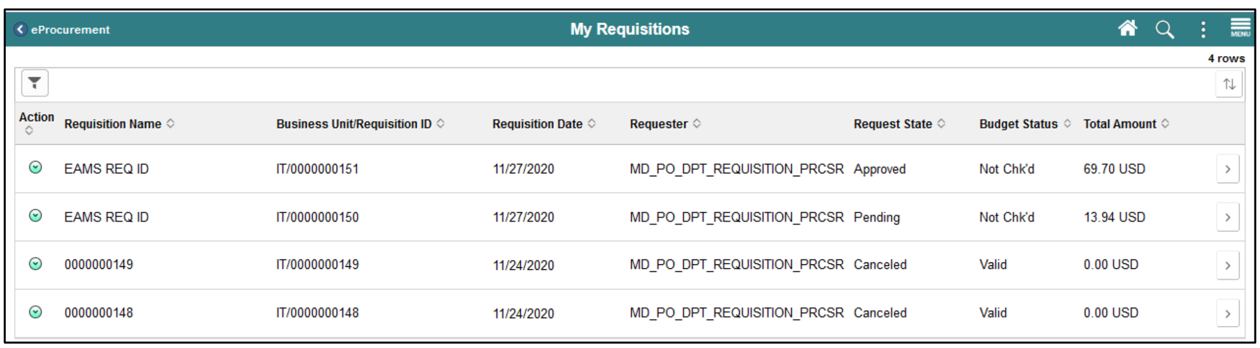
- Details
- Copy
- View Print
- Budget Check
- Edit

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

My Requisition Page: My requisitions page is used to view or take action on requisitions created by the requisitioner. The page 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.



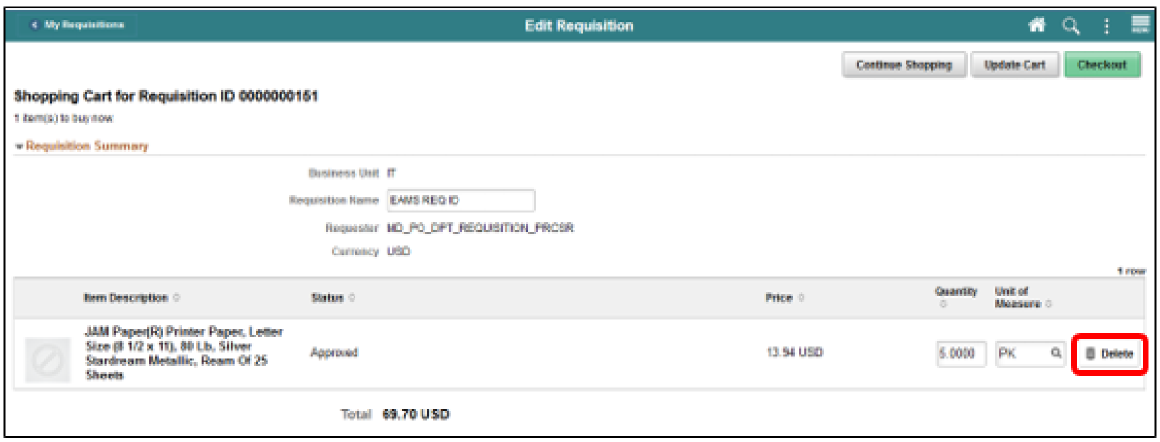
2. Select the **EDIT** option. The system will route the requisitioner to the edit requisition page.

Lesson 1: Manage a Requisition

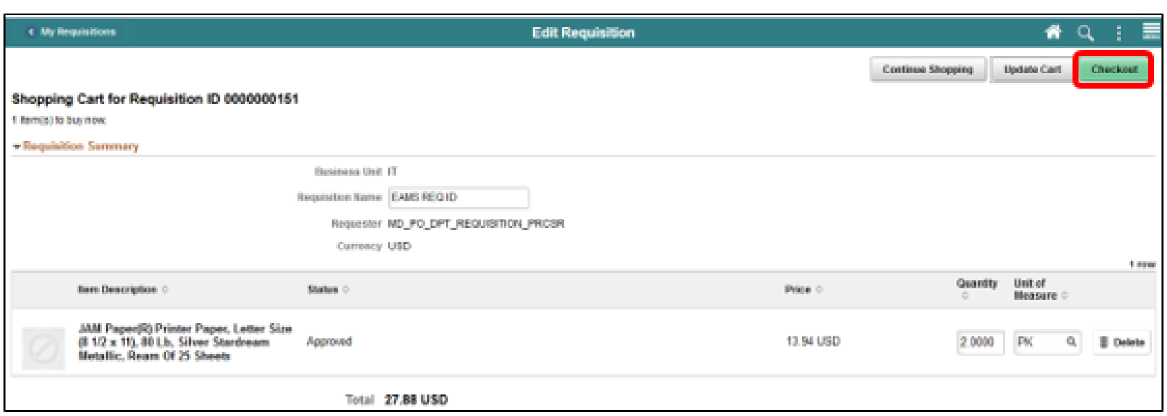
Lecture 2: Edit a Requisition

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.



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.

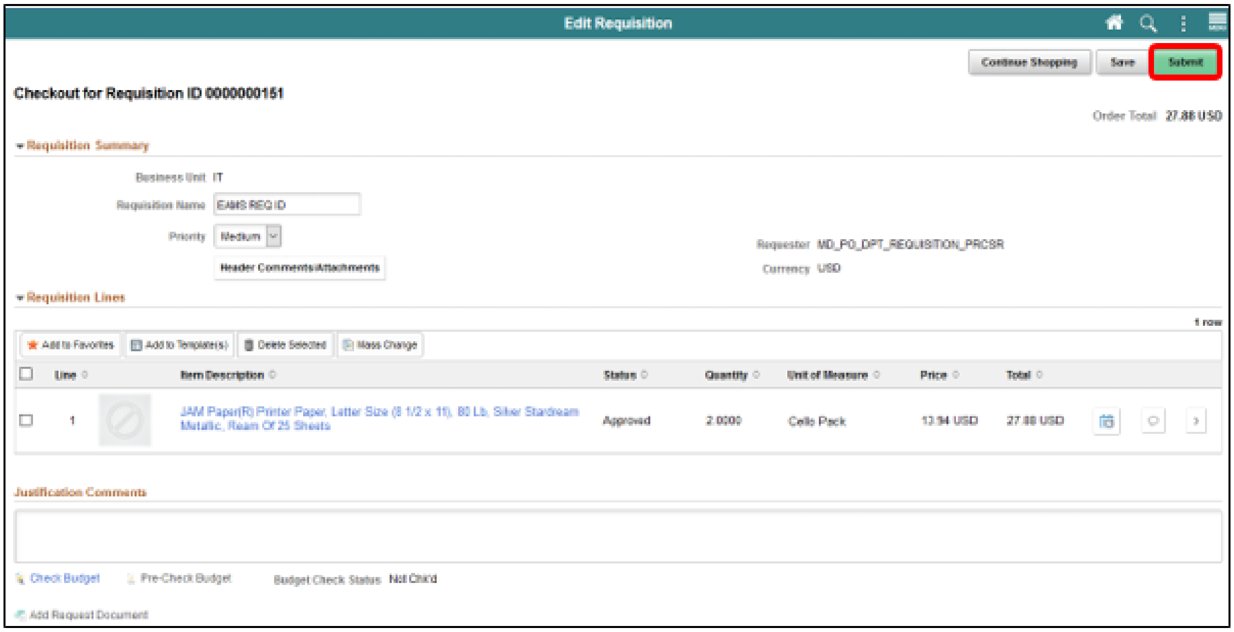


Lesson 1: Manage a Requisition

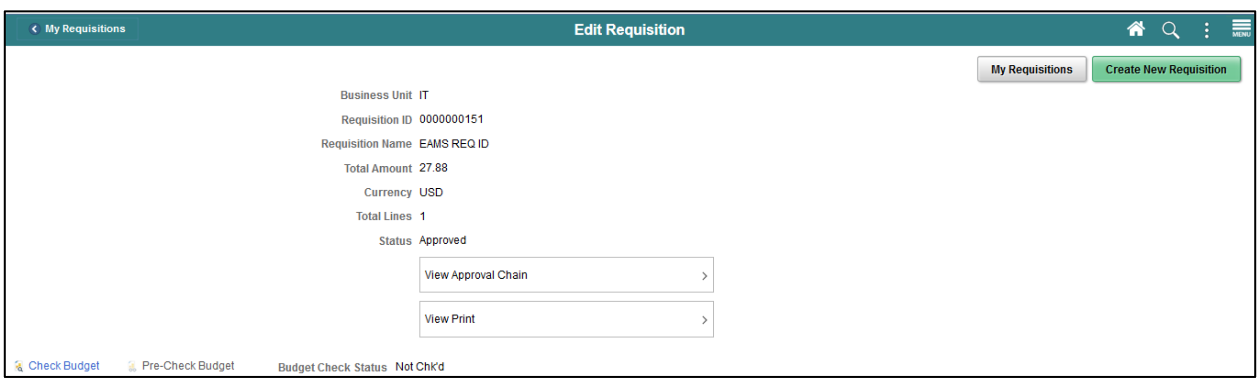
Lecture 2: Edit a Requisition

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.



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.



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

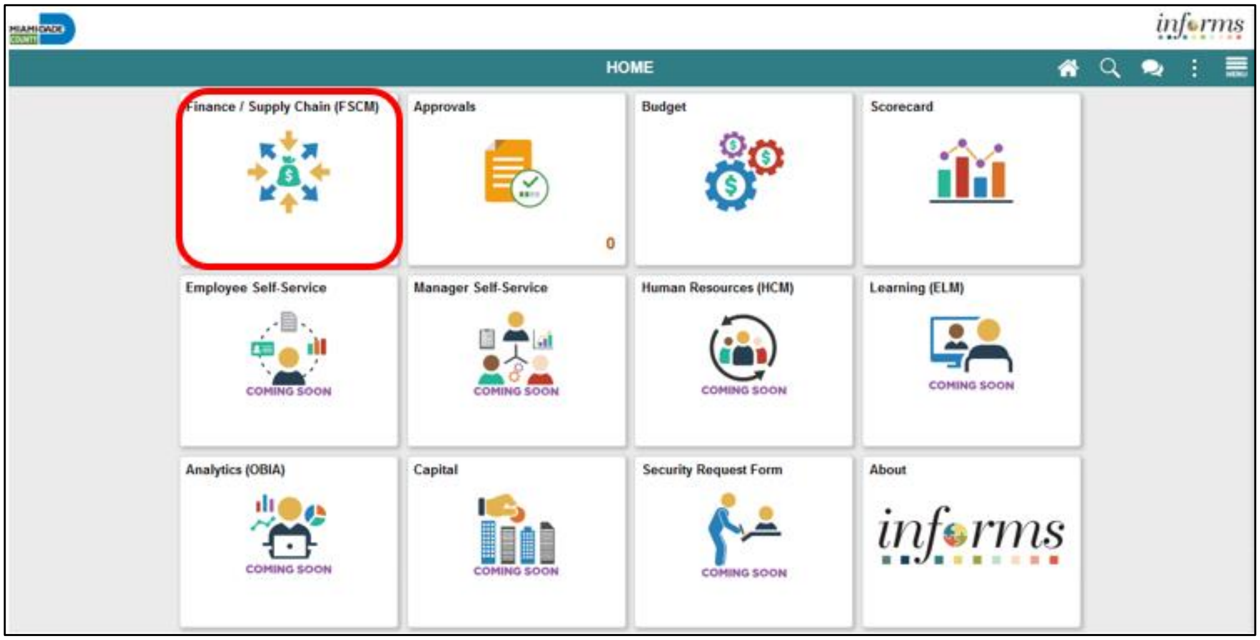
(True/False) When editing a requisition, the requisitioner cannot add more items to the requisition.

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 such results on the my requisitions page.

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

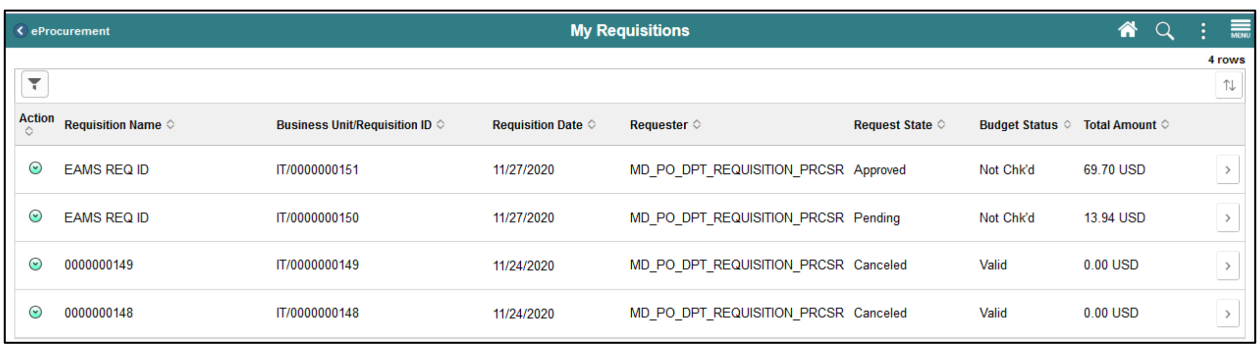
- Details
- Copy
- View Print
- Budget Check
- Edit

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

My Requisition Page: My requisitions page is used to view or take action on requisitions created by the requisitioner. The page 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.



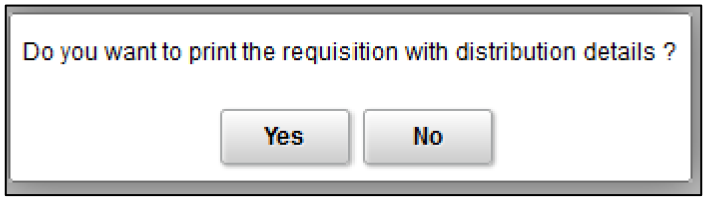
2. Select the **VIEW PRINT** option. The system will display a prompt.

Lesson 1: Manage a Requisition

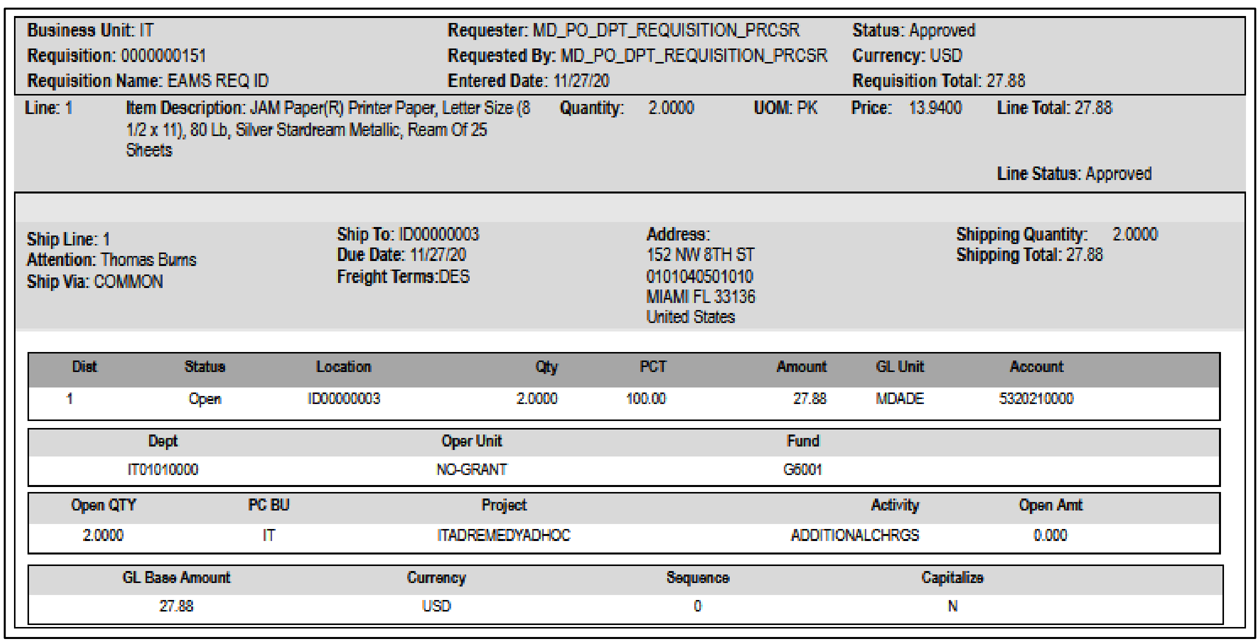
Lecture 3: View and Print a Requisition

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.



