

Miami-Dade County



End User Training Resource Guide

Course Code: SCM 201

Course Title: Manage and Record Requisitions

Updated 05-08-2025

Revision History

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

Guide Overview

Guide Description

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

This guide consists of the following modules:

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



Table of Contents	
Content	Page

Module 1: Introduction	5
Module 2: <Module Name>	16
○ Lesson 1: <Lesson Name>	17
○ Lesson 2: <Lesson Name>	40
Module 3: Guide Summary	93

Module 1: Introduction

Topics

This module covers the following topics:

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

Module 1: Introduction

Learning Objectives

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

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

Module 1: Introduction

Audience:

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

Roles and

Responsibilities

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

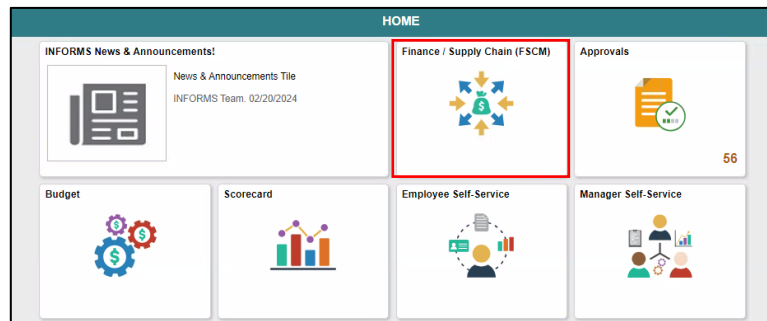
Module 1: Introduction

Navigation

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

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

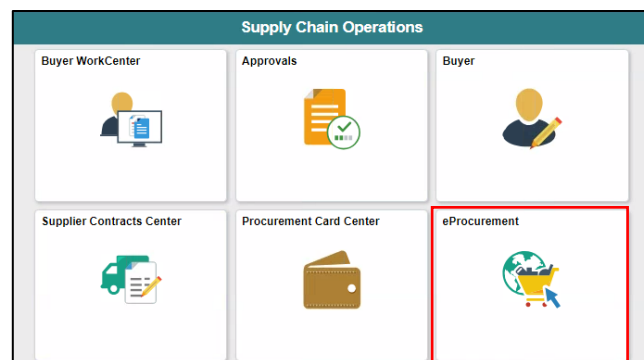
1. Login into **INFORMS** and select the **FINANCE/SUPPLY CHAIN (FSCM)** tile.



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



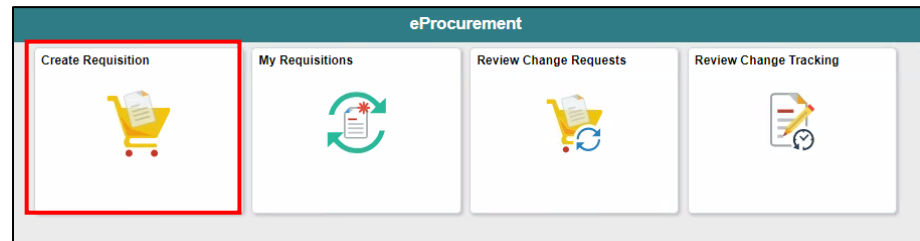
3. Select the **eProcurement** tile from the Supply Chain Operations page.



Module 1: Introduction

Navigation

4. Select the **Create Requisition** tile from the eProcurement page. 5.



Module 1: Introduction

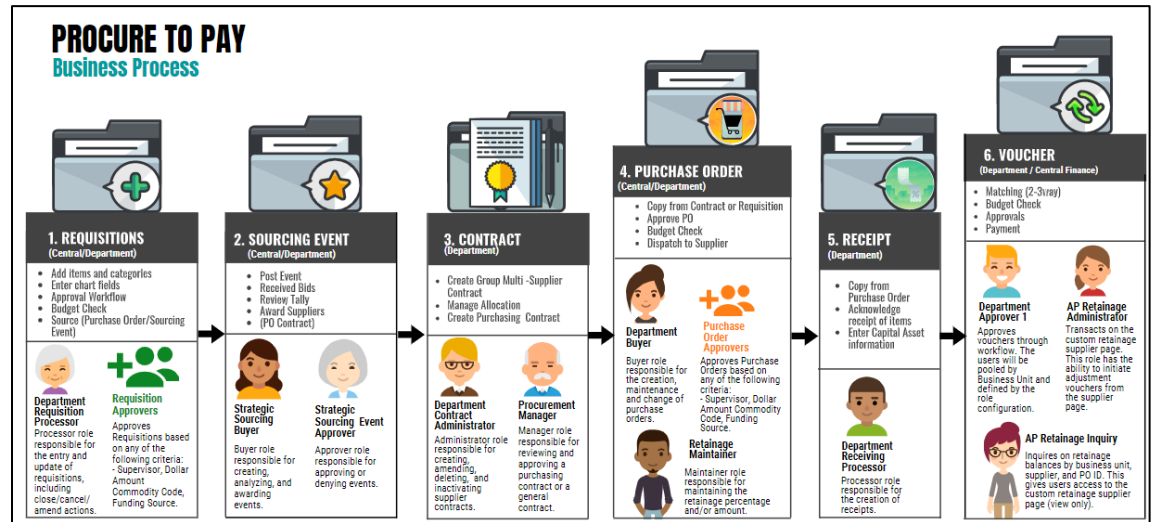
Purpose and Benefits

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

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

Module 1: Introduction

The End-to-End Business Process



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

Note: There are additional steps not included below that will be addressed in other training material (e.g., Items, Suppliers):

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

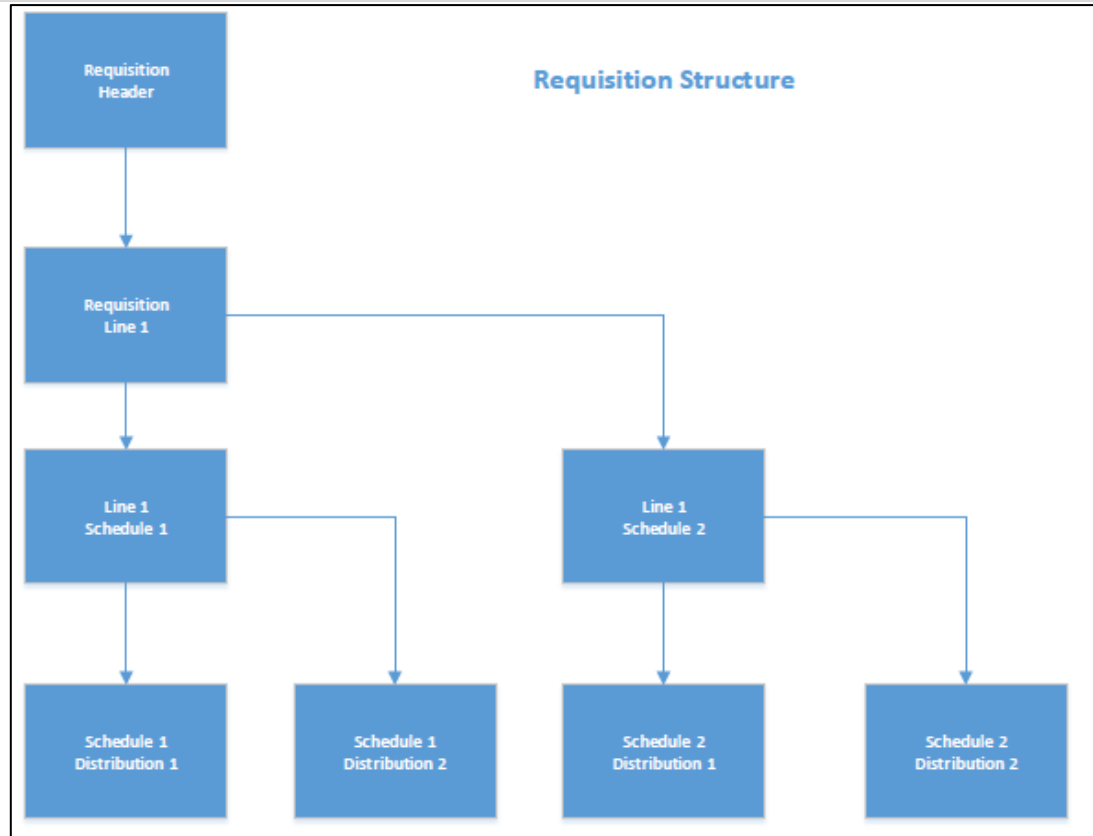
Module 1: Introduction

The End-to-End Business Process

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

Module 1: Introduction

The End-to-End Business Process

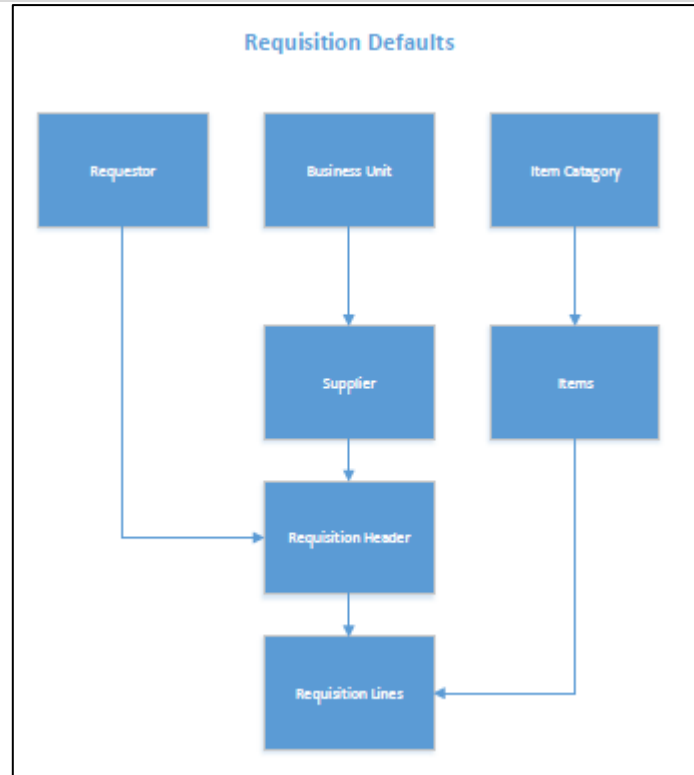


Requisition Structure

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

Module 1: Introduction

The End-to-End Business Process



Requisition Defaults

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

Examples of field defaults include:

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

Module 1: Introduction

Module 1: Introduction Summary

The following key concepts were covered in this module:

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

Module 2: Manage and Record Requisitions

Module 2:
Course
Introduction
Summary

This module includes the following lessons:

- Lesson 1 – Create a Requisition

Lesson 1: Create a Requisition

Lesson 1: Overview

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

- Select an Item
- Create a Special Request

Lesson 1 Create a Requisition

Lesson 1: Introduction

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

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

Lesson 1: Create a Requisition

Key Terms



The following key terms are used in this lesson:

Term	Definition
Attention To	The person to whom the goods/services are to be delivered.
Business Unit	Business Units are defined for each entity and used to maintain and report on transactional data.
Catalog	Displays all active NIGP items that can be selected to add to a requisition.
Category	Classifies asset by type for accounting entry and reporting.
ChartField	A term to represent the chart of accounts. Sometimes the term is used by the INFORMS team to reference a specific field within the chart of accounts (i.e., Fund, Account, Dept ID).
Checkout Page	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 streamlined online template.
Favorites	A user's personal list of navigation shortcuts.

Lesson 1: Create a Requisition

Key Terms



The following key terms are used in this lesson:

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

Lesson 1: Create a Requisition

Key Terms



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Lesson 1: Create a Requisition

Key Terms



The following key terms are used in this lesson:

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

Lesson 1: Create a Requisition

Key Terms



The following key terms are used in this lesson:

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

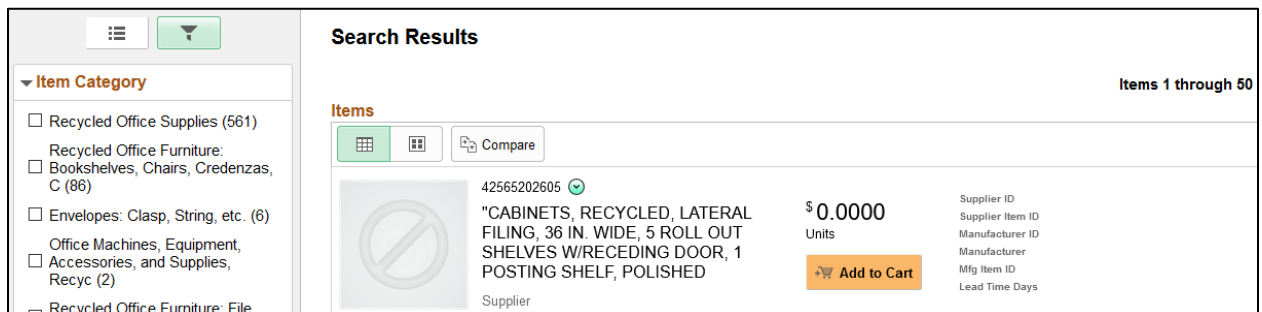
Lesson 1: Create a Requisition

Lecture 1: Selecting an Item

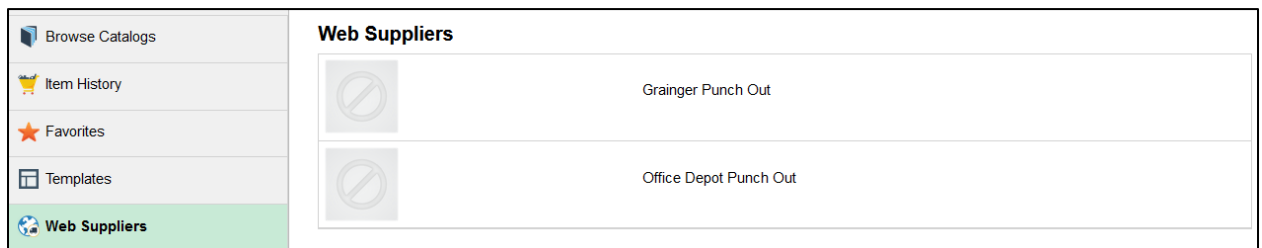
Selecting an Item:

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

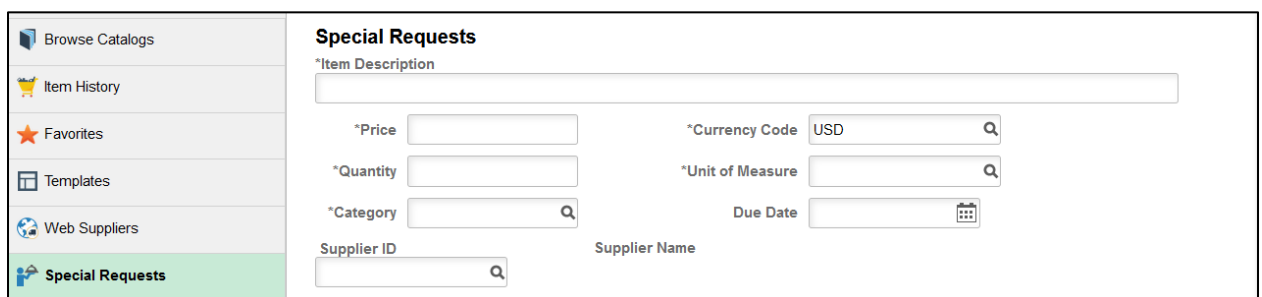
Catalogs – This is a method that consists of an internal catalog that Miami-Dade County has configured of active items (NIGP 7 to 11-Digits) and item categories (NIGP 5-digits) that are available to all business units. Specific item categories may require additional catalogs, and access is limited to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



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



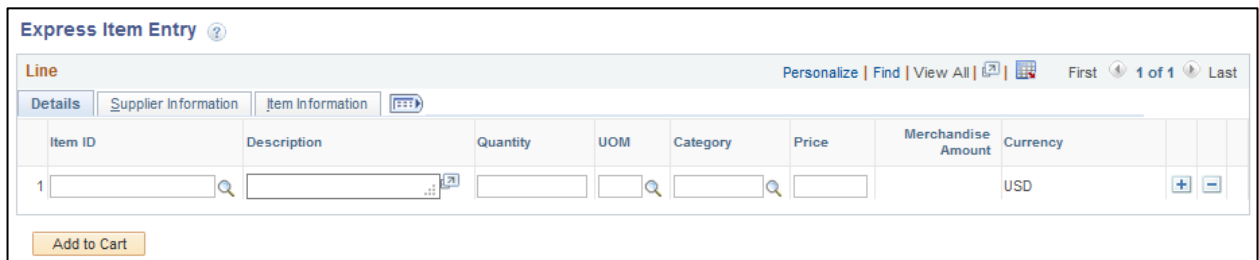
Special Request – This is a method to allow requisitioners to enter item descriptions for goods or services that are unavailable in internal or external catalogs.



Lesson 1: Create a Requisition


Lecture 2: Creating a Requisition from the Master Item Catalog


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





The Express Item Entry form is a streamlined online template for adding items to a requisition. It features a header bar with 'Express Item Entry' and a help icon. Below the header is a 'Line' section with tabs for 'Details', 'Supplier Information', 'Item Information', and 'Item ID'. The main form area contains fields for 'Item ID', 'Description', 'Quantity', 'UOM', 'Category', 'Price', 'Merchandise Amount', and 'Currency'. A '1' is entered in the 'Item ID' field. Below the form is an 'Add to Cart' button.


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


 Browse Catalogs


 Item History

 Favorites

 Templates


 Web Suppliers


 Special Requests


 Fixed Cost Service


Favorites















Favorites4 rows

 Add


 Add to Template(s)


 Delete Selected





<input type="checkbox"/>	Item Description 	Supplier Name 	Price 	Currency 	UOM 	Quantity 	
<input type="checkbox"/>	<div></div> <div>AUTOMOBILE, GAS/ELECTRIC, PLUG-IN HYBRID, COMPACT SEDAN</div>	W W Grainger Inc.	1.00	USD	EA	<input type="text"/>	<div><div> Add</div><div> Delete</div><div></div></div>
<input type="checkbox"/>	<div></div> <div>TEST TEST TEST</div>	FLORIDA INTERNATIONAL UNIVERSITY	500.00	USD	EA	<input type="text"/>	<div><div> Add</div><div> Delete</div><div></div></div>


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


 Browse Catalogs

 Item History

 Favorites




 Templates

 Web Suppliers

 Special Requests

Templates

Company Templates

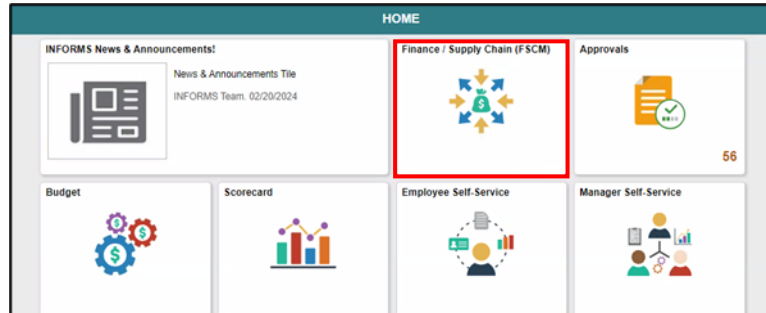
Description	Quantity
Purchasing Kit Test	<div><input type="text"/></div> <div> Add</div> <div>></div>
Cycle 5	<div><input type="text"/></div> <div> Add</div> <div>></div>
Cycle 3	<div><input type="text"/></div> <div> Add</div> <div>></div>

Lesson 1: Create a Requisition

Lecture 2: Creating a Special Request

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

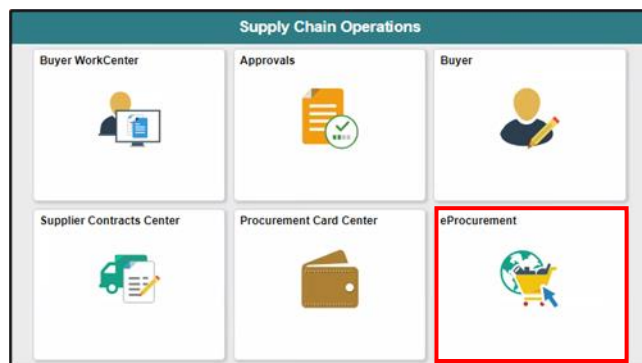
1. Login into **INFORMS** and select the **FINANCE/SUPPLY CHAIN (FSCM)**.



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



3. Select the **ePROCUREMENT** tile.



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

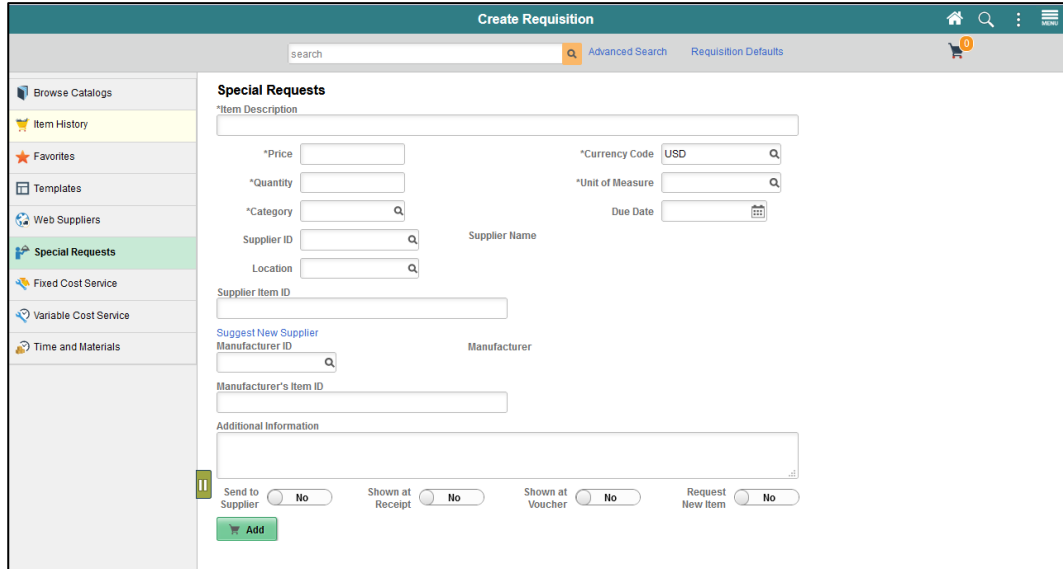


Lesson 1: Create a Requisition

Lecture 2: Creating a Special Request

Special Requests

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



The screenshot shows the 'Create Requisition' interface with the 'Special Requests' tab selected. The form contains the following fields and controls:

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

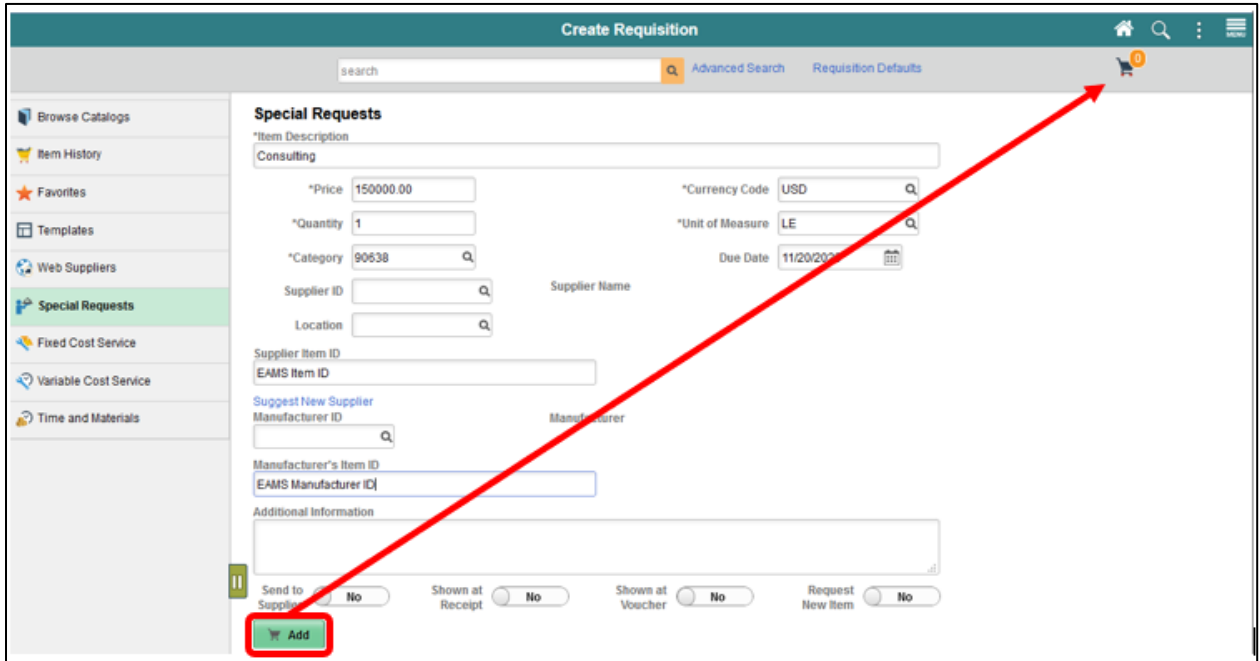
Common fields used in a special request:

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

Lesson 1: Create a Requisition

Lecture 2: Creating a Special Request

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



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

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

At the bottom of the form, there are four toggle switches: 'Send to Supplier' (No), 'Shown at Receipt' (No), 'Shown at Voucher' (No), and 'Request New Item' (No). A red box highlights the 'Add' button at the bottom left. A red arrow points from the 'Add' button to the shopping cart icon in the top right corner, which has a red circle with the number '0' next to it.

Lesson 1: Create a Requisition

Lecture 2: Creating a Special Request

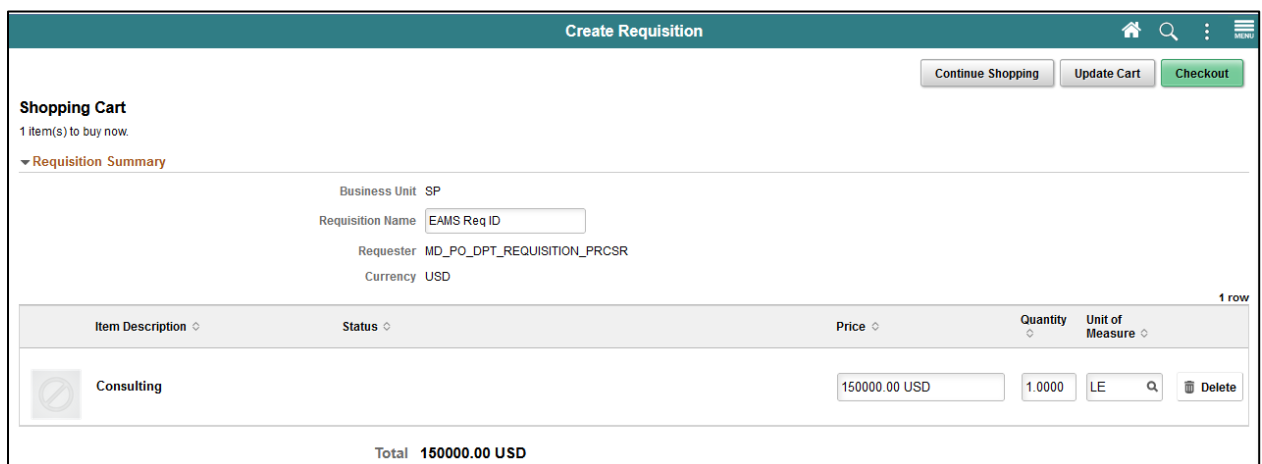
Shopping Cart Page

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

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

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

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





Create Requisition

Continue Shopping Update Cart Checkout

Shopping Cart
1 item(s) to buy now.