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



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

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

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

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

Dept	Oper Unit	Fund
IT01010000	NO-GRANT	G6001

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

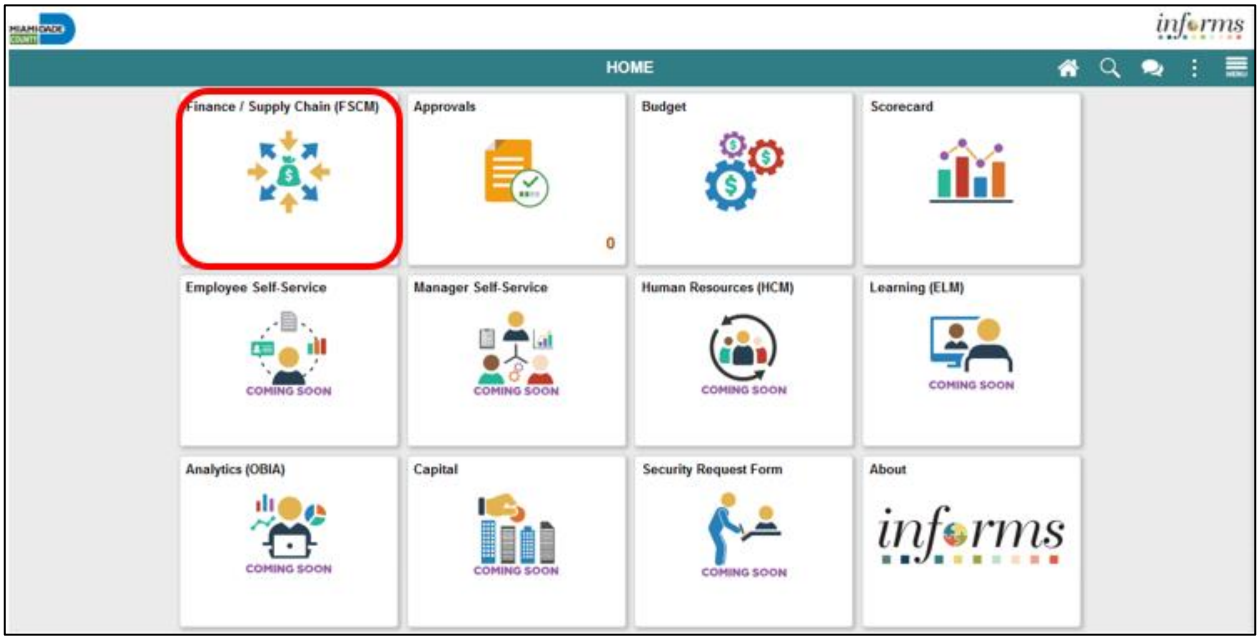
GL Base Amount	Currency	Sequence	Capitalize
27.88	USD	0	N

Lesson 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 such results on the my requisitions page.

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

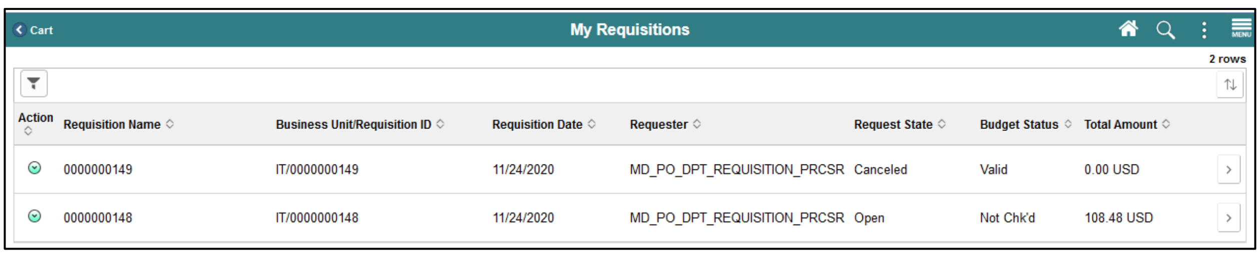
- Details
- Copy
- View Print
- Budget Check
- Edit

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

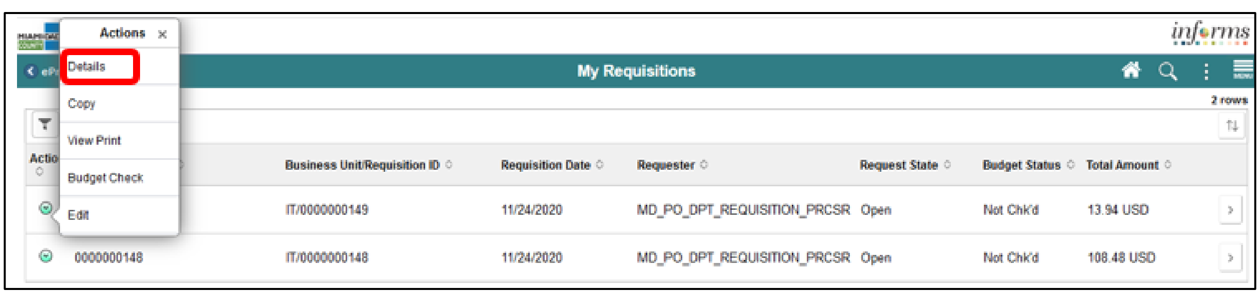
My Requisition Page: My requisitions page is used to view or take action on requisitions created by the requisitioner. The page will display the requisition name, business unit, requisition ID, requester, request state, budget status, and total amount.

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.



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

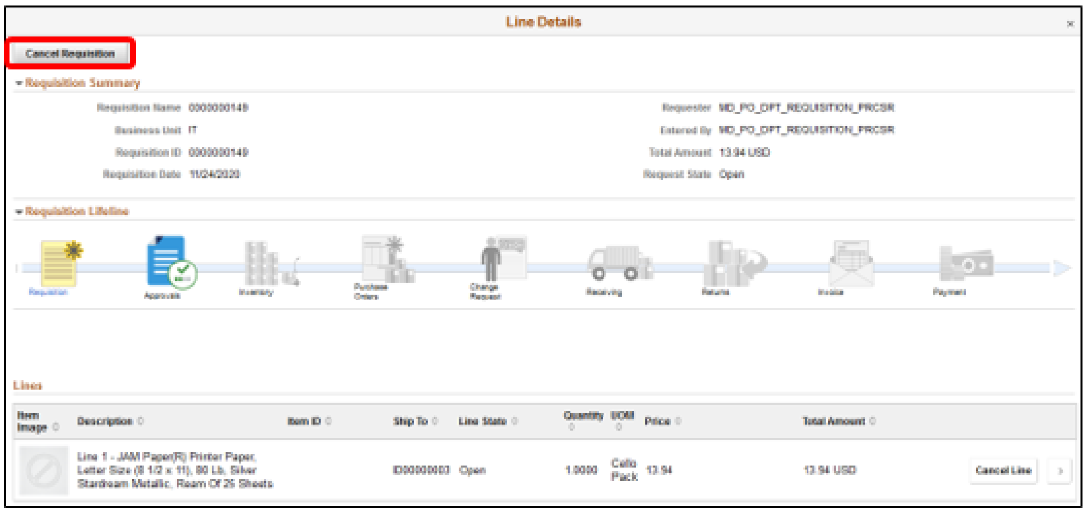


Lesson 1: Manage a Requisition

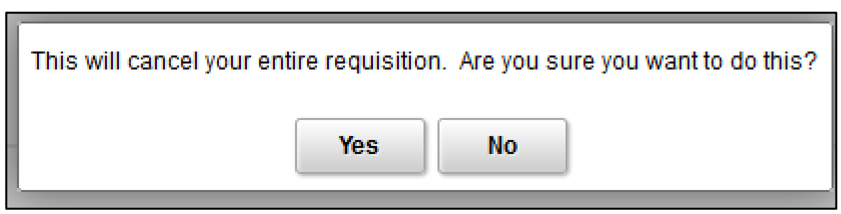
Lecture 4: Cancel a Requisition

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.



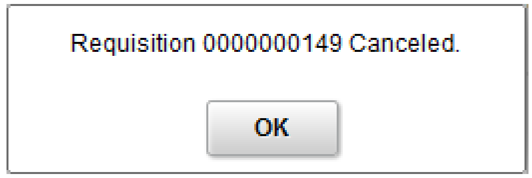
4. Select the **YES** button. The system will display the confirmation message. **IMPORTANT!** A canceled requisition cannot be reopened, and it is closed permanently. The requisitioner will be required to create a new requisition and submit through the approval process.



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.



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

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.

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:

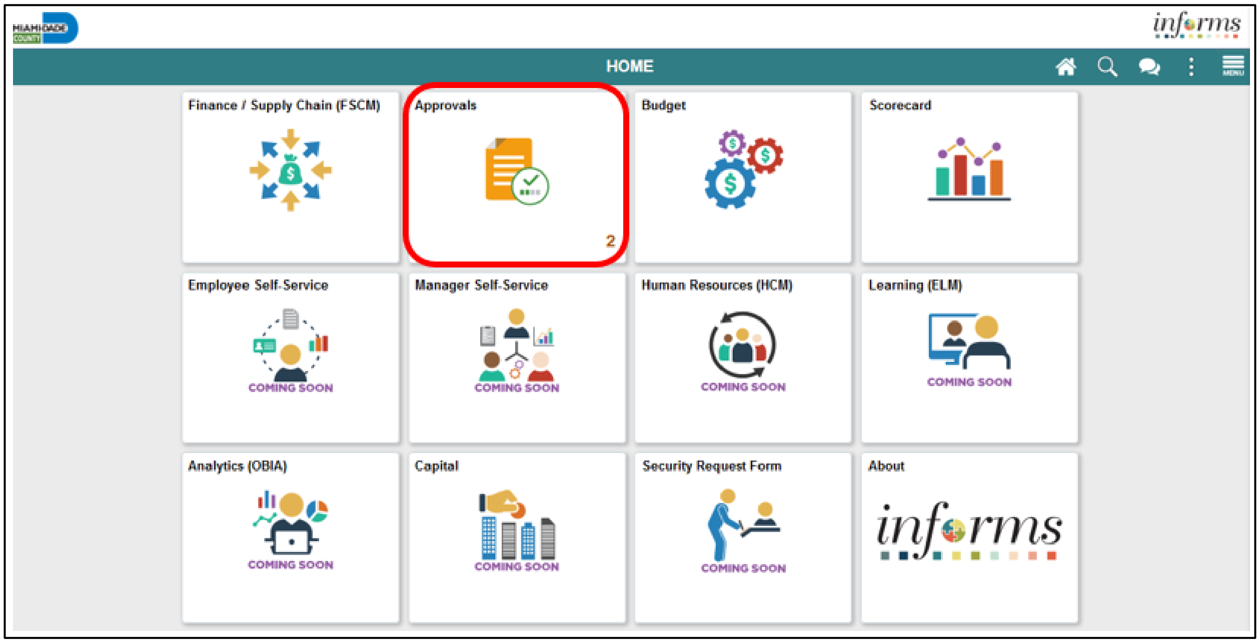
Term	Definition
Pending Approval Page	The Pending Approval Page displays pending requisition header information for the approver to review.
Requisition Header Approval Page	The Requisition Header Approval Page displays the requisition header, lines, and approver comments.
Approval Line Detail Page	The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

Lesson 2: Approve a Requisition

Lecture 1: Approve a Requisition

Navigate to **Approvals tile**

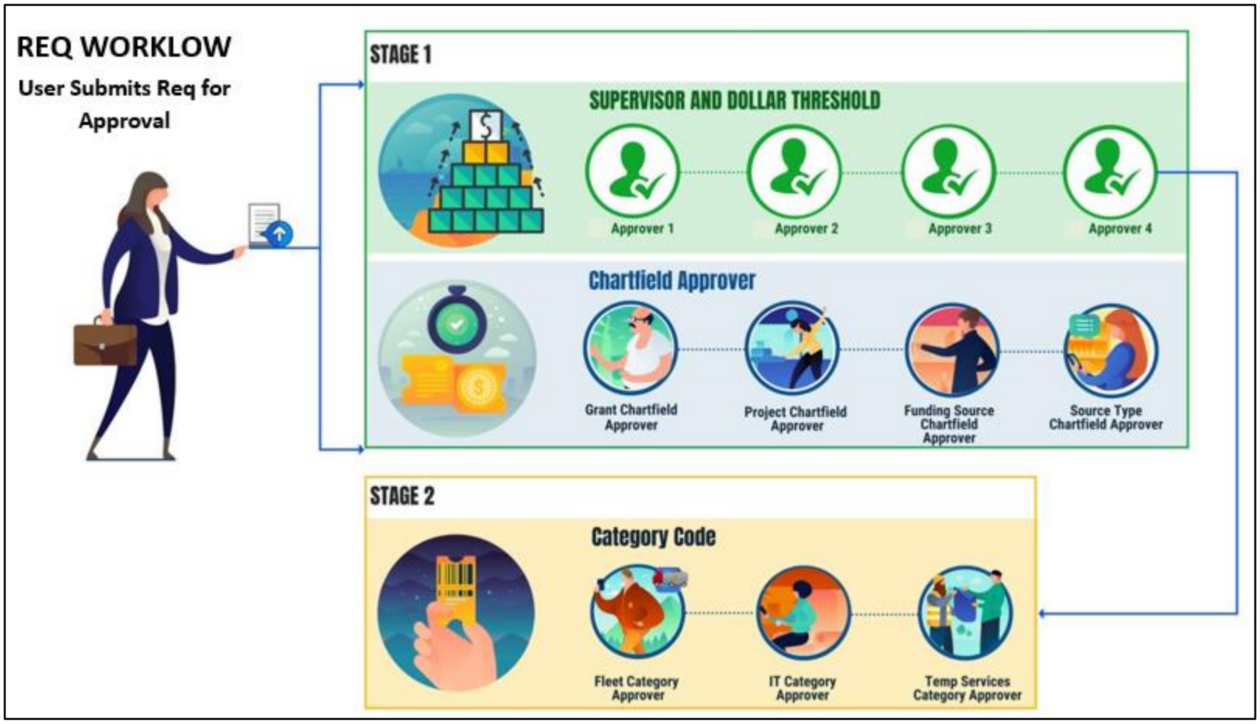
1. Login to INFORMS and select the **APPROVALS** tile.