▼ Requisition Summary

Business Unit SP
Requisition Name EAMS Req ID
Requester MD_PO_DPT_REQUISITION_PRCR
Currency USD

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

Total 150000.00 USD

Lesson 1: Create a Requisition

Lecture 2: Creating a Special Request

Checkout Page

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

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

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



Lesson 1: Create a Requisition

Lecture 2: Creating a Special Request

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

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



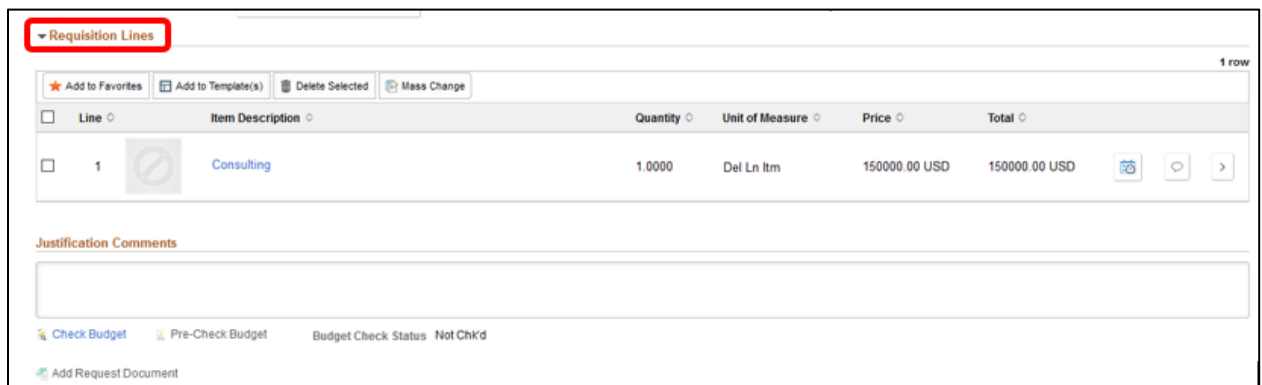
The dialog box has a title bar with 'Cancel' and 'Done' buttons. It contains a 'Comments' section with a text area for 'Comment Text' and three toggle buttons: 'Send to Supplier' (No), 'Show at Receipt' (No), and 'Show at Voucher' (No). Below this is an 'Add Attachment' button. The 'Attachments' section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

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

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

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

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



The 'Requisition Lines' section is highlighted with a red box. It shows a table with 1 row:

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

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

Lesson 1: Create a Requisition

Lecture 2: Creating a Special Request

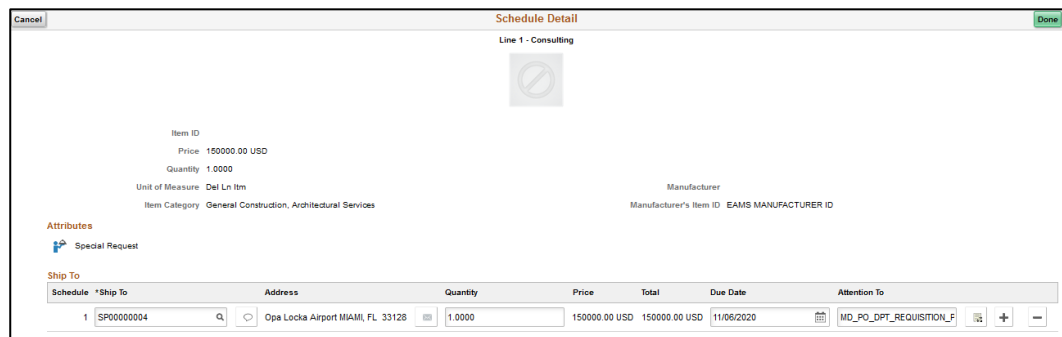
Schedule Detail Page

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

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

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

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



Distribution Page

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

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

13. Select the **CHARTFIELD2** tab.



Lesson 1: Create a Requisition

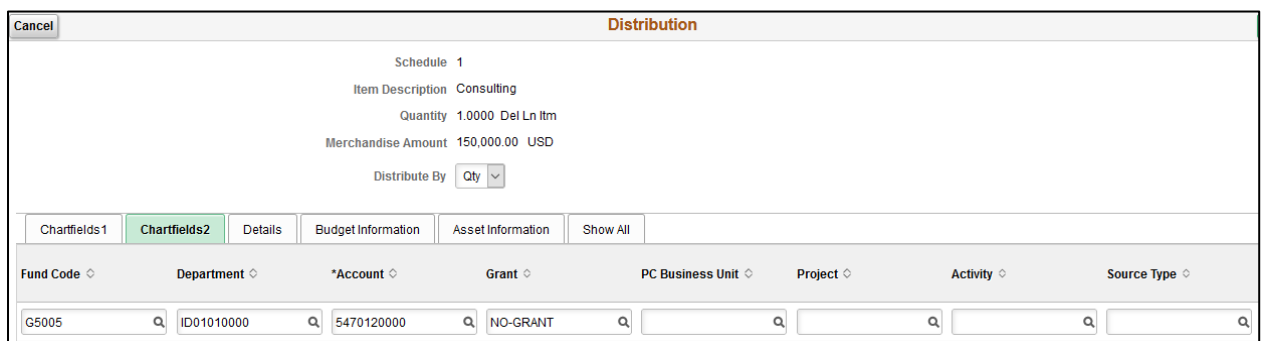
Lecture 2: Creating a Special Request

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

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

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

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



Cancel Distribution

Schedule 1

Item Description Consulting

Quantity 1.0000 Del Ln Itm

Merchandise Amount 150,000.00 USD

Distribute By Qty

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

Fund Code Department *Account Grant PC Business Unit Project Activity Source Type

G5005 ID01010000 5470120000 NO-GRANT

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

The system then returns to the Checkout page.

Lesson 1: Create a Requisition

Lecture 2: Creating a Special Request

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

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

Create Requisition

Continue Shopping Save Submit





Checkout Order Total 150000.00 USD

Requisition Summary



Business Unit SP
 Requisition Name EAMS Req ID
 Priority Medium
 Header Comments/Attachments
 Requester MD_PO_DPT_REQUISITION_PRCR
 Currency USD


Requisition Lines 1 row

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

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

Justification Comments

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

 Add Request Document

Lesson 1: Create a Requisition

Lecture 2: Creating a Special Request

Line Details Page

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

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

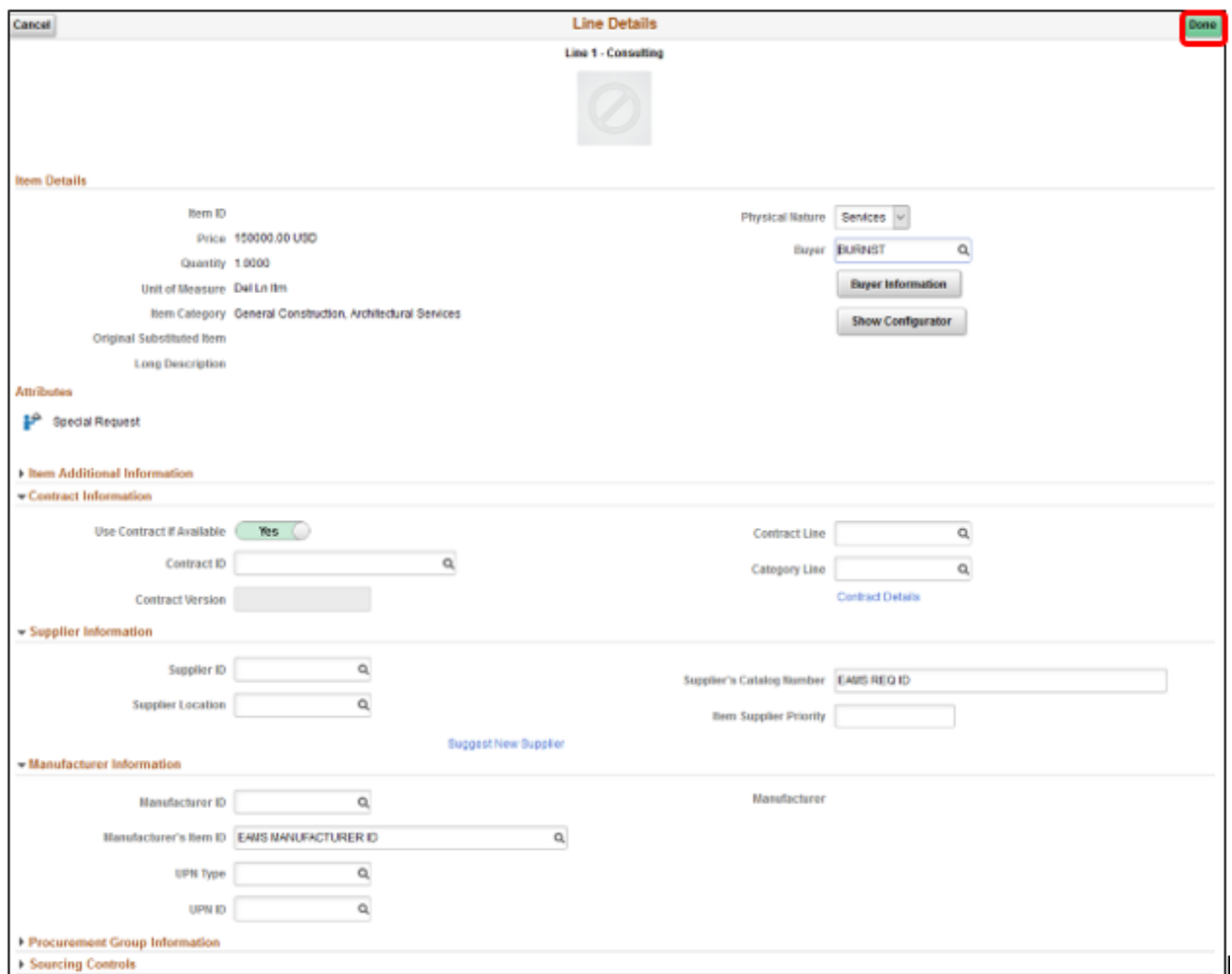
Note: Several departments use this field (e.g., Transit) to reflect the **EAMS Requisition ID**. This field is required for EAMS and INFORMS integration.

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

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

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

The system then routes to the Checkout page.



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

- Item Details:** Includes fields for Item ID, Price (150000.00 USD), Quantity (1.0000), Unit of Measure (Dbl Ln Item), Item Category (General Construction, Architectural Services), Original Substituted Item, and Long Description. It also has a 'Physical Nature' dropdown set to 'Services' and a 'Buyer' field with 'BURRST' entered. Buttons for 'Buyer Information' and 'Show Configurator' are present.
- Attributes:** Includes a 'Special Request' icon and text.
- Item Additional Information:** Includes a 'Contract Information' section with a toggle for 'Use Contract # Available' set to 'Yes', and fields for 'Contract ID', 'Contract Version', 'Contract Line', and 'Category Line'. A 'Contract Details' link is also visible.
- Supplier Information:** Includes fields for 'Supplier ID', 'Supplier Location', 'Supplier's Catalog Number' (containing 'EAMS REQ ID'), and 'Item Supplier Priority'. A 'Suggest New Supplier' link is also present.
- Manufacturer Information:** Includes fields for 'Manufacturer ID', 'Manufacturer's Item ID' (containing 'EAMS MANUFACTURER ID'), 'UPN Type', and 'UPN ID'. A 'Manufacturer' label is also visible.
- Procurement Group Information** and **Sourcing Controls** sections are partially visible at the bottom.

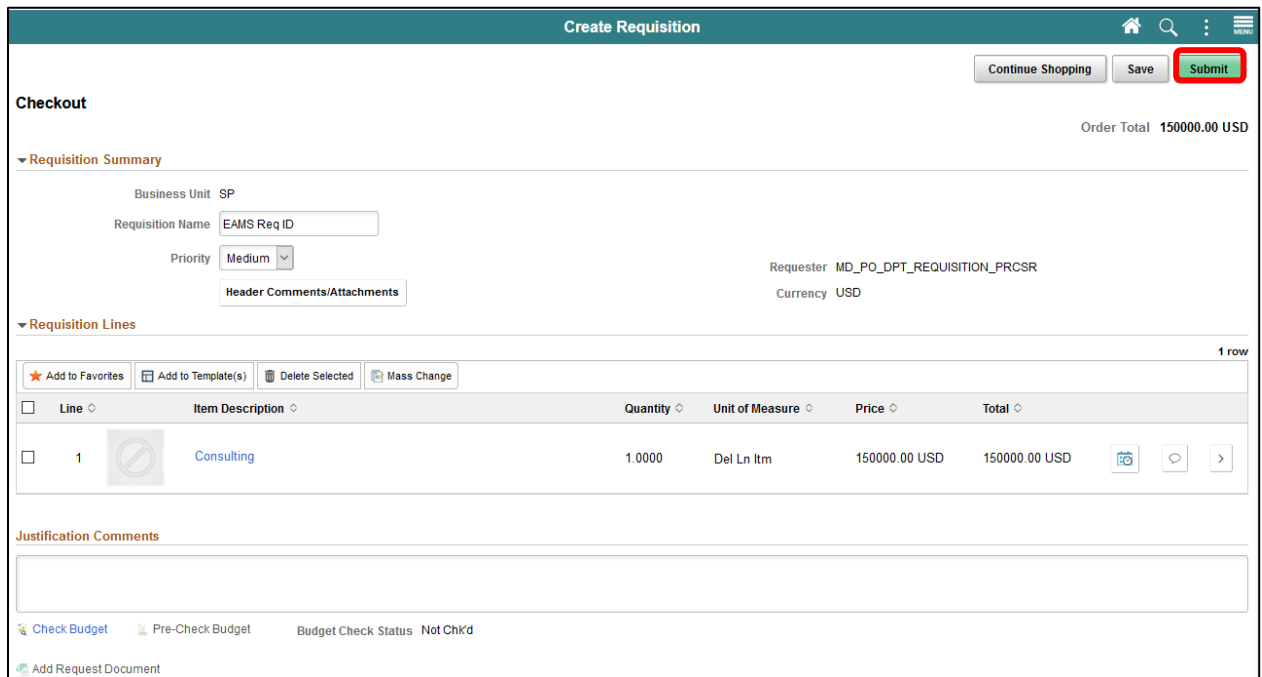
A red box highlights the 'Done' button in the top right corner of the page.