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

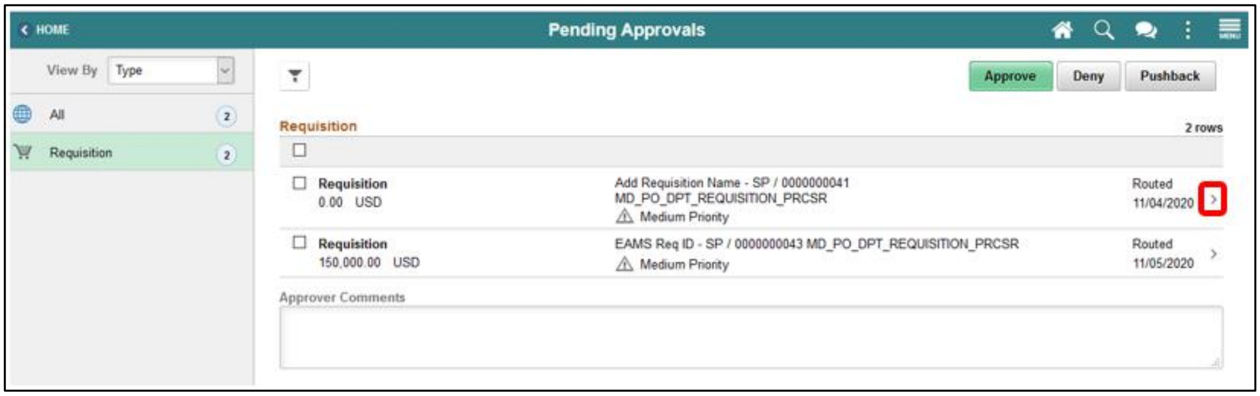
Lesson 2: Approve a Requisition

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.

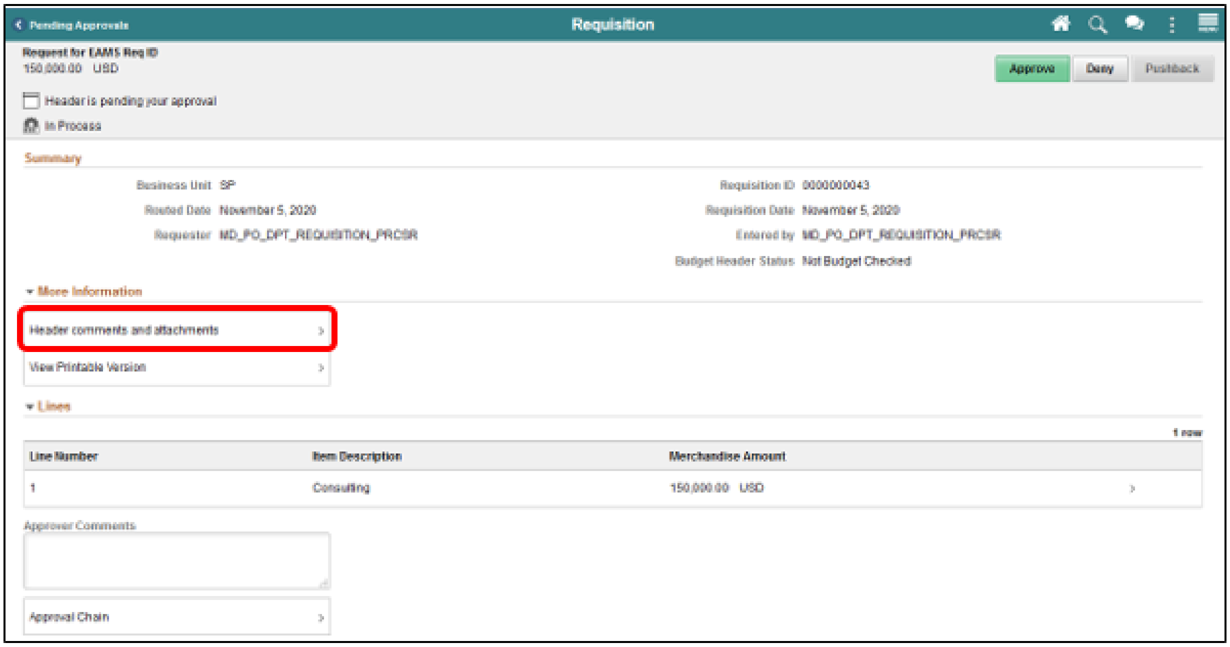


Requisition Header Approval Page: The requisition header approval page displays the requisition header, lines, and approver comments.

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.

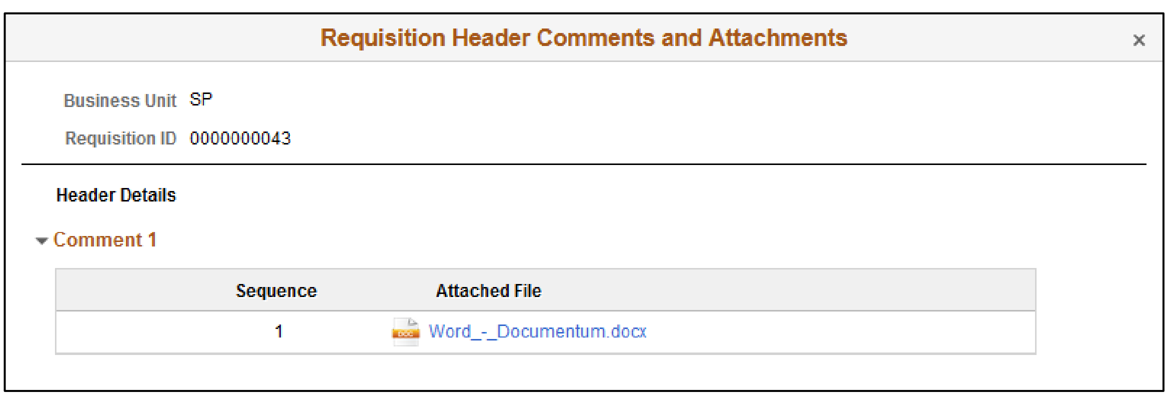


3. Review the comment text submitted by the requisitioner.
4. Select the **ATTACHED FILE** icon for each document that has been attached.

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.

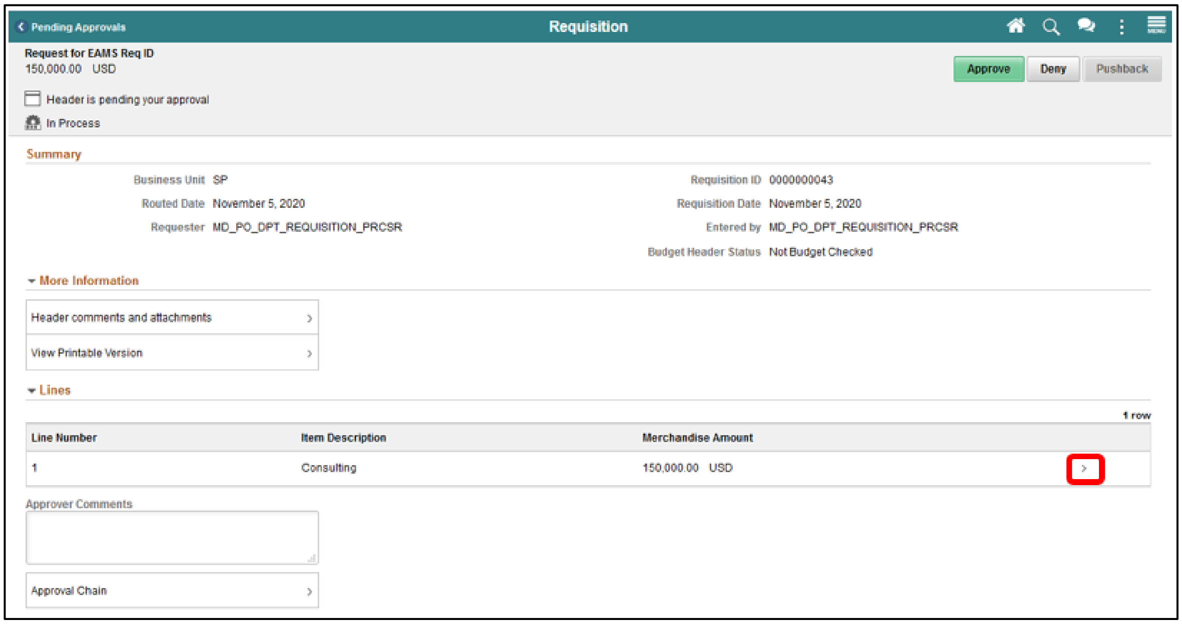


Lesson 2: Approve a Requisition

Lecture 1: Approve a Requisition

6. Select the **MORE** button.

This action will route to the approval line detail page.

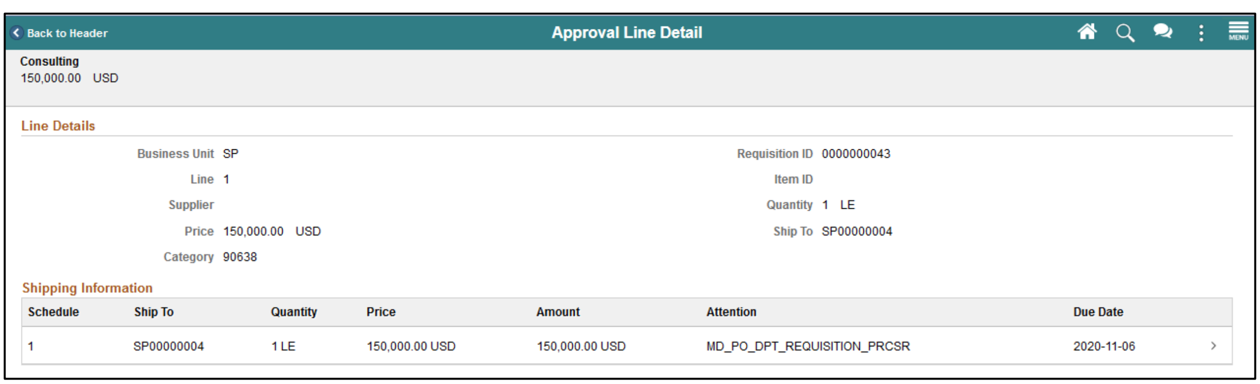


Approval Line Detail Page: The approval line detail page displays the requisition line and shipping information.

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.

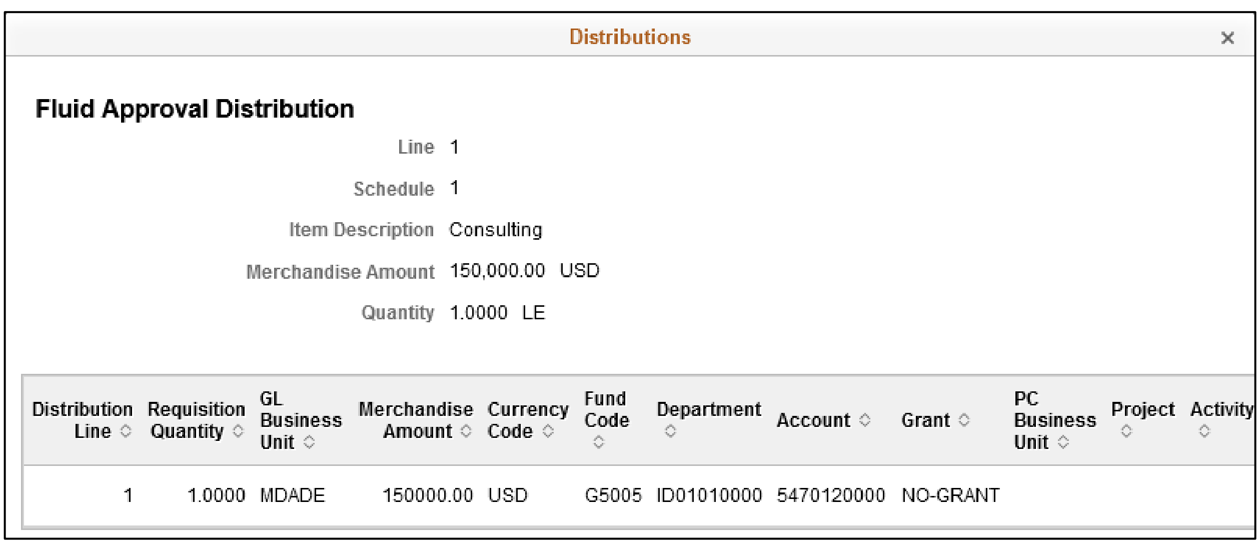
IMPORTANT! The accounting information entered at the beginning of the procure-to-pay process (requisition) will carry over to the purchase order and voucher. It is critical to the process that the correct ChartField values have been added.

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.

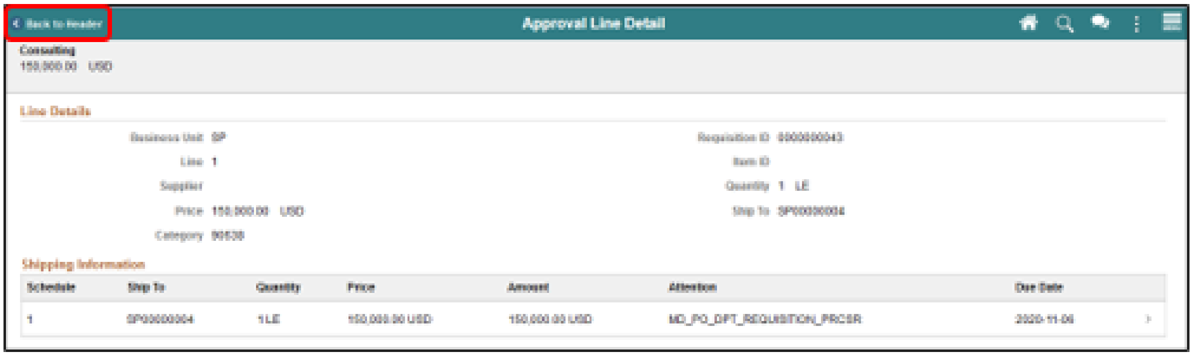
14. Confirm the **PC BUSINESS UNIT** value. This field should reflect the Business Unit of the requestor.
15. Confirm the **PROJECT** value. This value is created in the Project Costing module.
16. Confirm the **ACTIVITY** value. The activity value represents a subtask in project costing (i.e., Planning, 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.



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.