Lesson 1: Create a Requisition

Lecture 2: Creating a Special Request

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

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



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

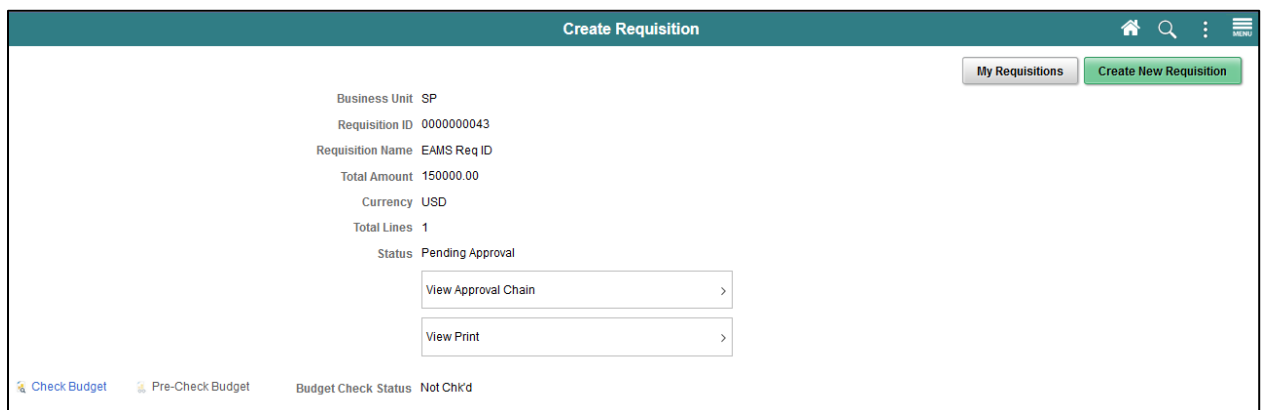
- Checkout** (Order Total: 150000.00 USD)
- Requisition Summary**
 - Business Unit: SP
 - Requisition Name: EAMS Req ID
 - Priority: Medium
 - Requester: MD_PO_DPT_REQUISITION_PRCR
 - Currency: USD
 - Header Comments/Attachments
- Requisition Lines** (1 row)

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

Save Confirmation Page

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

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



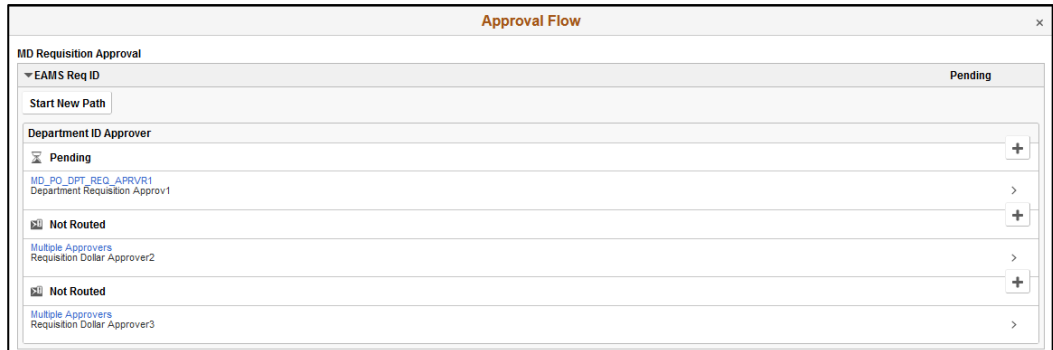
The screenshot shows the 'Create Requisition' page with the 'Save Confirmation' section. The page displays the following information:

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

Lesson 1: Create a Requisition

Lecture 2: Creating a Special Request

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



The screenshot displays the "MD Requisition Approval" workflow interface. At the top, the title "MD Requisition Approval" is shown, followed by a sub-header "EAMS Req ID" and a status indicator "Pending". Below this, a "Start New Path" button is visible. The main section of the interface is a table with three rows, each representing a different approval step. The first row is labeled "Department ID Approver" and shows a "Pending" status with a plus icon. The second row is labeled "MD_PO_DPT_REQ_APPROV1" and shows a "Not Routed" status with a plus icon. The third row is labeled "Multiple Approvers Requisition Dollar Approver2" and shows a "Not Routed" status with a plus icon. The fourth row is labeled "Multiple Approvers Requisition Dollar Approver3" and shows a "Not Routed" status with a plus icon. The interface is designed to track the approval process for requisitions, allowing users to view the status of each step and initiate new paths.

MD Requisition Approval	
EAMS Req ID	Pending
Start New Path	
Department ID Approver	Pending
MD_PO_DPT_REQ_APPROV1 Department Requisition Approv1	Not Routed
Multiple Approvers Requisition Dollar Approver2	Not Routed
Multiple Approvers Requisition Dollar Approver3	Not Routed

Lesson 1: Lesson Summary

Lesson Summary



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

- Select an Item
- Create a Special Request

Lesson 2: Manage a Requisition

Lesson 1: Overview

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

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

Lesson 2: Manage a Requisition

Lesson 1: Introduction

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

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

Lesson 2: Manage a Requisition

Key Terms



The following key terms are used in this lesson:

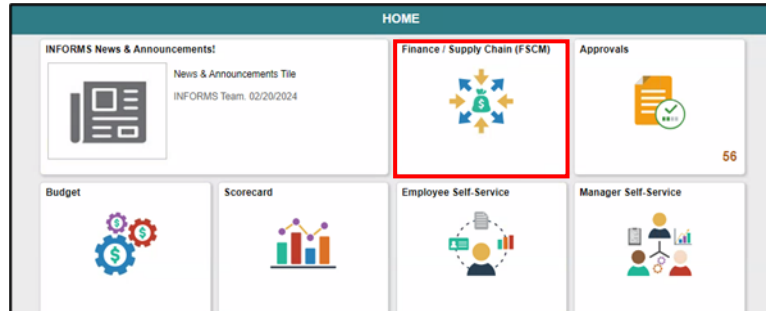
Term	Definition
Checkout Page	The last step before submitting a requisition for approval.
Distribution Page	The Distribution Page is the fourth layer of a requisition used to enter accounting information (ChartFields).
Edit Requisition Page	The Edit Requisition Page enables the requisitioner to make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

Lesson 2: Manage a Requisition

Lecture 1: Copy a Requisition

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

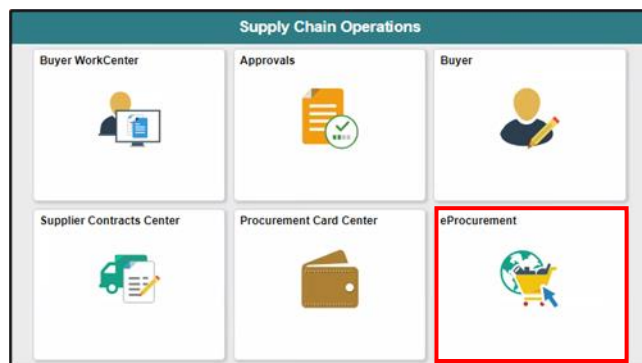
1. Login into **INFORMS** and select the **FINANCE/SUPPLY CHAIN (FSCM)**.



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



3. Select the **ePROCUREMENT** tile.



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



Lesson 2: Manage a Requisition

Lecture 1: Copy a Requisition

Common Elements Used in My Requisition

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

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

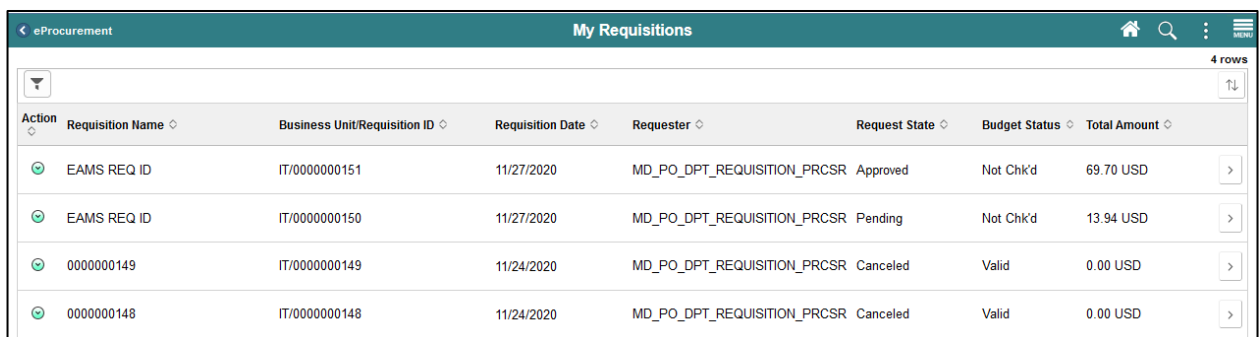
The **VIEW DETAILS** button is used for the Line Details page.

My Requisitions Page

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

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

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



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

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



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

Lesson 2: Manage a Requisition

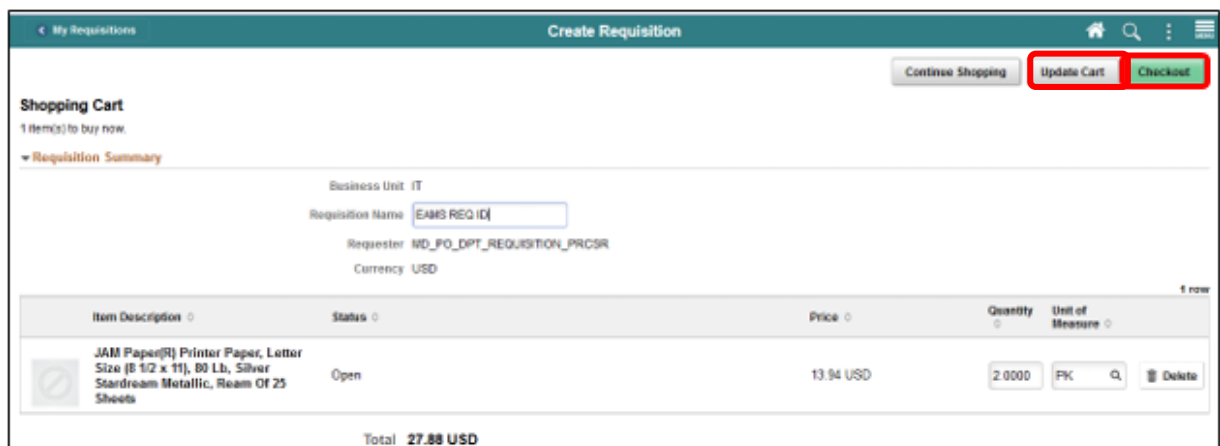
Lecture 1: Copy a Requisition

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

Shopping Cart Page

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

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



Item Description	Status	Price	Quantity	Unit of Measure
JAM Paper(R) Printer Paper, Letter Size (8 1/2 x 11), 80 Lb, Silver Stardream Metallic, Ream Of 25 Sheets	Open	13.94 USD	2.0000	PK

Total 27.88 USD

Lesson 2: Manage a Requisition

Lecture 1: Copy a Requisition

Checkout Page

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

1. Verify the **REQUISITION NAME** field. The requisitioner should reflect a description that makes it easier for the approver to identify.
2. Select the **PRIORITY** value. The approver has visibility to the priority field on the approver page.
 - Low
 - Medium (system default)
 - High
3. Select the **HEADER COMMENTS/ATTACHMENTS** button. This functionality is available to enter comment text and add attachments.

Note: The requisitioner may need to attach market research if the item is not on an existing contract. The buyer or procurement officer uses the attached market research (i.e., pictures and item specifications) to source the requisition.

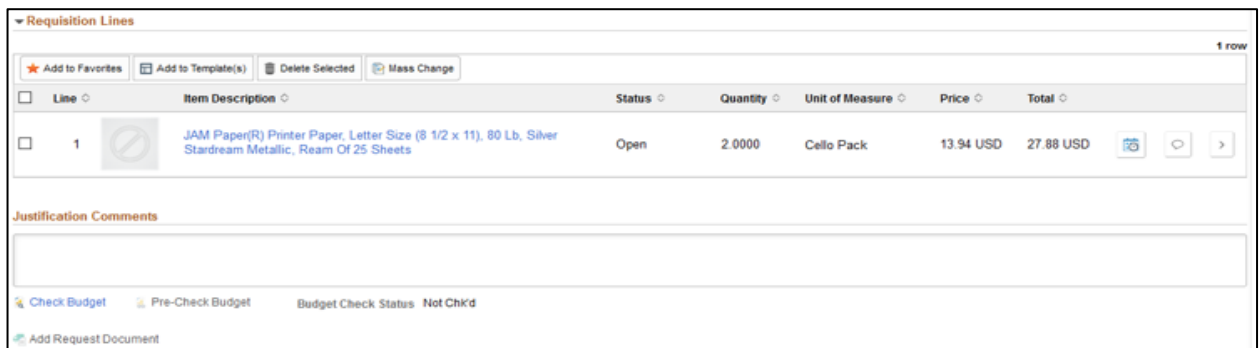


Lesson 2: Manage a Requisition

Lecture 1: Copy a Requisition

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

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

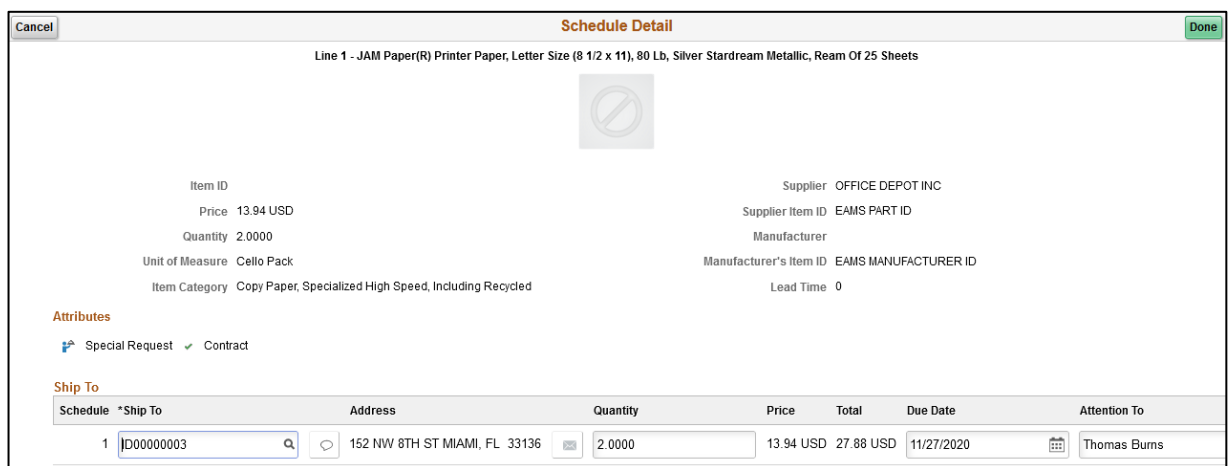


Schedule Detail Page: The Schedule Page is the third layer of a requisition, and it is used to review or modify schedule details for an item.

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

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

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



Schedule	*Ship To	Address	Quantity	Price	Total	Due Date	Attention To
1	ID00000003	152 NW 8TH ST MIAMI, FL 33136	2.0000	13.94 USD	27.88 USD	11/27/2020	Thomas Burns

Lesson 2: Manage a Requisition

Lecture 1: Copy a Requisition

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

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

22. Select your **GL BUSINESS UNIT**.

23. Select the **CHARTFIELD2** tab.



Distribution Line	Status	Dist Type	Location	Quantity	Open Qty	Percent	Merchandise Amount	GL Business Unit
1	Open		ID00000003	2,000	2,000	100.0000	27.88	MOADE

24. Select the **FUND CODE** value.

25. Select the **DEPARTMENT** value.

26. Select the **ACCOUNT** value.

27. Select the **GRANT** value.

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

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

28. Select the **PC BUSINESS UNIT** value. This field should reflect the business unit of the requestor.

29. Select the **PROJECT** value. The project value is created in the project costing module.

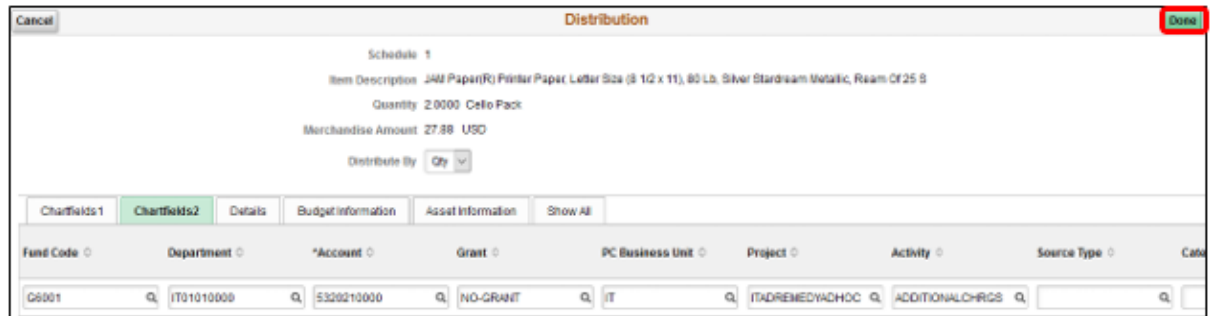
30. Select the **ACTIVITY** value. The activity value represents a subtask of a project (i.e., Planning, Design), and the value is created in the project costing module.

31. Select the **SOURCE TYPE** value. The source type field should only be selected when a project is GOB funded.

Lesson 2: Manage a Requisition

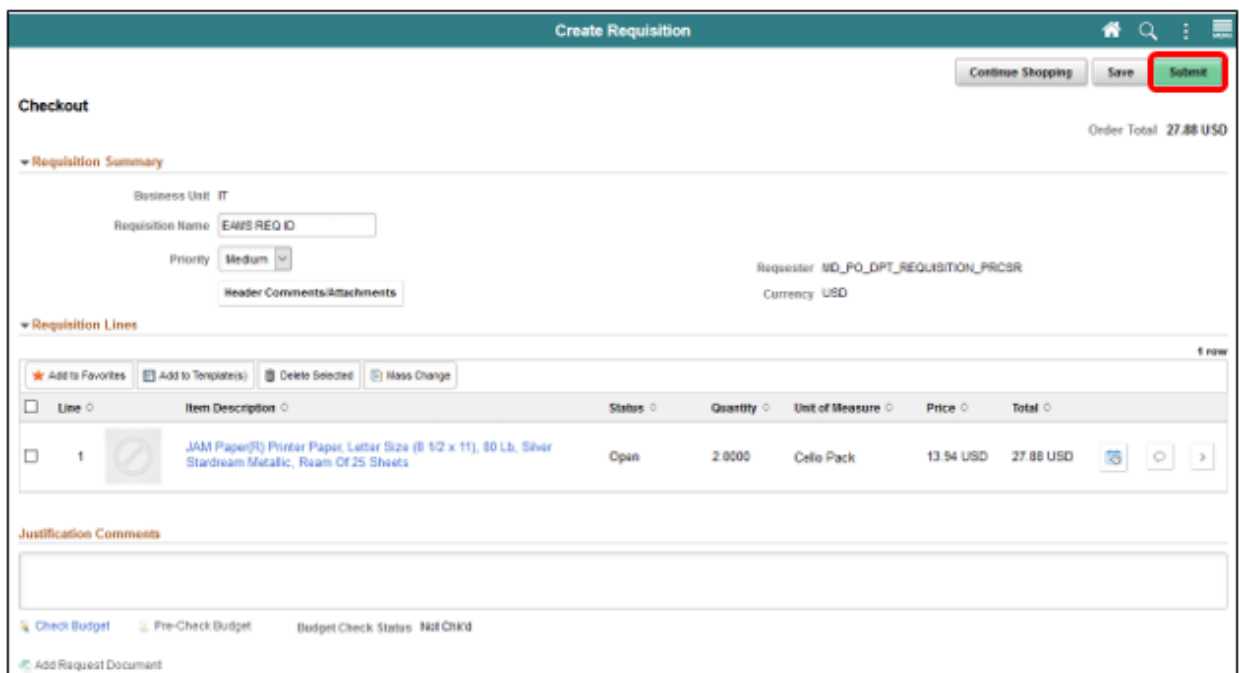
Lecture 1: Copy a Requisition

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



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

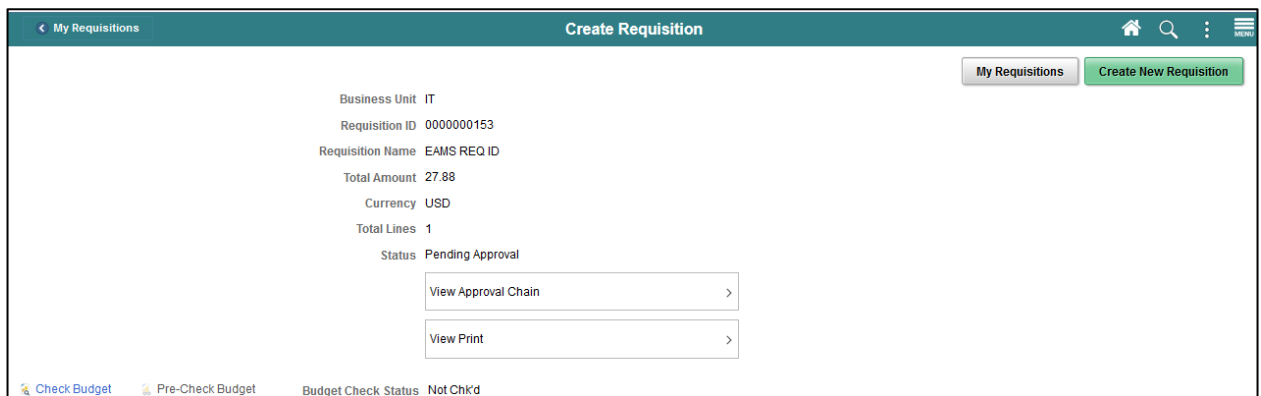
33. Select the **SUBMIT** button. The system then routes to the Save Confirmation page.



Lesson 2: Manage a Requisition

Lecture 1: Copy a Requisition

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



[My Requisitions](#) **Create Requisition** [Home](#) [Search](#) [Menu](#)

[My Requisitions](#) [Create New Requisition](#)

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

[View Approval Chain](#) >
[View Print](#) >

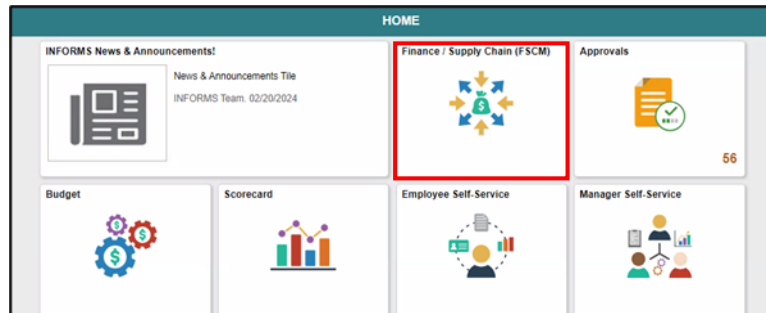
[Check Budget](#) [Pre-Check Budget](#) Budget Check Status Not Chk'd

Lesson 2: Manage a Requisition

Lecture 2: Edit a Requisition

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

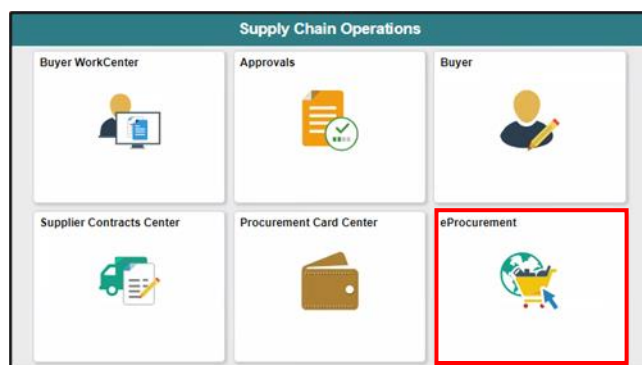
1. Login into **INFORMS** and select the **FINANCE/SUPPLY CHAIN (FSCM)**.



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



3. Select the **ePROCUREMENT** tile.



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



Lesson 2: Manage a Requisition

Lecture 2: Edit a Requisition

Common Elements Used in My Requisition:

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

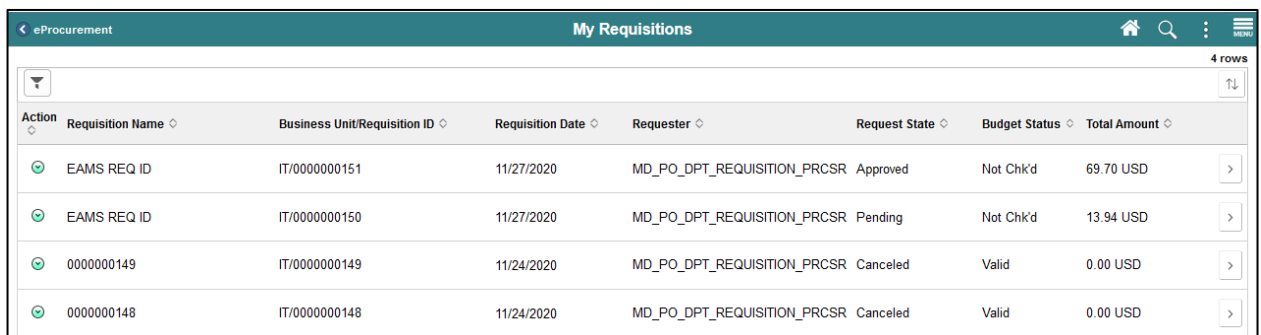
- Details
- Copy
- View Print
- Budget Check
- Edit