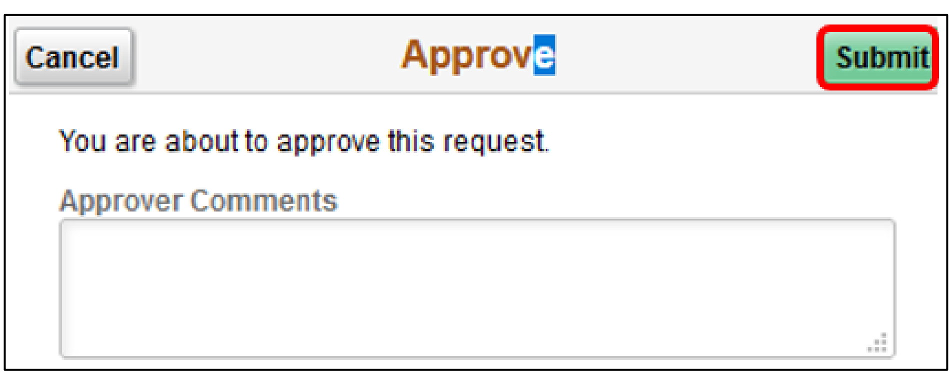


Requisition Header Page: Once all requisition values have been reviewed and confirmed:

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

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

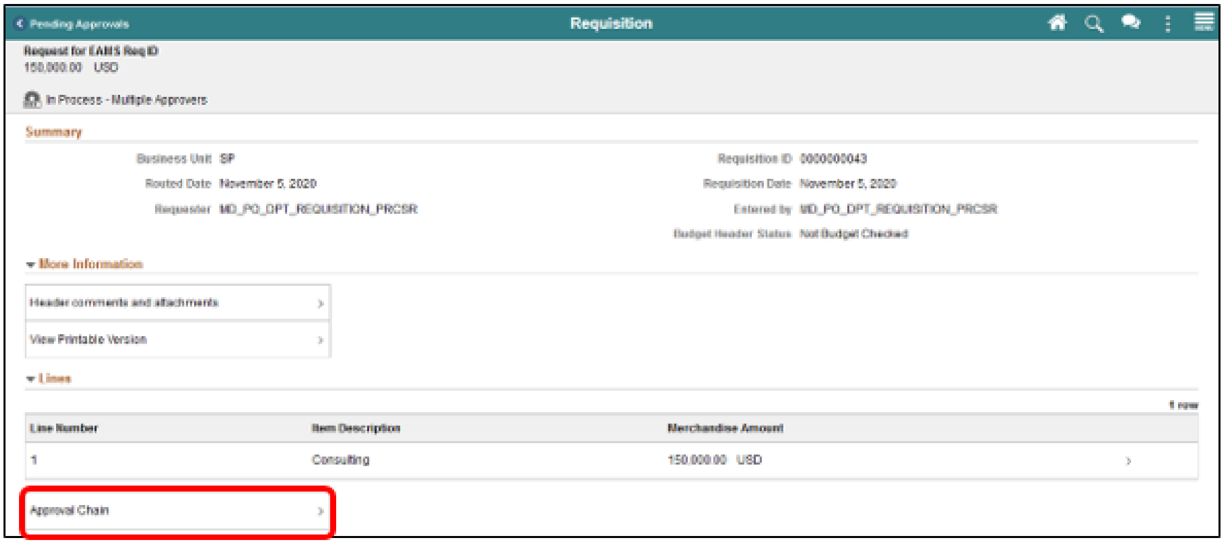
22. Select the **SUBMIT** button. This action will route the back requisition header page.



Lesson 2: Approve a Requisition

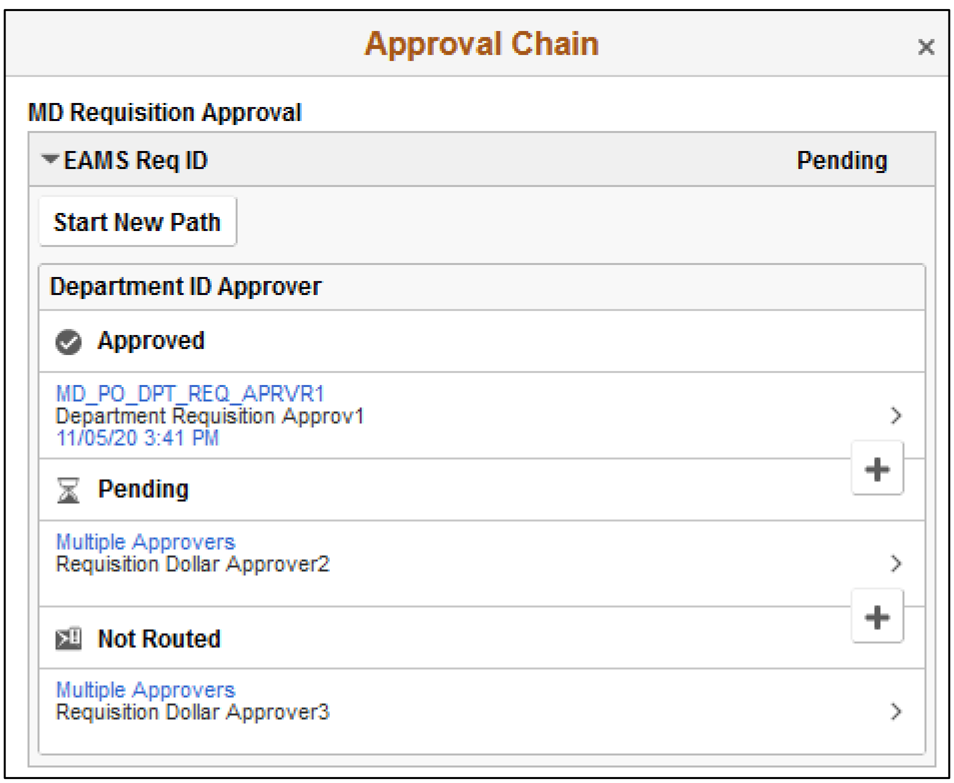
Lecture 1: Approve a Requisition

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



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

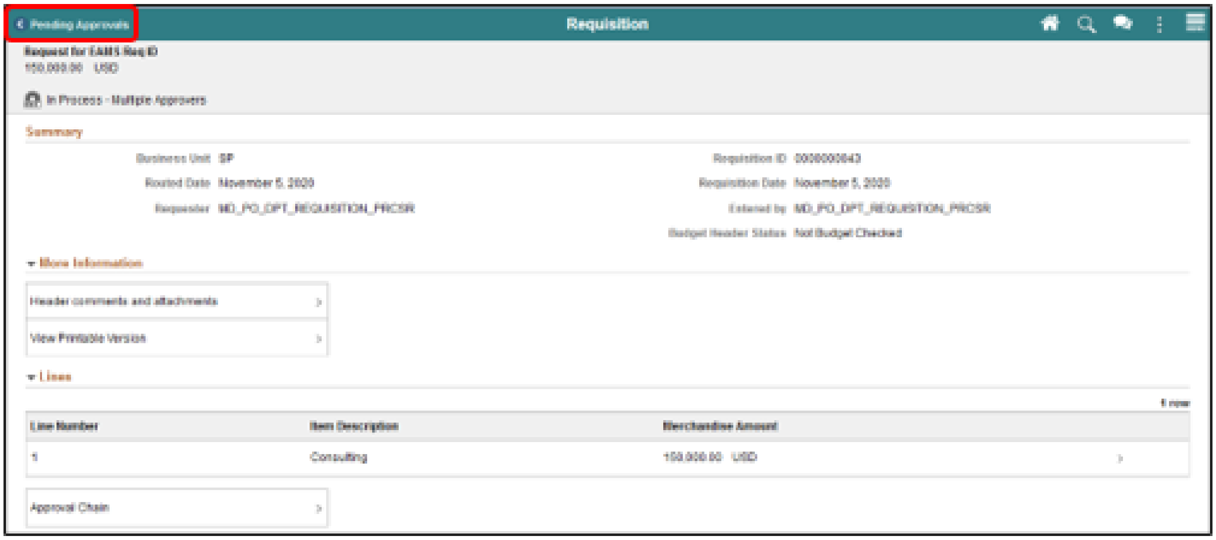
24. Select the **CLOSE** button. This action will route back requisition header page.



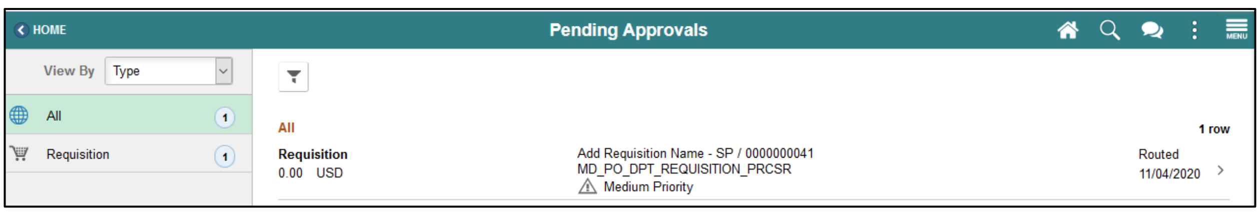
Lesson 2: Approve a Requisition

Lecture 1: Approve a Requisition

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



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



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

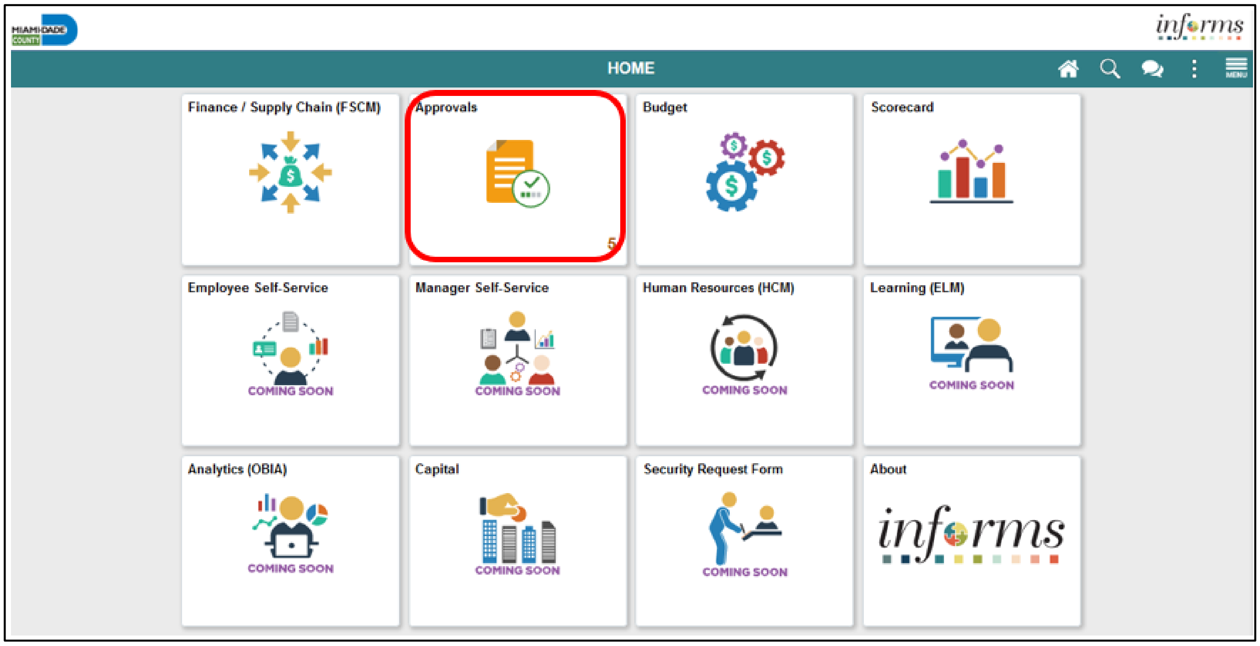
(True/False) The approver should validate that the market research provided meets the standards set by the departments purchasing unit.

Lesson 2: Approving a Requisition

Lecture 2: Deny a Requisition

Navigate to **Approvals tile**

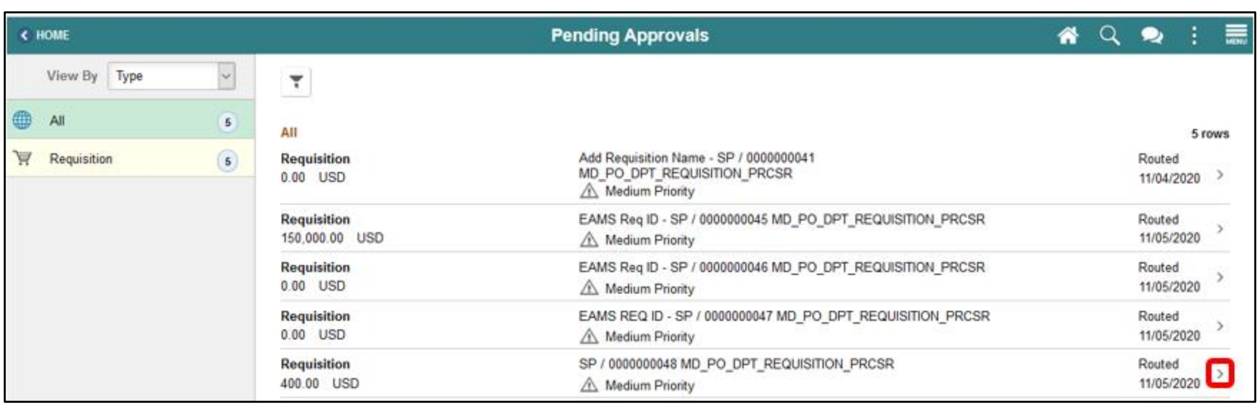
1. Login to INFORMS and select the **APPROVALS** tile.



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.

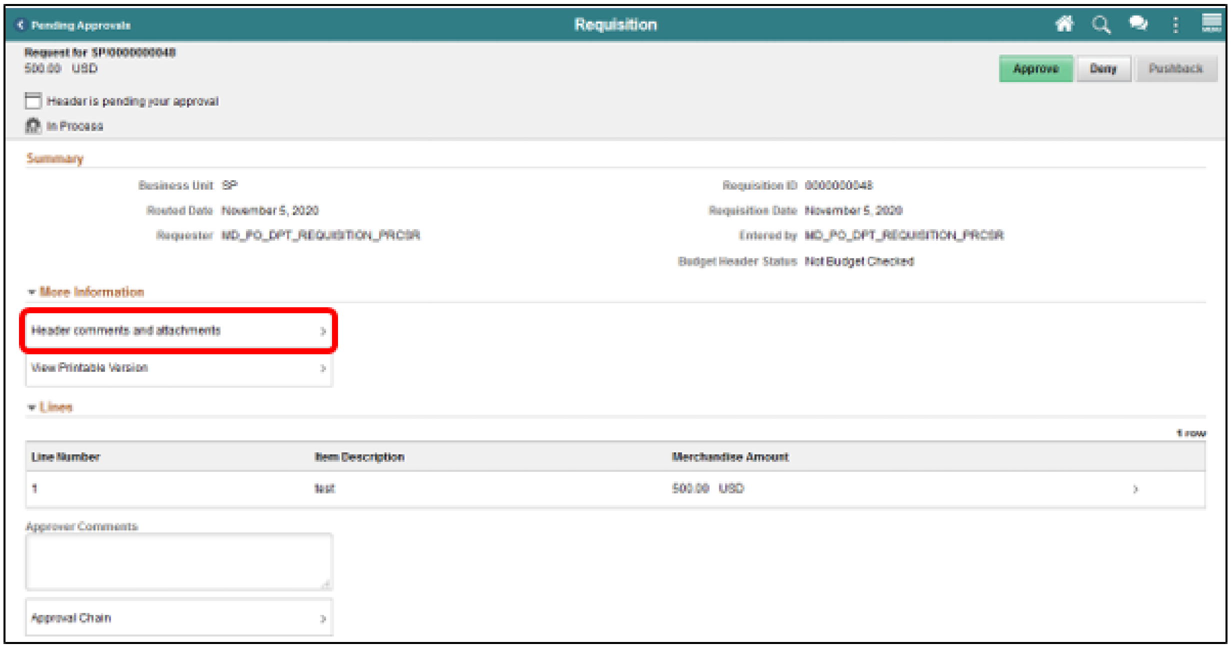


Lesson 2: Approving a Requisition

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.