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

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

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

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



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

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

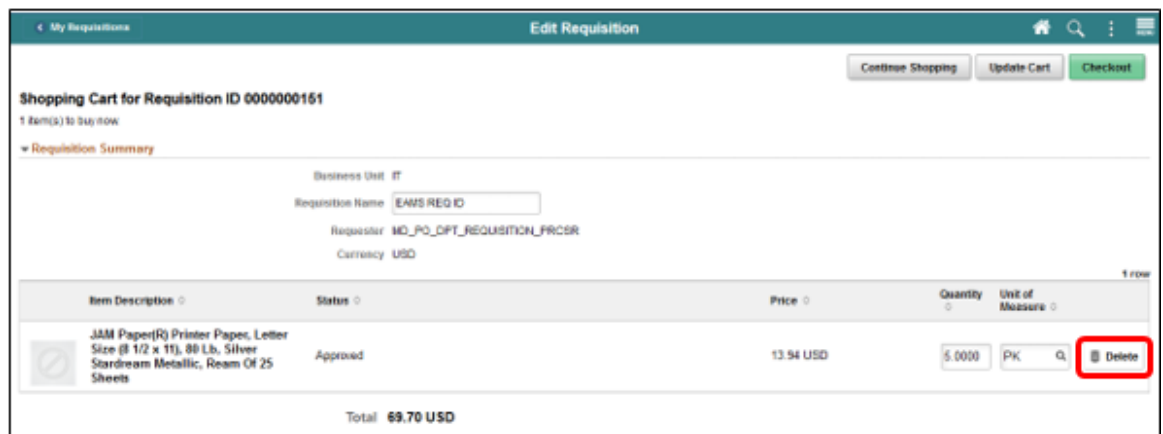


Lesson 2: Manage a Requisition

Lecture 2: Edit a Requisition

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

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



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

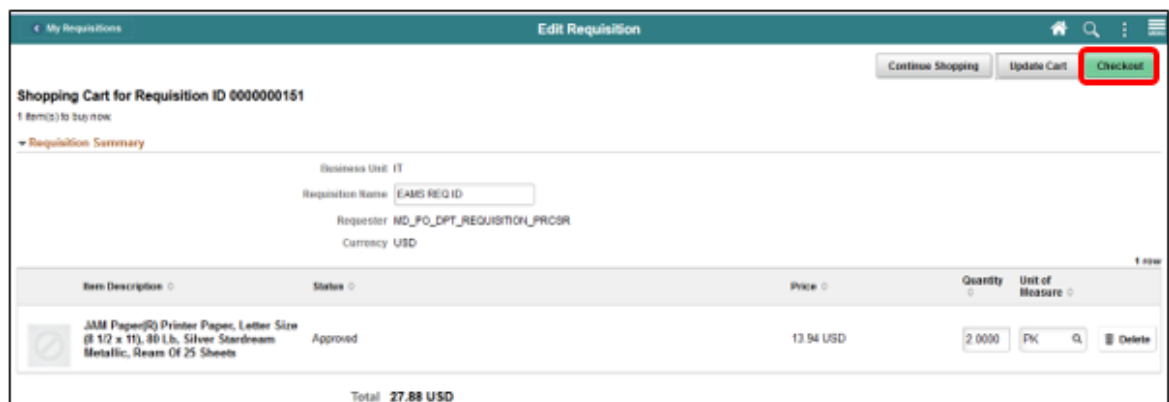
Requisition Summary

Business Unit: IT
Requisition Name: EAMS REQ ID
Requester: MD_PO_DPT_REQUISITION_PRCSR
Currency: USD

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

Total: 69.70 USD

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



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

Requisition Summary

Business Unit: IT
Requisition Name: EAMS REQ ID
Requester: MD_PO_DPT_REQUISITION_PRCSR
Currency: USD

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

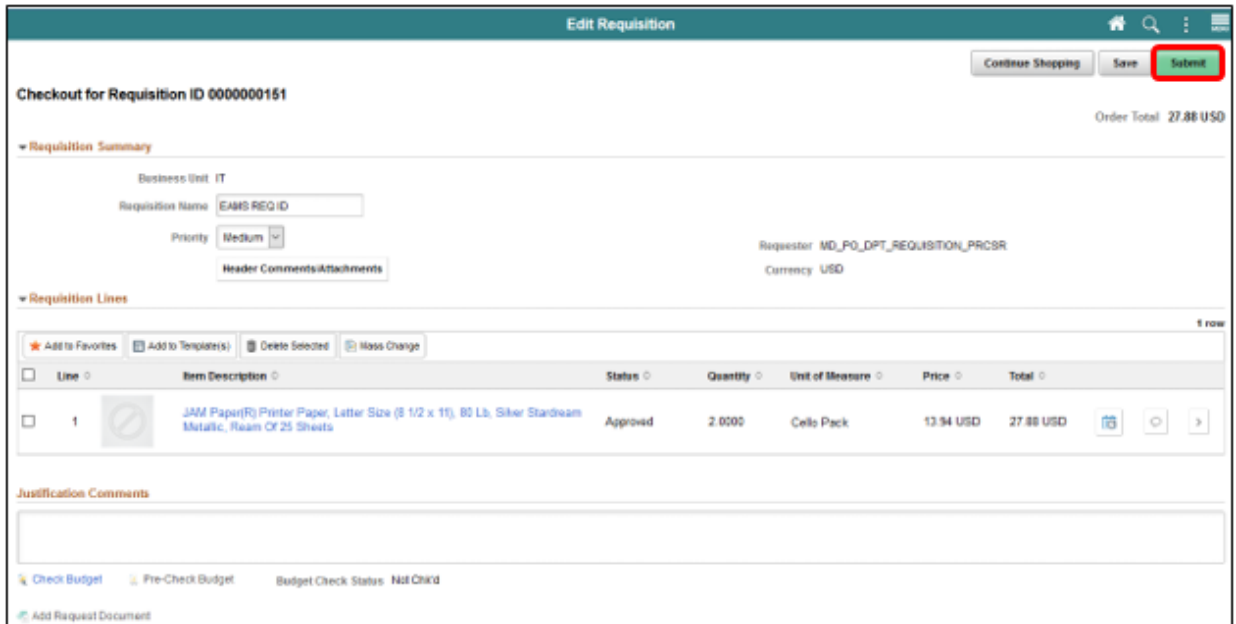
Total: 27.88 USD

Lesson 2: Manage a Requisition

Lecture 2: Edit a Requisition

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

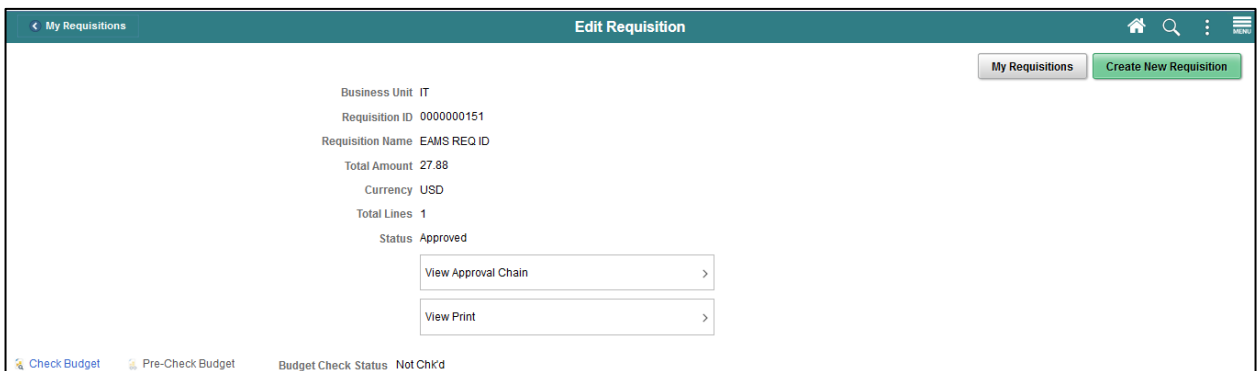
9. Select the **SUBMIT** button. The system will route the requisitioner to the save confirmation page.



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

Save Confirmation Page

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



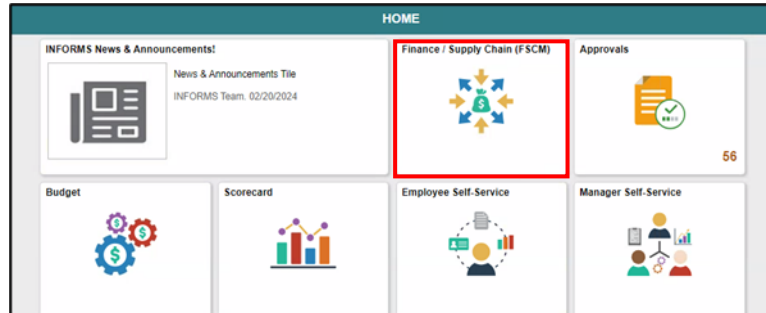
The screenshot shows the 'Save Confirmation Page' for the same requisition. The page displays a summary of the requisition: Business Unit (IT), Requisition ID (0000000151), Requisition Name (EAMS REQ ID), Total Amount (27.88), Currency (USD), Total Lines (1), and Status (Approved). There are buttons for 'View Approval Chain' and 'View Print'. At the bottom, there are buttons for 'Check Budget', 'Pre-Check Budget', and 'Budget Check Status: Not Chkd'.

Lesson 2: Manage a Requisition

Lecture 3: View and Print a Requisition

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

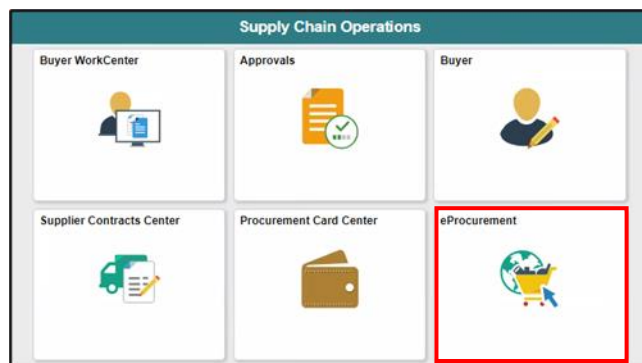
1. Login into **INFORMS** and select the **FINANCE/SUPPLY CHAIN (FSCM)**.



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



3. Select the **ePROCUREMENT** tile.



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



Lesson 2: Manage a Requisition

Lecture 3: View and Print a Requisition

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

Common Elements Used in My Requisition

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

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

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

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

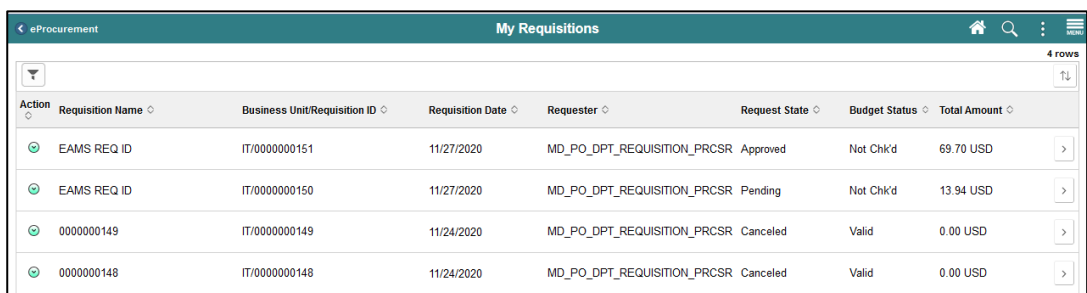
My Requisitions Page

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

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

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

Note: The requisitioner must select on the related action icon of the requisition to print.



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

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



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

Lesson 2: Manage a Requisition

Lecture 3: View and Print a Requisition

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

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

Do you want to print the requisition with distribution details ?

Yes
No

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

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

Diet	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	ADDITIONALCHRG	0.000

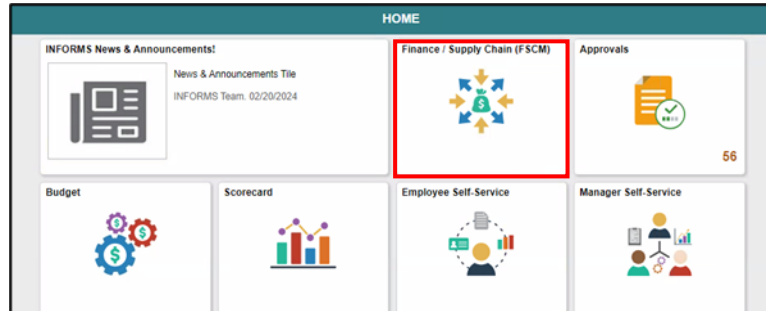
GL Base Amount	Currency	Sequence	Capitalize
27.88	USD	0	N

Lesson 2: Manage a Requisition

Lecture 4: Cancel a Requisition

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

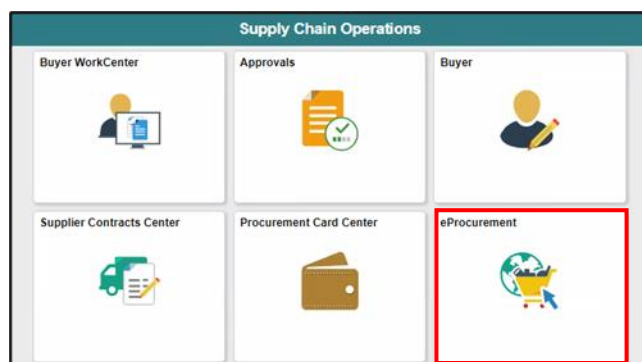
1. Login into **INFORMS** and select the **FINANCE/SUPPLY CHAIN (FSCM)**.



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



3. Select the **ePROCUREMENT** tile.



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



Lesson 2: Manage a Requisition

Lecture 4: Cancel a Requisition

Common Elements Used in My Requisition

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

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

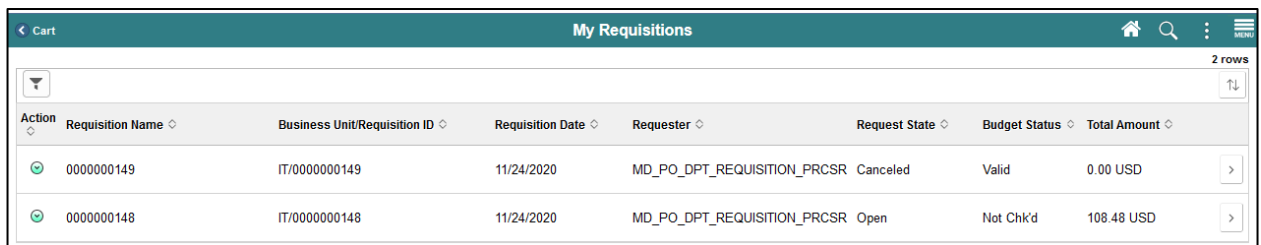
The **VIEW DETAILS** button is used for the Line Details page.

My Requisition Page

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

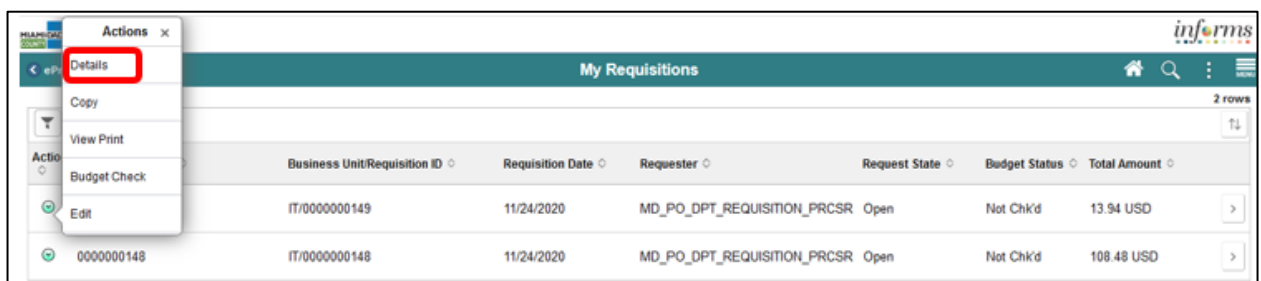
Note: A requisitioner may have access to all the related actions; however, this lecture only covers the details option.

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



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

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



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

Lesson 2: Manage a Requisition

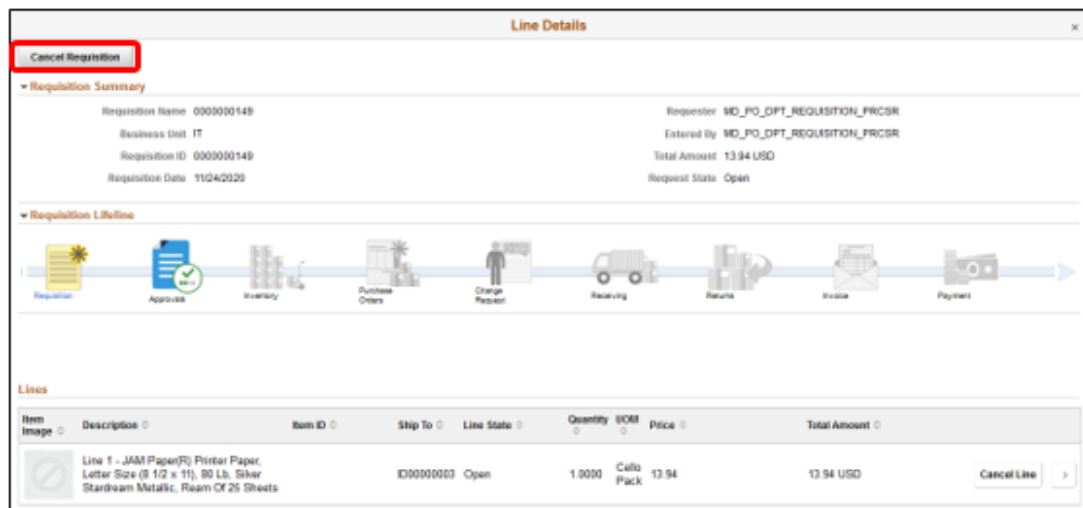
Lecture 4: Cancel a Requisition

Line Details Page

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

This lecture covers the cancelation of the entire requisition.

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



Line Details

Cancel Requisition


Requisition Summary

Requisition Name: 000000149	Requester: MD_PO_DPT_REQUISITION_FRCSR
Business Unit: IT	Entered By: MD_PO_DPT_REQUISITION_FRCSR
Requisition ID: 000000149	Total Amount: 13.94 USD
Requisition Date: 11/24/2020	Request State: Open

Requisition Lifeline

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

Lines

Item Image	Description	Item ID	Ship To	Line State	Quantity	UOM	Price	Total Amount
	Line 1 - JAM Paper(R) Printer Paper, Letter Size (8 1/2 x 11), 80 Lb, Silver Starstream Metallic, Room Of 25 Sheets	ID00000003		Open	1.0000	Cello Pack	13.94	13.94 USD

Cancel Line

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



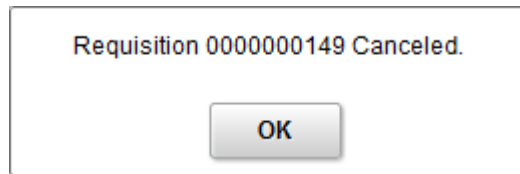
This will cancel your entire requisition. Are you sure you want to do this?

Yes **No**

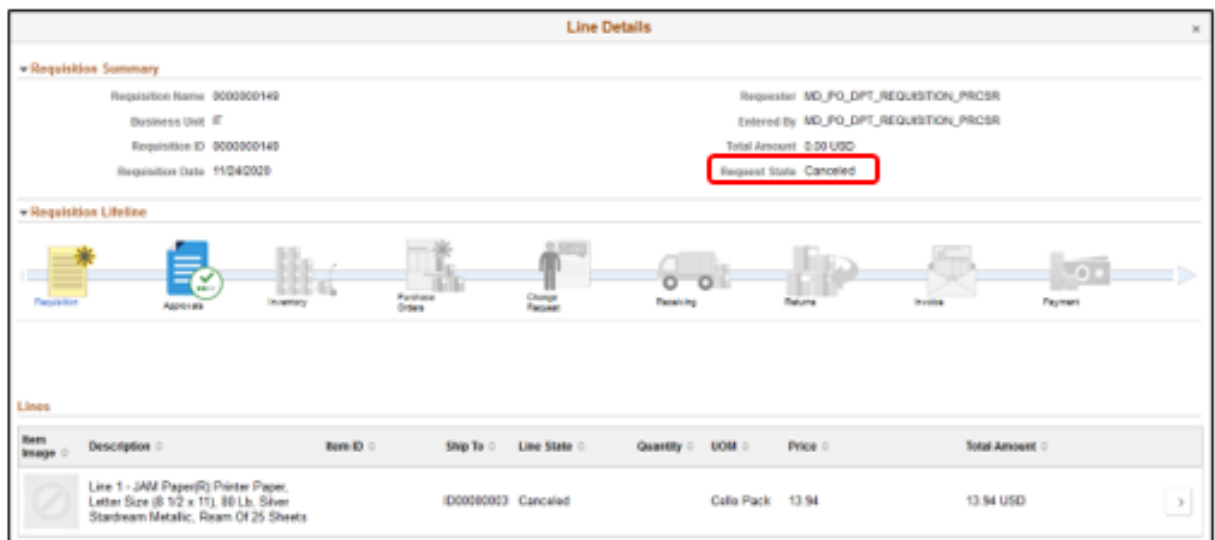
Lesson 2: Manage a Requisition

Lecture 4: Cancel a Requisition

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



7. Confirm that the **REQUEST STATE** field reflects “*CANCELED.*”
8. Select the **CLOSED** icon. The system then routes the requisitioner to the my requisitions page.



Line Details


Requisition Summary

Requisition Name: 9000900149	Requester: MD_FO_DPT_REQUESTION_PRCR
Business Unit: IT	Entered By: MD_FO_DPT_REQUESTION_PRCR
Requisition ID: 9000900149	Total Amount: 0.00 USD
Requisition Date: 11/24/2020	Request State: Canceled

Requisition Lifecycle

Requisition → Approve → Inventory → Purchase Order → Change Request → Receiving → Return → Invoice → Payment

Lines

Item Image	Description	Item ID	Ship To	Line State	Quantity	UOM	Price	Total Amount
	Line 1 - JAM Paper(R) Printer Paper, Letter Size (8 1/2 x 11), 88 Lb, Silver Starstream Metallic, Ream Of 25 Sheets	ID00080003		Canceled		Carton Pack	13.94	13.94 USD

Lesson 2: Lesson Summary

Lesson Summary



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

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

Lesson 3: Approve a Requisition

Lesson 2: Introduction

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

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

Lesson 3: Approve a Requisition

Key Terms



The following key terms are used in this lesson:

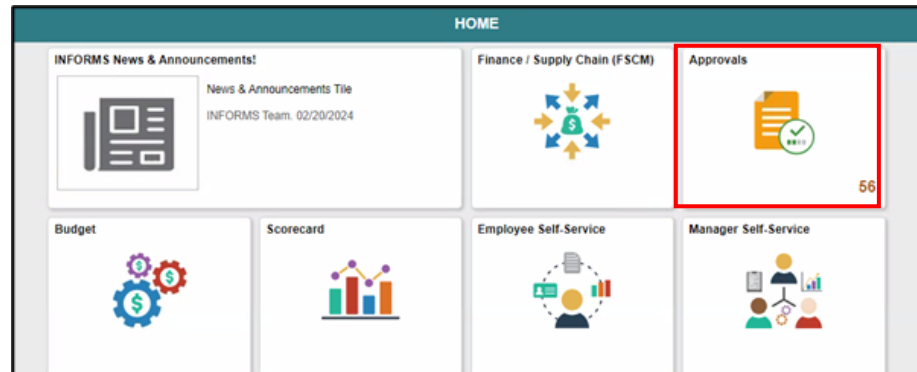
Term	Definition
Pending Approval Page	The Pending Approval Page displays pending requisition header information for the approver to review.
Requisition Header Approval Page	The Requisition Header Approval Page displays the requisition header, lines, and approver comments.
Approval Line Detail Page	The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

Lesson 3: Approve a Requisition

Lecture 1: Approve a Requisition

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

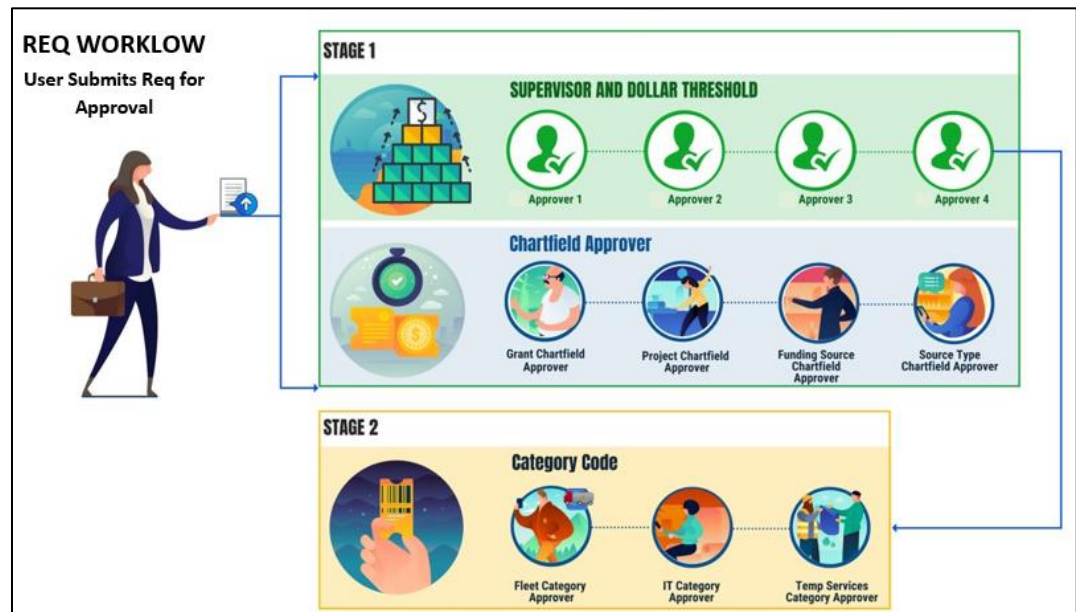
1. Login to INFORMS and select the **APPROVALS** tile.



Lesson 3: Approve a Requisition

Lecture 1: Approve a Requisition

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



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

Lesson 3: Approve a Requisition

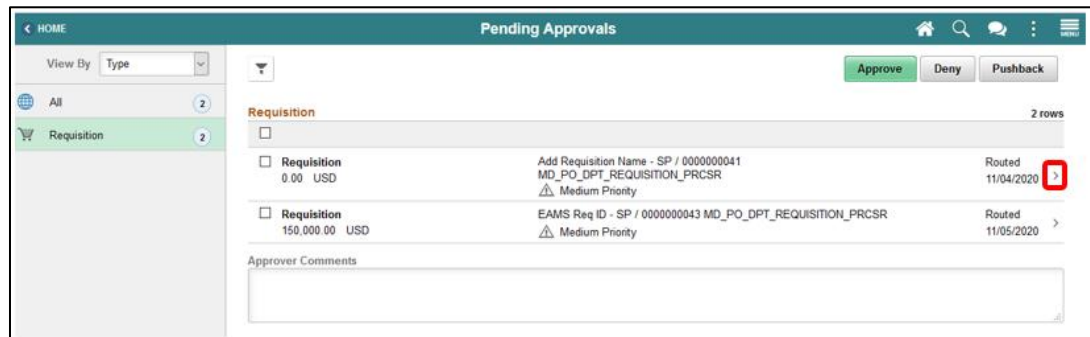
Lecture 1: Approve a Requisition

Pending Approval Page

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

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

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



The screenshot shows the 'Pending Approvals' interface. On the left, there's a sidebar with 'View By' set to 'Type' and a list of items including 'All' (2) and 'Requisition' (2). The main area displays a table of requisitions. The first row shows a requisition for 0.00 USD with the description 'Add Requisition Name - SP / 0000000041 MD_PO_DPT_REQUISITION_PRCR' and a medium priority. The second row shows a requisition for 150,000.00 USD with the description 'EAMS Req ID - SP / 0000000043 MD_PO_DPT_REQUISITION_PRCR' and a medium priority. Both are marked as 'Routed' on 11/04/2020 and 11/05/2020 respectively. At the top right, there are buttons for 'Approve', 'Deny', and 'Pushback'. A red box highlights the 'ALL' button in the top right corner of the table area.