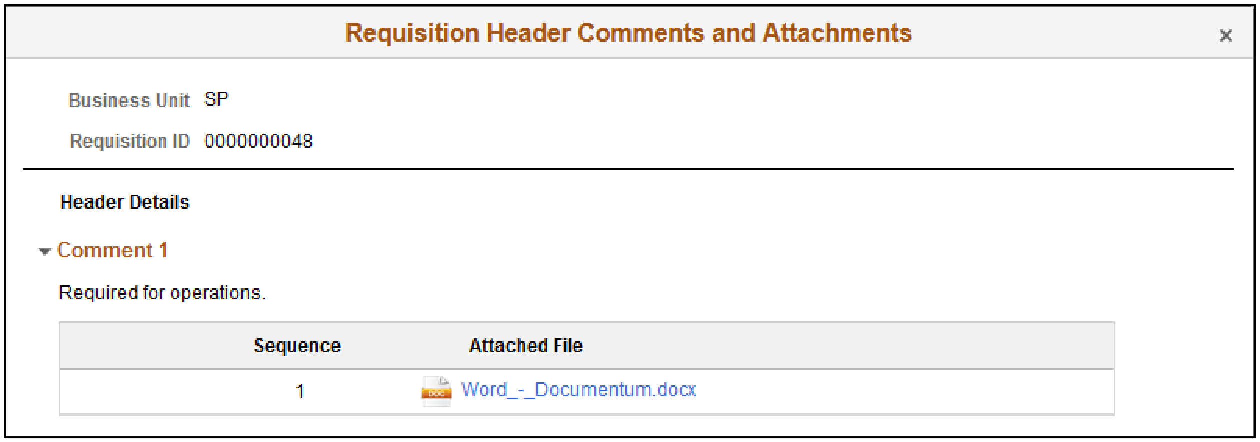
2. Select the **HEADER COMMENTS AND ATTACHMENTS** button. This action will route the approver to the requisition header comments and attachments page.



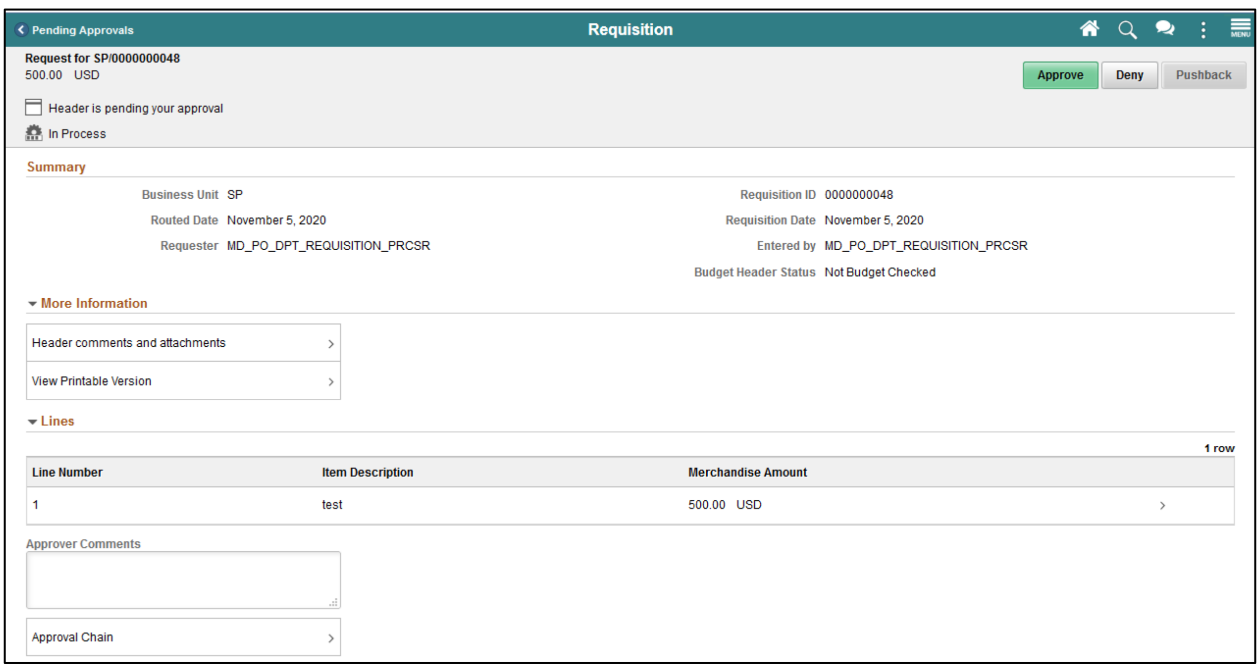
Lesson 2: Approving a Requisition

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.



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

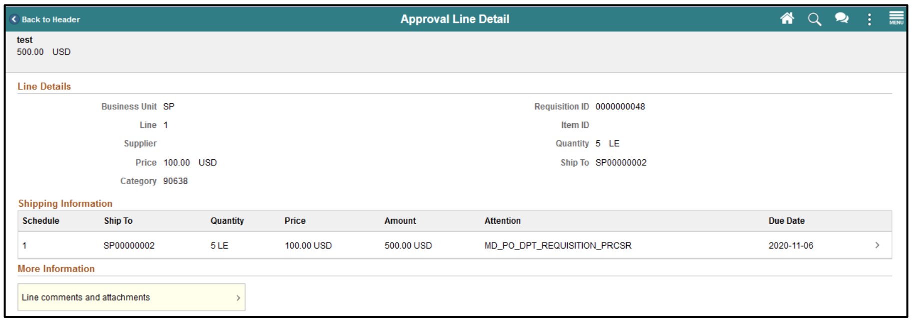


Lesson 2: Approving a Requisition

Lecture 2: Deny a Requisition

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

2. Review the ***Line Details*** section and confirm that the correct **QUANTITY** and **PRICE** are listed.
3. 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).
4. Select the **MORE** button. This action will route to the distribution page.



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.

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

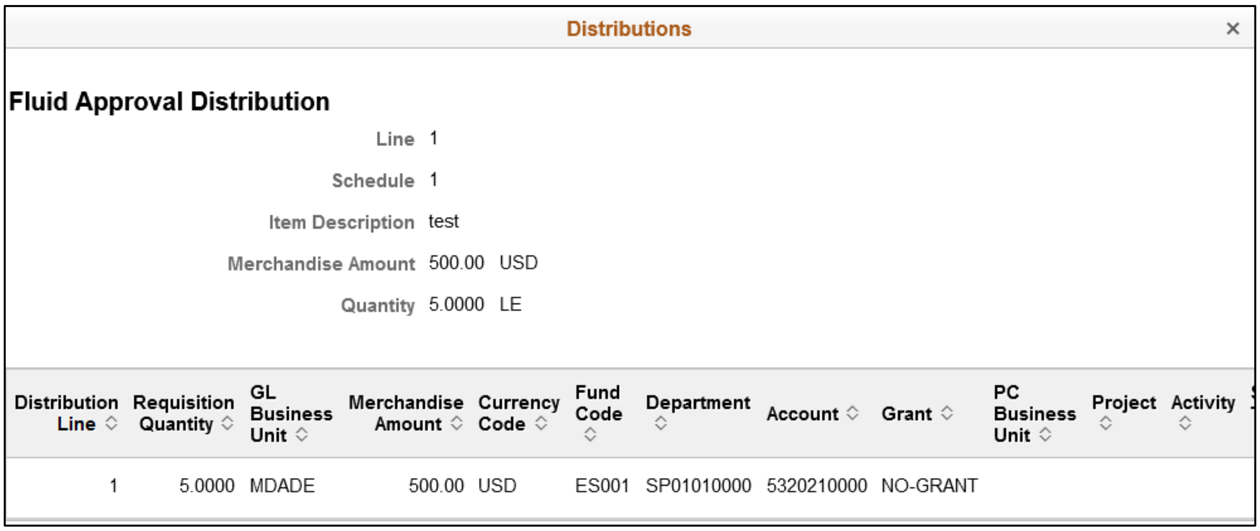
IMPORTANT! The following fields are required when expensing an item to an active capital or operating project that has been created in the Project Costing module. The requisitioner must leave the fields blank if there are no expense requisition lines to a project.

11. Confirm the **PC BUSINESS UNIT** value. This field should reflect the business unit of the requestor.

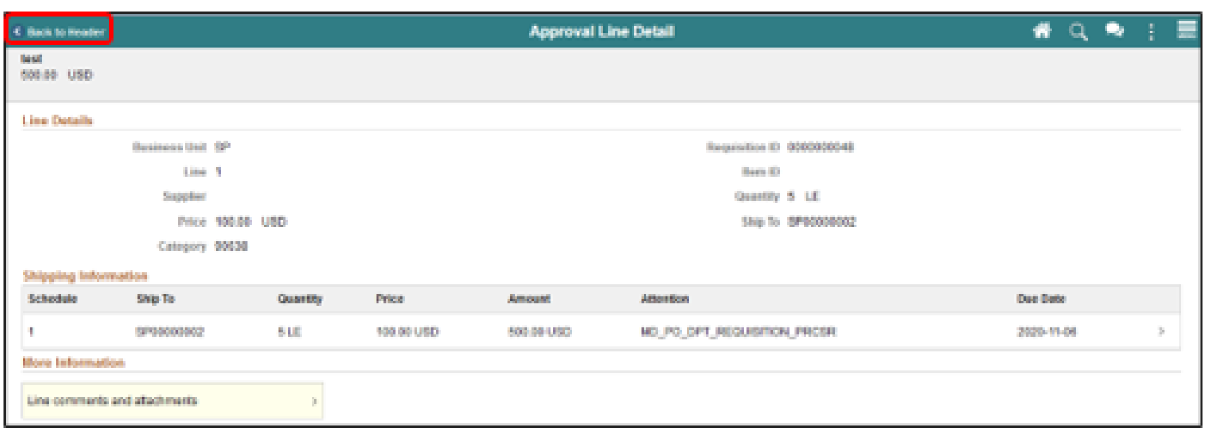
Lesson 2: Approving a Requisition

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.



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

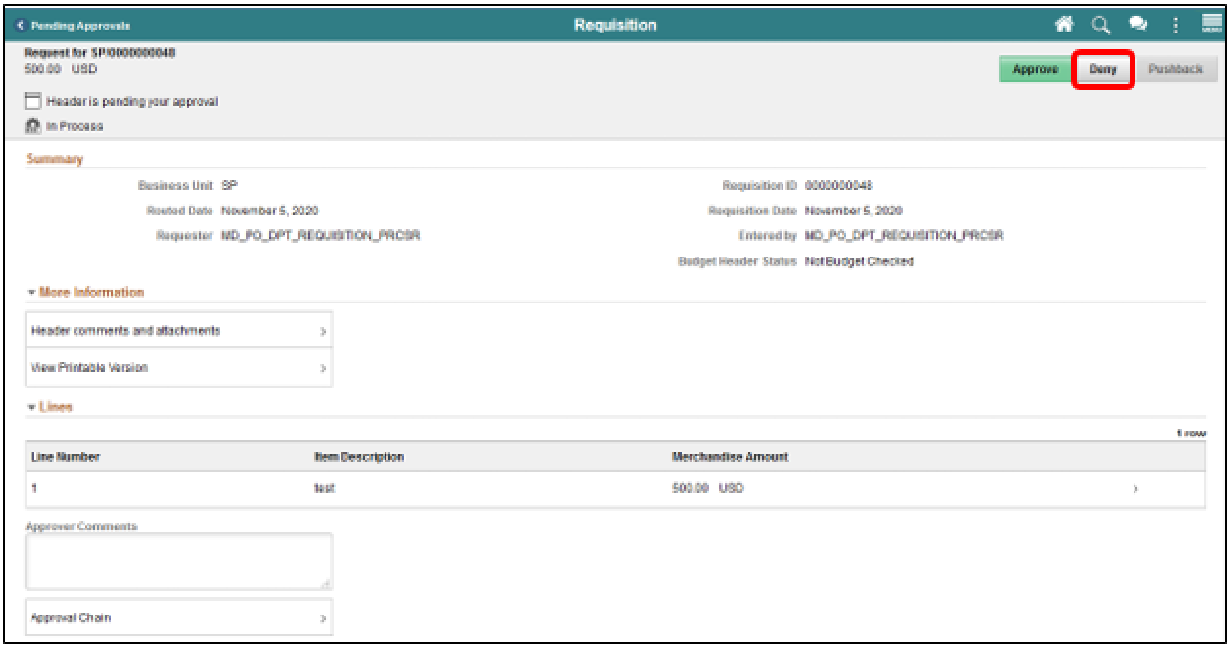


Lesson 2: Approving a Requisition

Lecture 2: Deny a Requisition

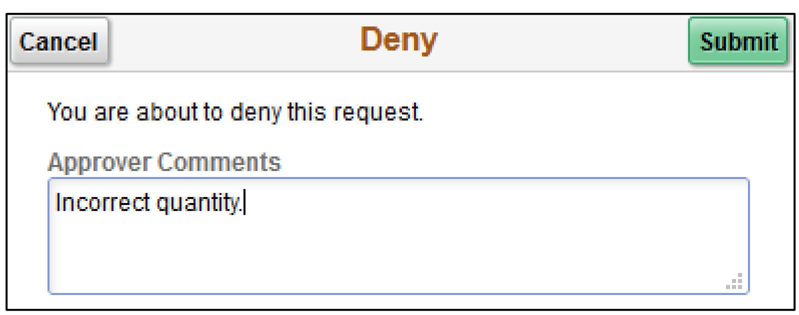
Note: All approvers can deny a requisition. When a requisition is denied, the approval workflow stops regardless of the approval level and sets the transaction back to the requisitioner.

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



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.

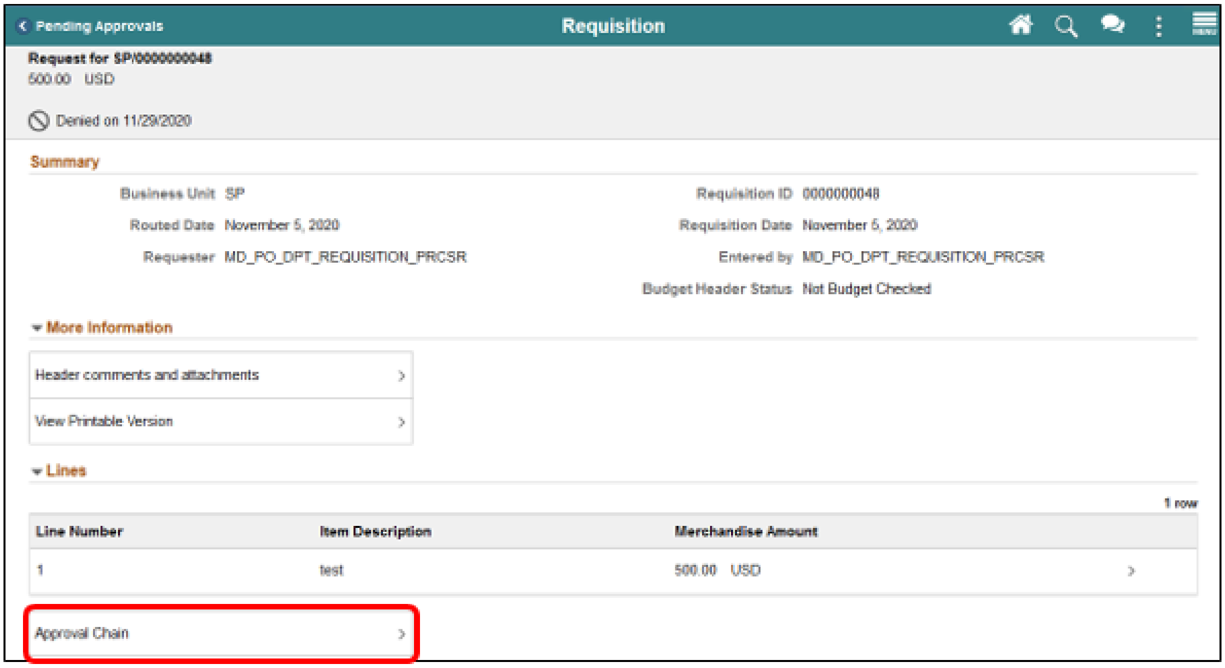
17. Enter approver comments.
18. Select the **SUBMIT** button. This action will return the approver to the requisition header page.



Lesson 2: Approving a Requisition

Lecture 2: Deny a Requisition

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



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

Lesson 2: Training Exercise 2

Debrief

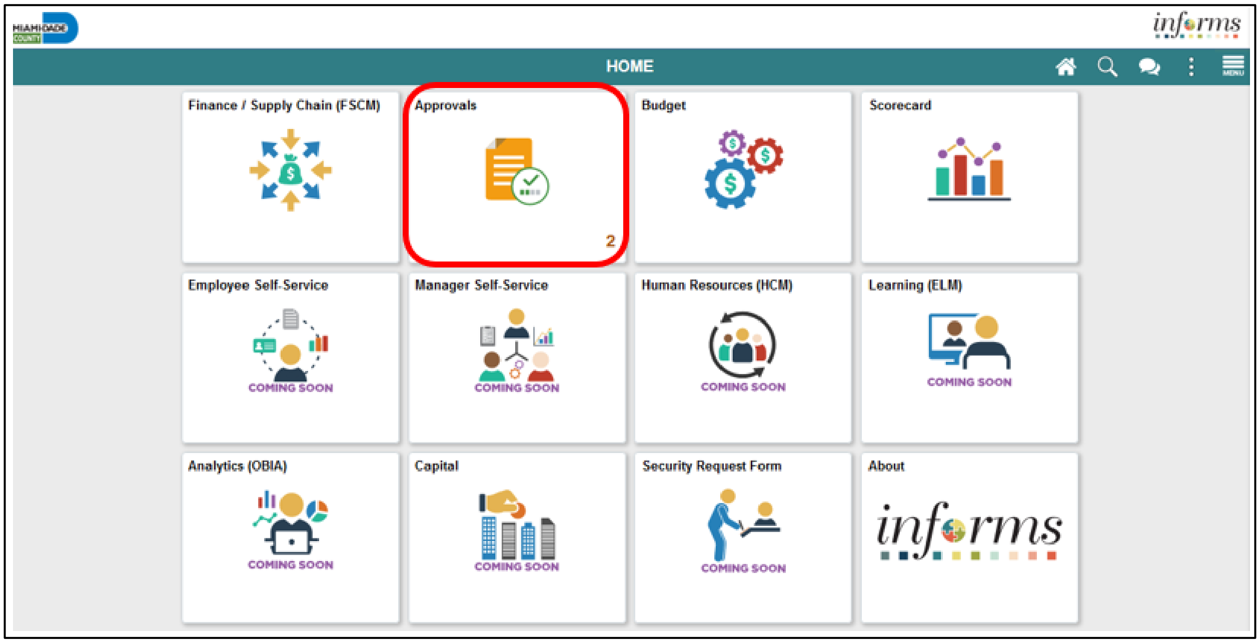
(True/False) When a requisition is denied, the approval workflow stops regardless of the approval level and sets the transaction back to the requisitioner.

Lesson 2: Approving a Requisition

Lecture 3: Pushback a Requisition

Navigate to **Approvals tile**

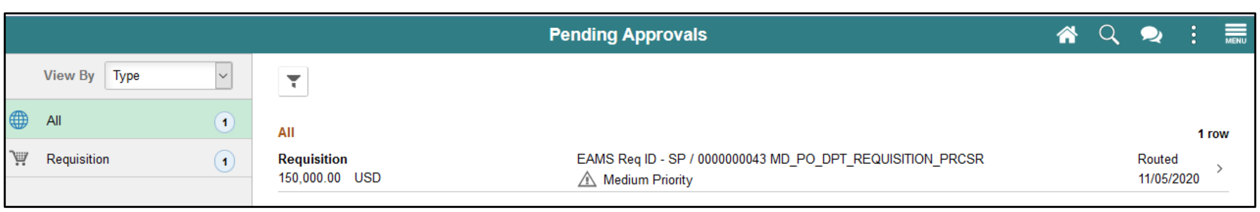
1. Select the **APPROVALS** tile.



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.

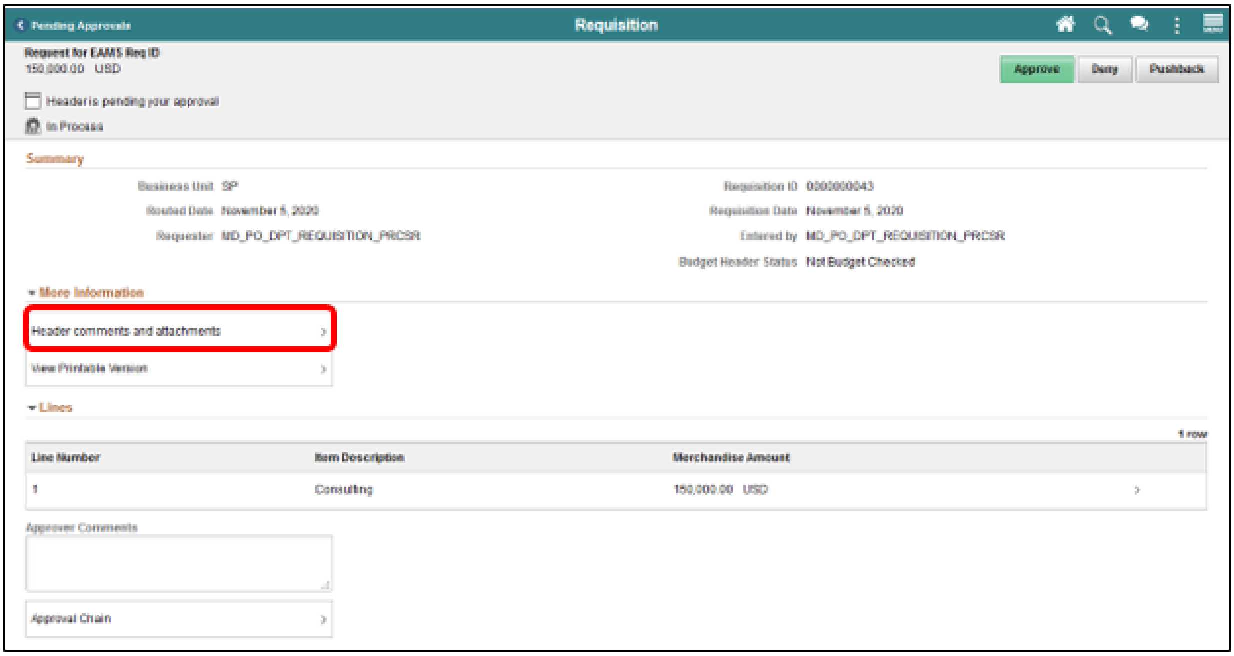


Lesson 2: Approving a Requisition

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.



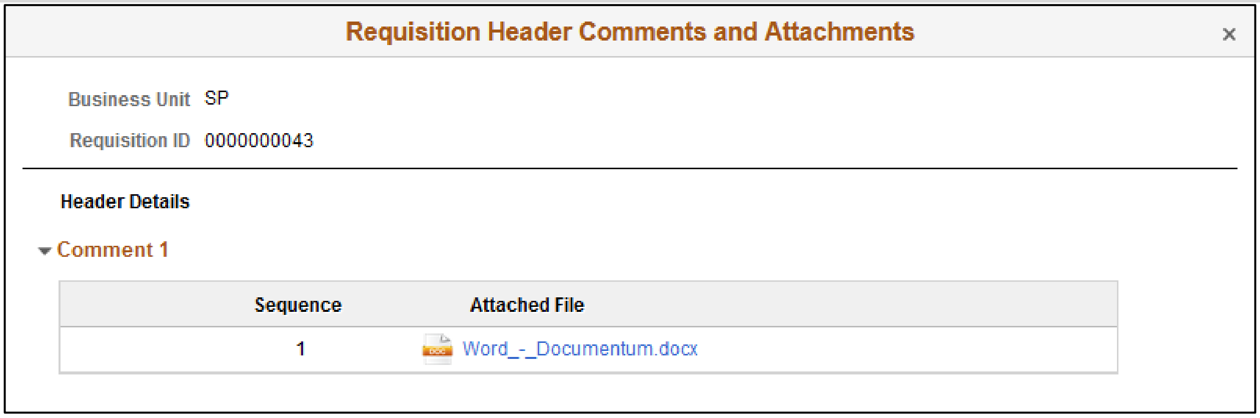
4. Review the comment text submitted by the requisitioner.
5. Select the **ATTACHED FILE** icon for each document that has been attached.

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.

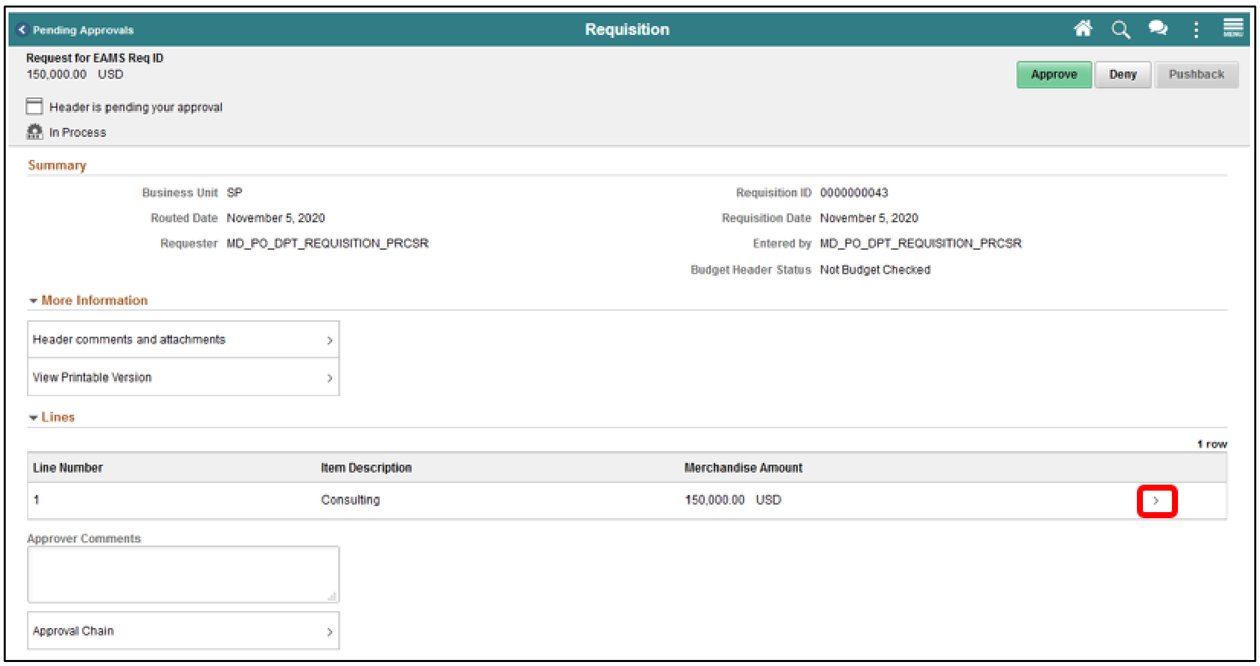
6. Select the **CLOSE** button. The action will route back to the requisition header approval page.

Lesson 2: Approving a Requisition

Lecture 3: Pushback a Requisition



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



Approval Line Detail Page:

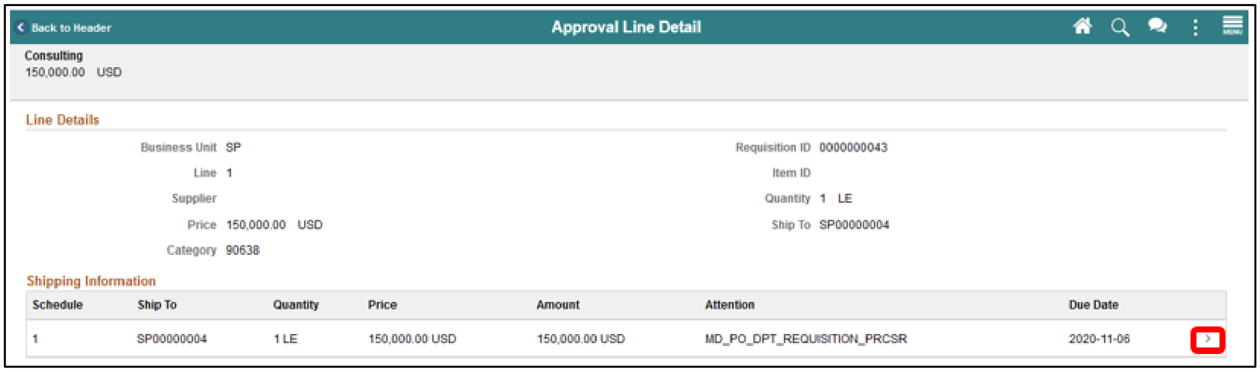
8. The approval line detail page displays the requisition line and shipping information.
9. Review the ***Line Detail*** section and confirm that the correct quantities and prices are listed.
10. Review the Shipping Information section and confirm that the **SHIP TO**, **ATTENTION TO,** and **DUE DATE**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



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.

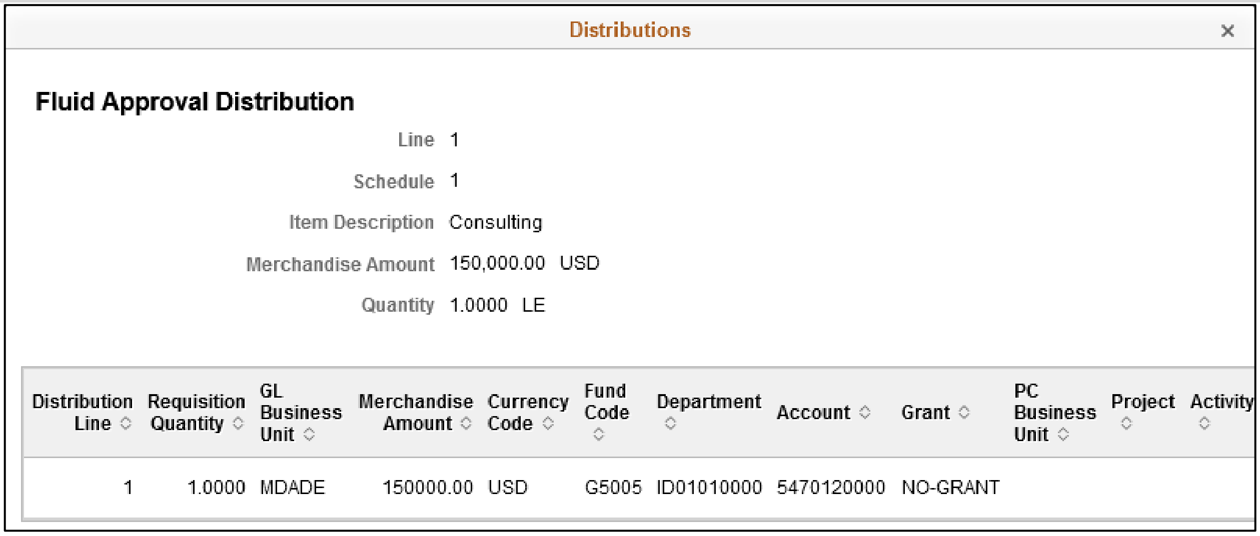
Note: A requisitioner must enter an actual grant value if this item is expensed to an active grant. If not, the "**NO-GRANT**" value must be selected.

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.

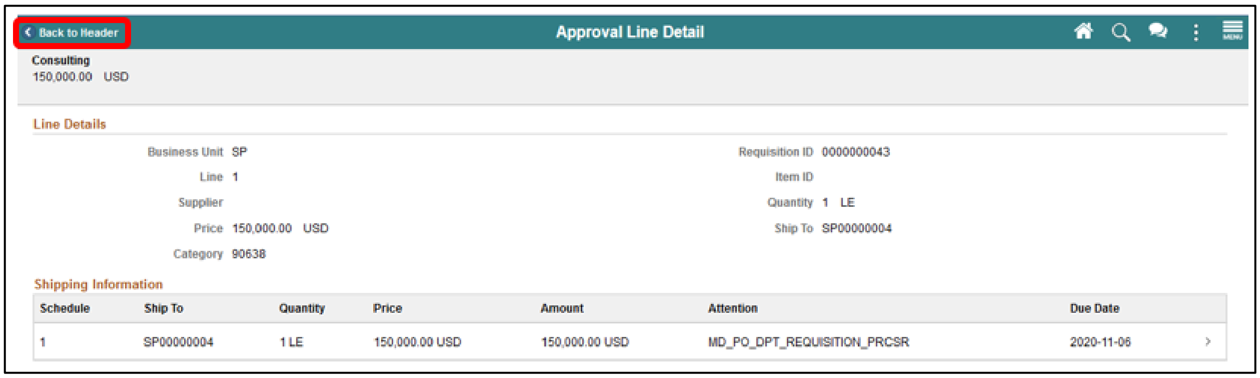
16. Confirm the **PC BUSINESS UNIT** value. This field should reflect the Business Unit of the requestor.
17. Confirm the **PROJECT** value. This value is created in the Project Costing module and must be in an active status.
18. Confirm the **ACTIVITY** value. The activity value represents a subtask 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



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



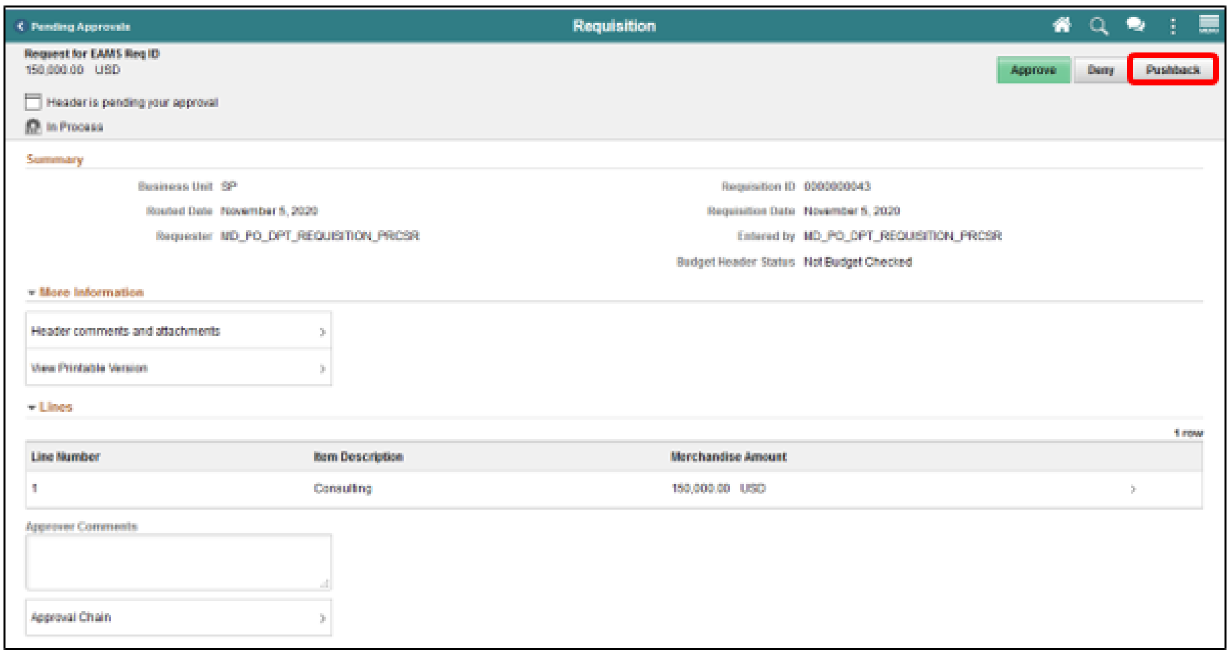
Lesson 2: Approving a Requisition

Lecture 3: Pushback a Requisition

Requisition Header Page:

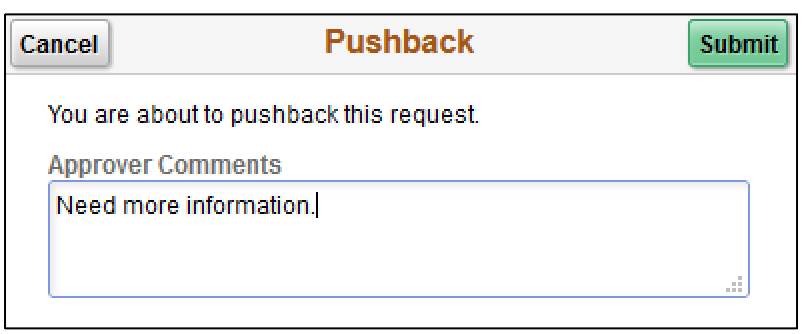
Note: Only the second, third, and or fourth approvers can use the pushback functionality. A pushback action returns the transaction to the previous approval step, requiring the prior approver to reevaluate the approval. The meaning of pushback is that the approver is questioning the prior step's approval 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.

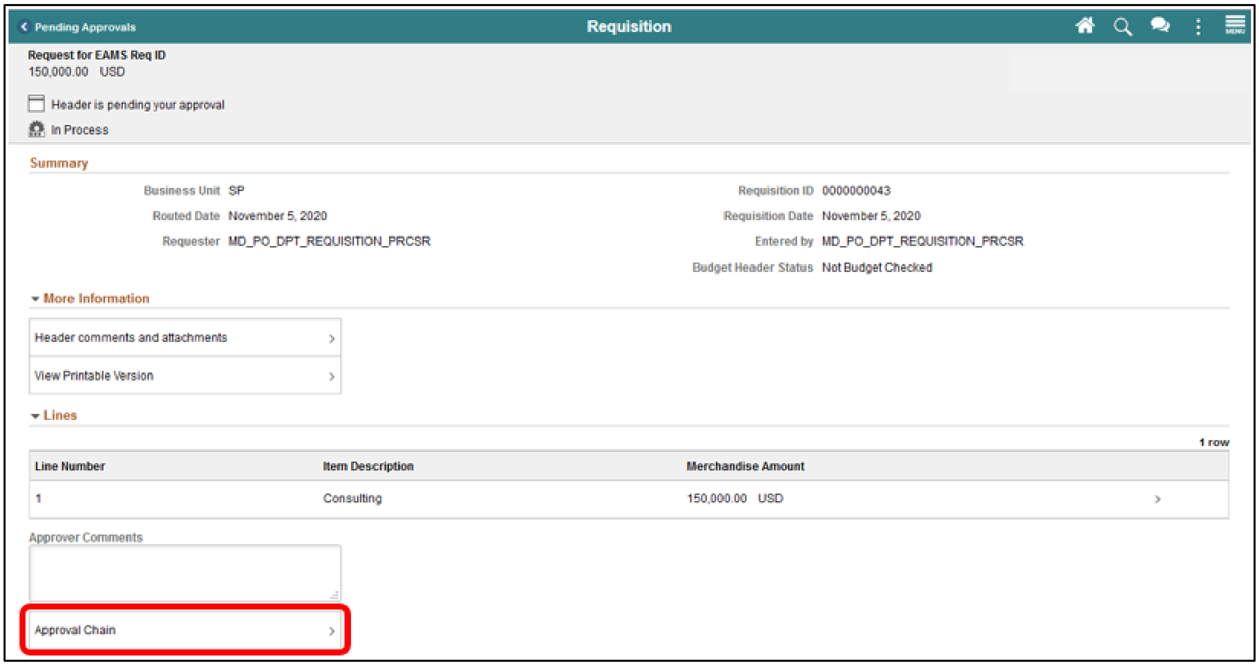
23. Select the **SUBMIT** button. This action will return to the requisition header page.



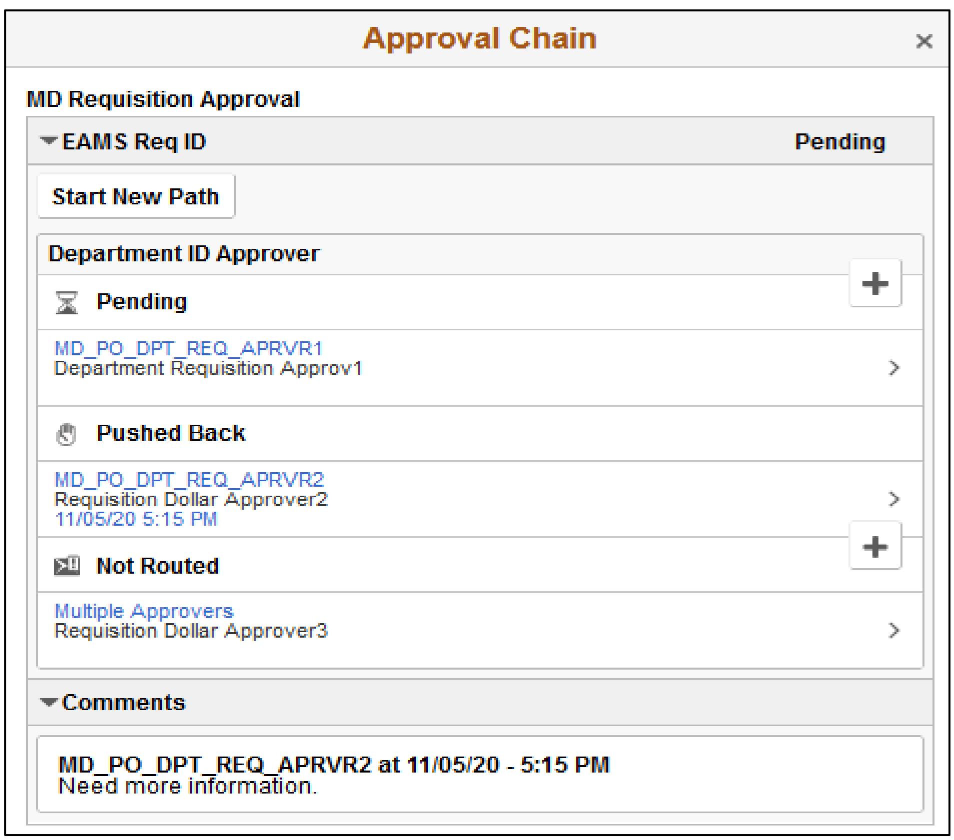
Lesson 2: Approving a Requisition

Lecture 3: Pushback a Requisition

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



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



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

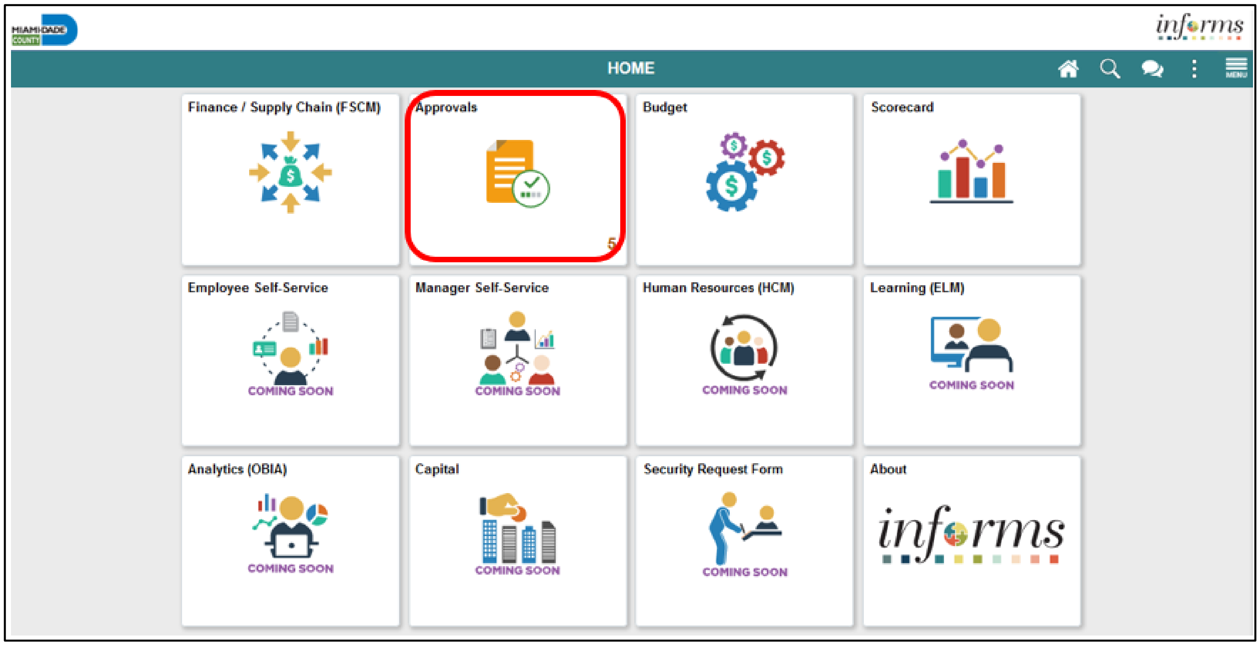
(True/False) The first, second, third, and or fourth approvers can use the pushback functionality.

Lesson 2: Approving a Requisition

Lecture 4: Hold a Requisition

Navigation to: **Approvals tile**

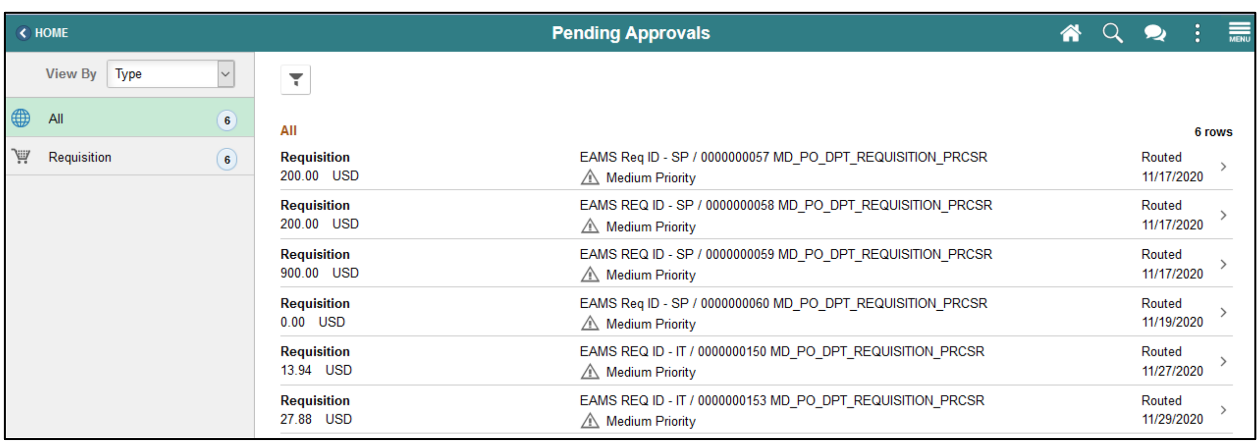
1. Login to INFORMS and select the **APPROVALS** tile.



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.

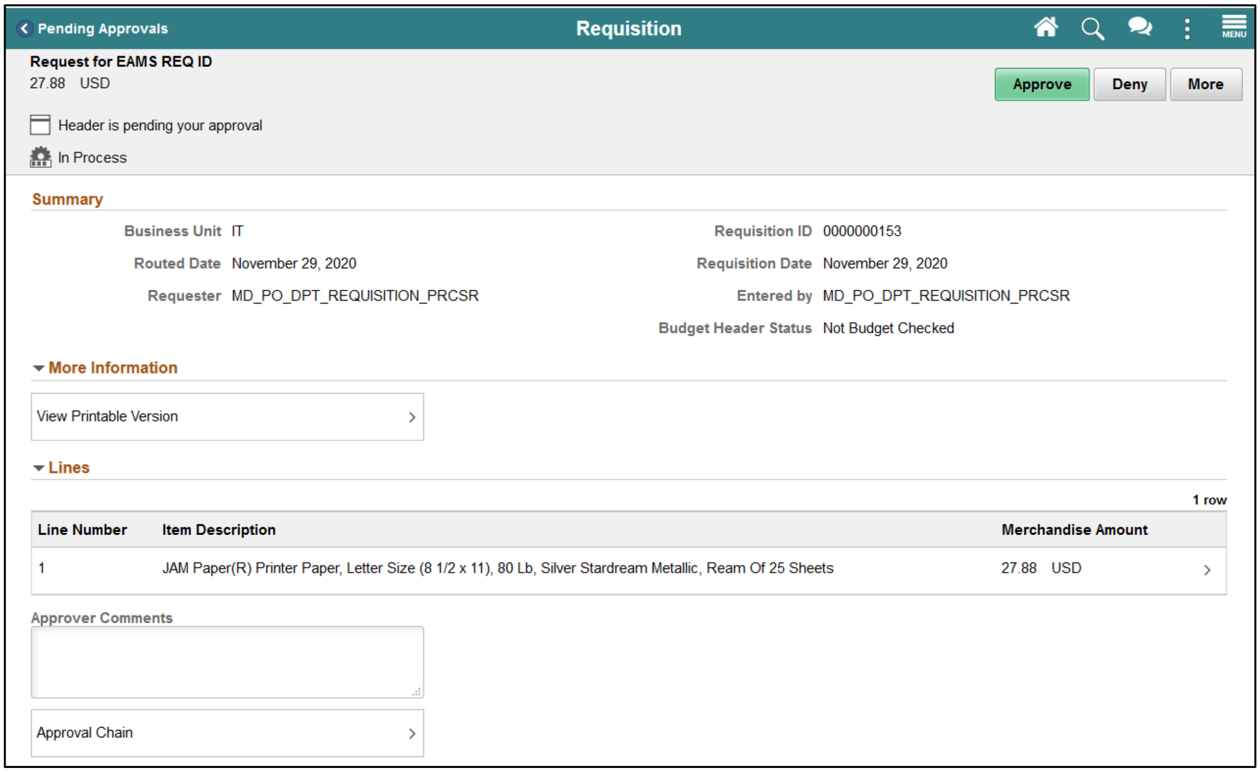


Lesson 2: Approving a Requisition

Lecture 4: Hold a Requisition

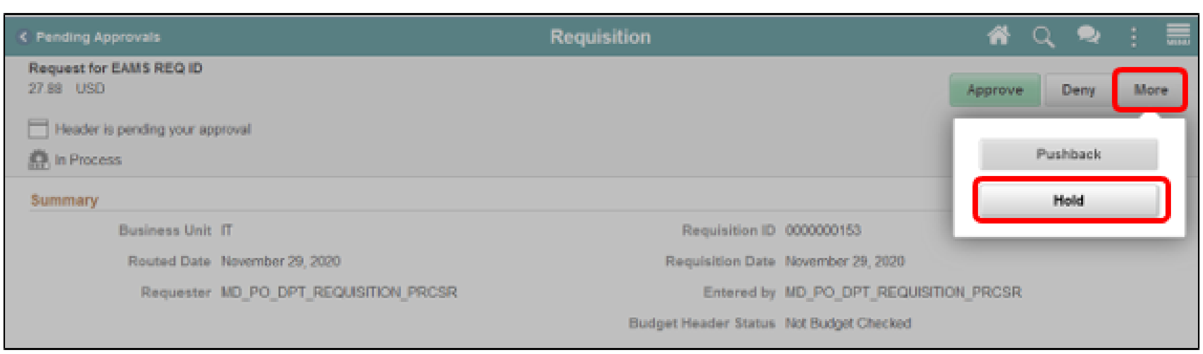
Requisition Header Approval Page: The requisition header approval page displays the requisition header, lines, and approver comments. **IMPORTANT!** Approvers should review all four layers of a requisition and comments/attachments before taking action.

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



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.



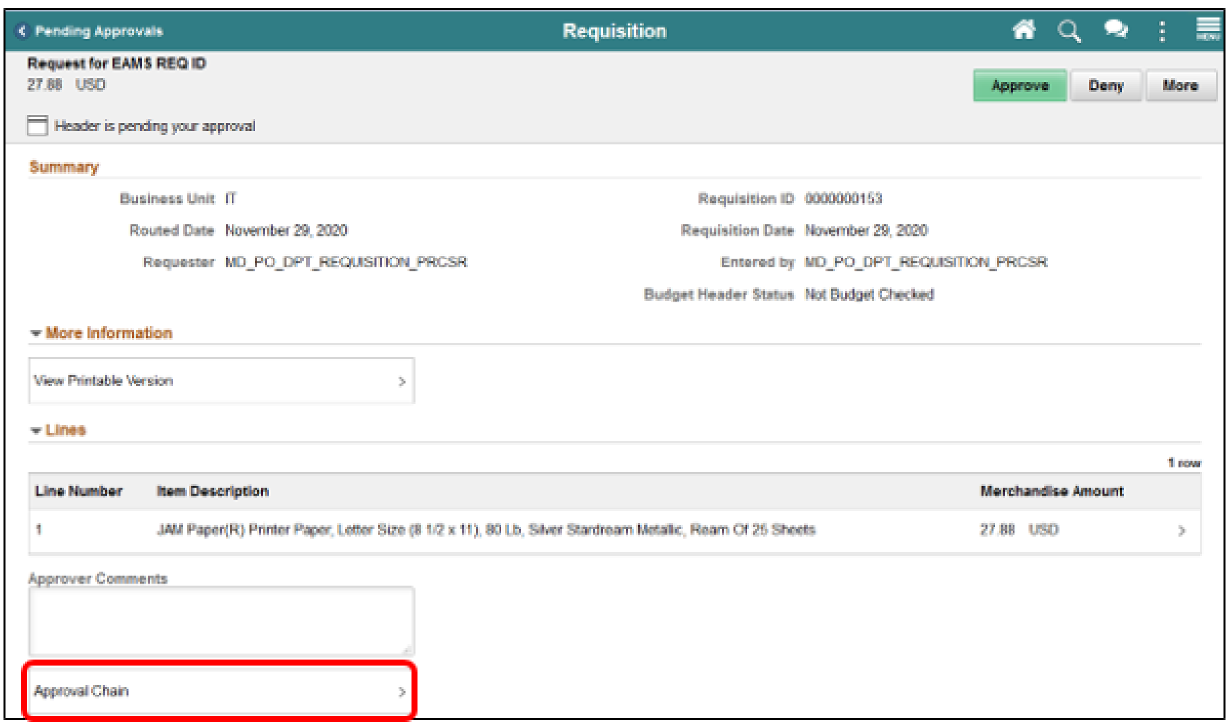
Lesson 2: Approving a Requisition

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.

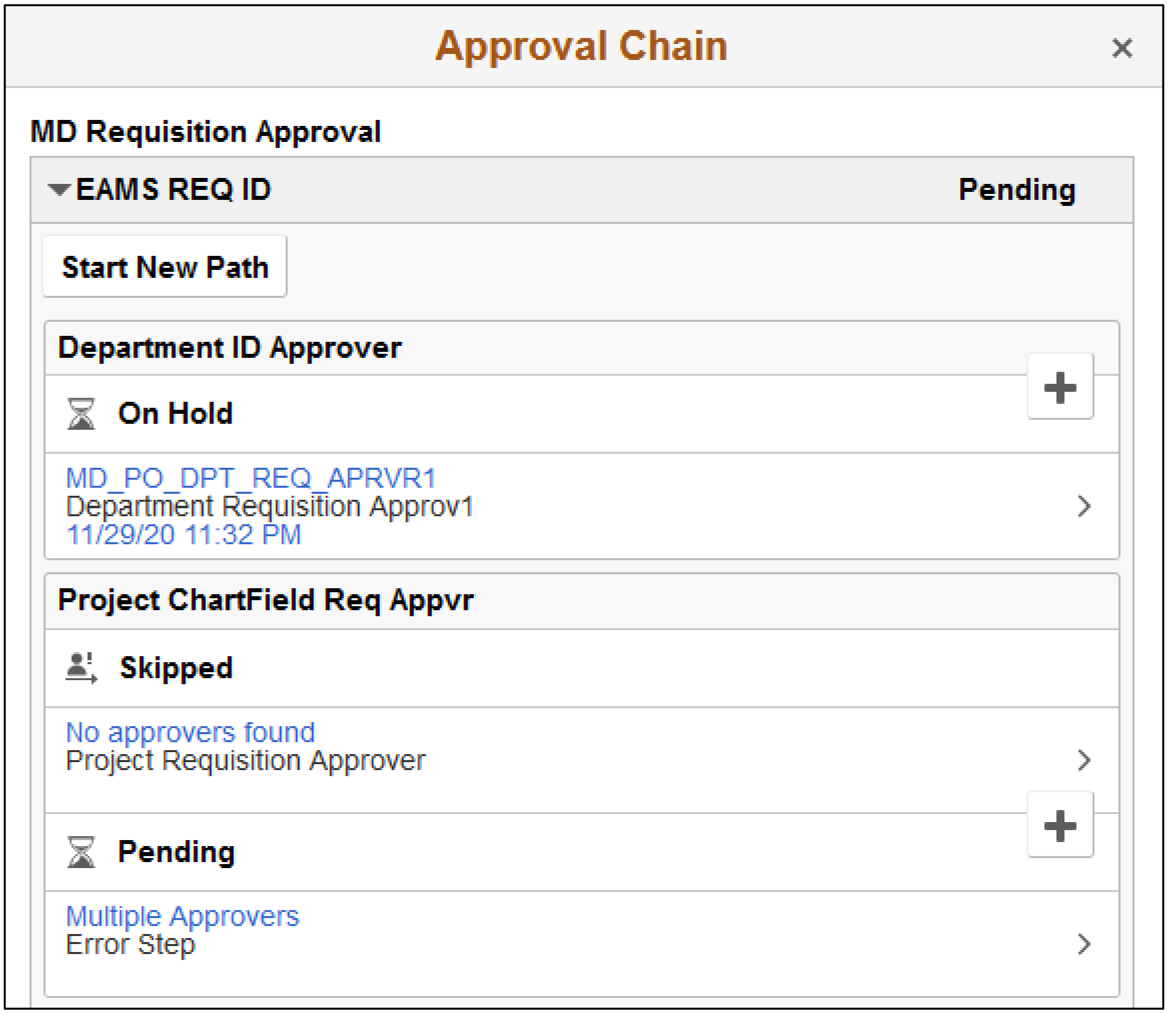
6. Select the **APPROVAL CHAIN** button. This action will display the approval chain page.



Lesson 2: Approving a Requisition

Lecture 4: Hold a Requisition

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



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.

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:

- Miamidade.gov/informs

Module 4: Course Summary

Key Terms

The following key terms are used in this course:

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

Module 4: Course Summary

Key Terms

The following key terms are used in this course:

Term	Definition
Manufacturer Item ID	Displays the EAMS Manufacturer ID. This field is required for the EAMS and INFORMS integration.
My Requisitions Page	Used to view or take action on requisitions created by the requisitioner.
National Institute of Government Purchasing (NIGP) Code	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.
Pending Approval Page	The Pending Approval Page displays pending requisition header information for the approver to review.
Product Details Page	The Product Details Page provides item attributes such as the product description and specifications.
Punchout	The process of leaving a requisition to access the County catalog to pull the items into a requisition for processing and sourcing to a PO
Requestor	A user that needs to procure goods or services.
Requisition Header Approval Page	The Requisition Header Approval Page displays the requisition header, lines, and approver comments.
Requisition ID	This field is a system generated number associated with a requisition.
Requisition Lines section	Also known as the “Line,” and the second layer of a requisition, the requisition lines section displays item details, adds functionality, and accesses the other requisition layers.
Requisition Lines	Also known as the "Line," and the second layer of a requisition, displays item details, adds functionality, and accesses the other requisition layers.
Requisition Name	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
Requisition Summary	Also known as the “Header” and the first layer of a requisition, the Requisition Summary displays default values from the requisitioner’s user profile (i.e., business unit, requestor, and currency).

Module 4: Course Summary

Key Terms

The following key terms are used in this course:

Term	Definition
Requisition	An internal INFORMS document for requesting goods and services. This is the formal transaction informing the purchasing department on what to order, how much to order and when the order is needed as well as other relevant information. Requisitions consist of these basic elements: headers, lines, schedules, and distributions. Each requisition has one header, which can have multiple lines. Each line can have multiple schedules. Each schedule can have multiple distributions. The schedule defines when and where users want the line items delivered. The distribution defines internal information for the schedule, such as how to charge accounts and departments for the purchase and how much of the total price each department should pay.
Requisitioner	A user that enters a requisition into INFORMS. Users with this role can create a requisition for themselves or on behalf of another Requestor within their department.
Save Confirmation Page	The Save confirmation Page is intended to enable the requisitioner to view a summary of the final requisition.
Schedule Detail Page	The Schedule Detail Page is the third layer of a requisition and it is used to review and modify schedule details for an item.
Search Results Page	The Search Results Page displays all items that met the search criteria.
Ship To	The department location where the supplier will ship the order.
Shopping Cart Page	The shopping cart page enables the requestor to review and update the shopping cart before proceeding to the checkout page.
Shopping Cart Page	Enables the requestor to review and update the shopping cart before proceeding to the checkout page.
Special Request	A method that allows requisitioners to enter item descriptions for goods or services that may not be active in the internal or external catalogs.
Supplier Item ID	Field will be used by certain departments to reflect EAMS Item ID
Templates	Allows requisitioners to group items together to simplify ordering.
Web Suppliers Page	The web suppliers page displays only those suppliers who have established a direct connection with Miami Dade County.