Requisition	Amount	Currency	Description	Priority	Routed
<input type="checkbox"/> Requisition	0.00	USD	Add Requisition Name - SP / 0000000041 MD_PO_DPT_REQUISITION_PRCR	Medium Priority	Routed 11/04/2020
<input type="checkbox"/> Requisition	150,000.00	USD	EAMS Req ID - SP / 0000000043 MD_PO_DPT_REQUISITION_PRCR	Medium Priority	Routed 11/05/2020

Approver Comments

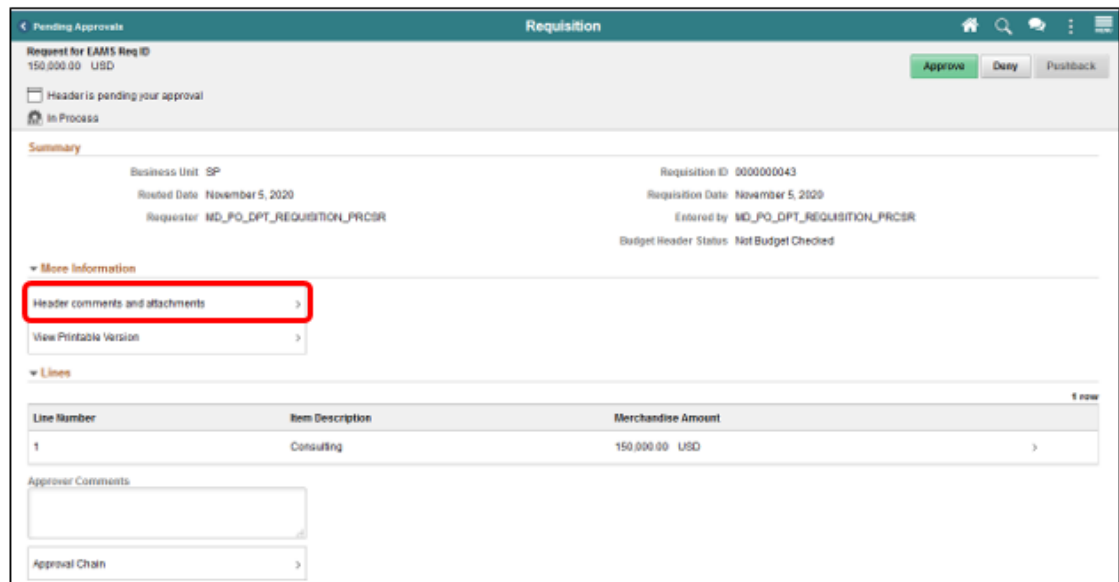
Requisition Header Approval Page

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

Lesson 3: Approve a Requisition

Lecture 1: Approve a Requisition

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



Pending Approvals **Requisition**

Request for EAMS Req ID
150,000.00 USD

Header is pending your approval

In Process

Summary

Business Unit SP
Routed Date November 5, 2020
Requester MD_PO_DPT_REQUISITION_PRCBR

Requisition ID 000000043
Requisition Date November 5, 2020
Entered by MD_PO_DPT_REQUISITION_PRCBR
Budget Header Status Not Budget Checked

More Information

Header comments and attachments

View Printable Version

Lines

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

Approver Comments

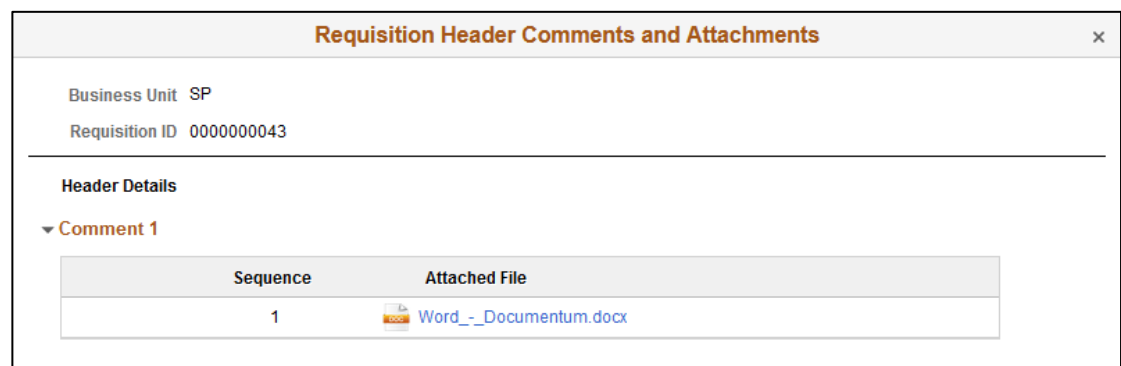
Approval Chain

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

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

5. Select the **CLOSE** button.

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




Requisition Header Comments and Attachments

Business Unit SP
Requisition ID 000000043

Header Details

▼ **Comment 1**

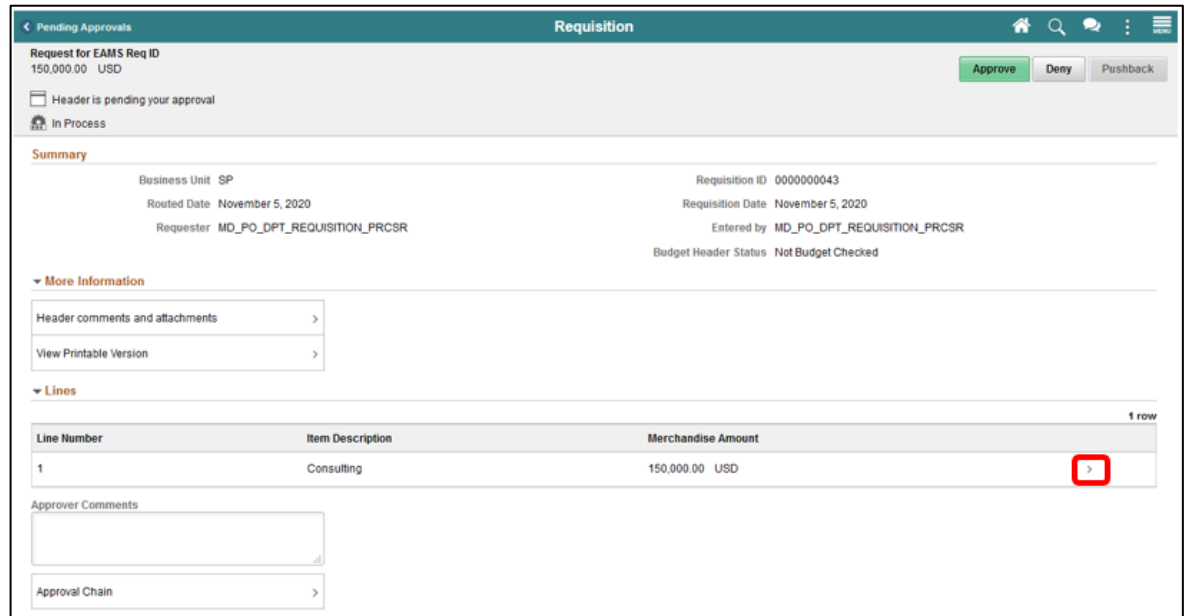
Sequence	Attached File
1	 Word_-_Documentum.docx

Lesson 3: Approve a Requisition

Lecture 1: Approve a Requisition

6. Select the **MORE** arrow.

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



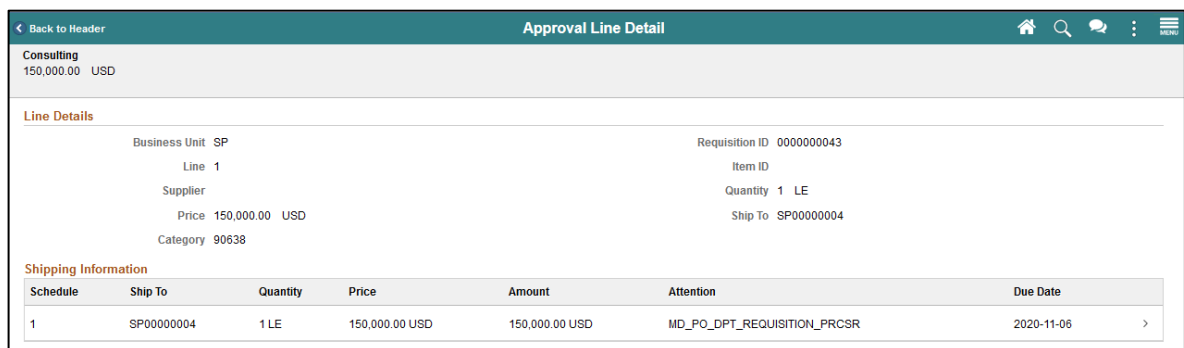
Approval Line Detail Page

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

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

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

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



Lesson 3: Approve a Requisition

Lecture 1: Approve a Requisition

Distribution Page

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

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

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

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

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

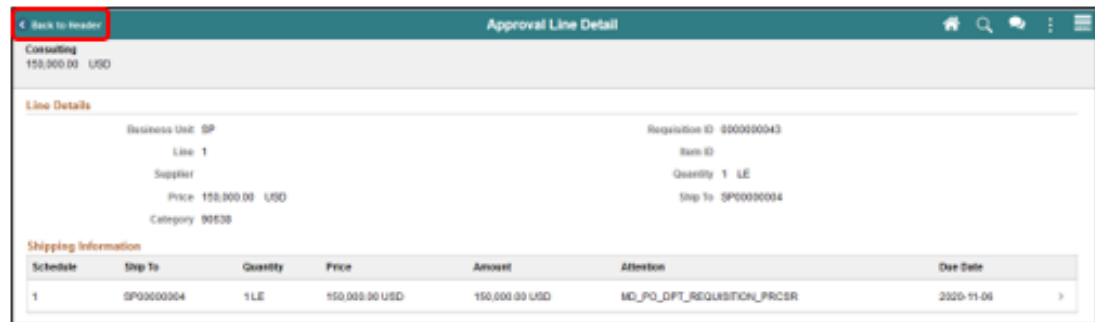
14. Confirm the **PC BUSINESS UNIT** value. This field reflects the Business Unit of the requestor.
15. Confirm the **PROJECT** value. This value is created in the Project Costing module.
16. Confirm the **ACTIVITY** value. The activity value represents a subtask in project costing (i.e., Planning, Design).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

Distributions											
Fluid Approval Distribution											
Line 1											
Schedule 1											
Item Description Consulting											
Merchandise Amount 150,000.00 USD											
Quantity 1.0000 LE											
Distribution Line	Requisition Quantity	GL Business Unit	Merchandise Amount	Currency Code	Fund Code	Department	Account	Grant	PC Business Unit	Project	Activity
1	1.0000	MDADE	150000.00	USD	G5005	ID01010000	5470120000	NO-GRANT			

Lesson 3: Approve a Requisition

Lecture 1: Approve a Requisition

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



Approval Line Detail

Consulting 150,000.00 USD

Line Details

Business Unit: SP	Requisition ID: 000000043
Line: 1	Item ID
Supplier	Quantity: 1 LE
Price: 150,000.00 USD	Ship To: SP00000004
Category: 90138	

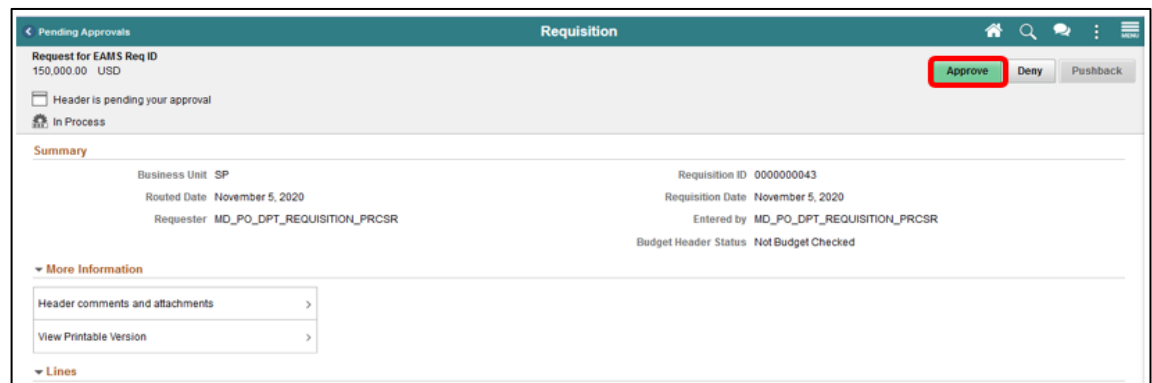
Shipping Information

Schedule	Ship To	Quantity	Price	Amount	Attention	Due Date
1	SP00000004	1 LE	150,000.00 USD	150,000.00 USD	MD_PO_DPT_REQUISITION_PRCR	2020-11-04

Requisition Header Page

Once all requisition values are reviewed and confirmed:

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



Pending Approvals Requisition

Request for EAMS Req ID 150,000.00 USD

☐ Header is pending your approval

In Process

Summary

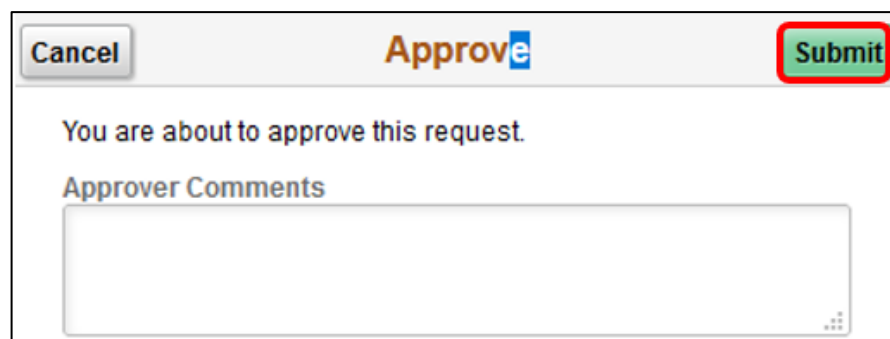
Business Unit: SP	Requisition ID: 000000043
Routed Date: November 5, 2020	Requisition Date: November 5, 2020
Requester: MD_PO_DPT_REQUISITION_PRCR	Entered by: MD_PO_DPT_REQUISITION_PRCR
	Budget Header Status: Not Budget Checked

More Information

- Header comments and attachments >
- View Printable Version >

Lines

21. Enter **APPROVER COMMENTS**. These comments are visible to the next approver and the requisitioner.
22. Select the **SUBMIT** button. This action then routes the user back to the requisition header page.



Cancel **Approve** **Submit**

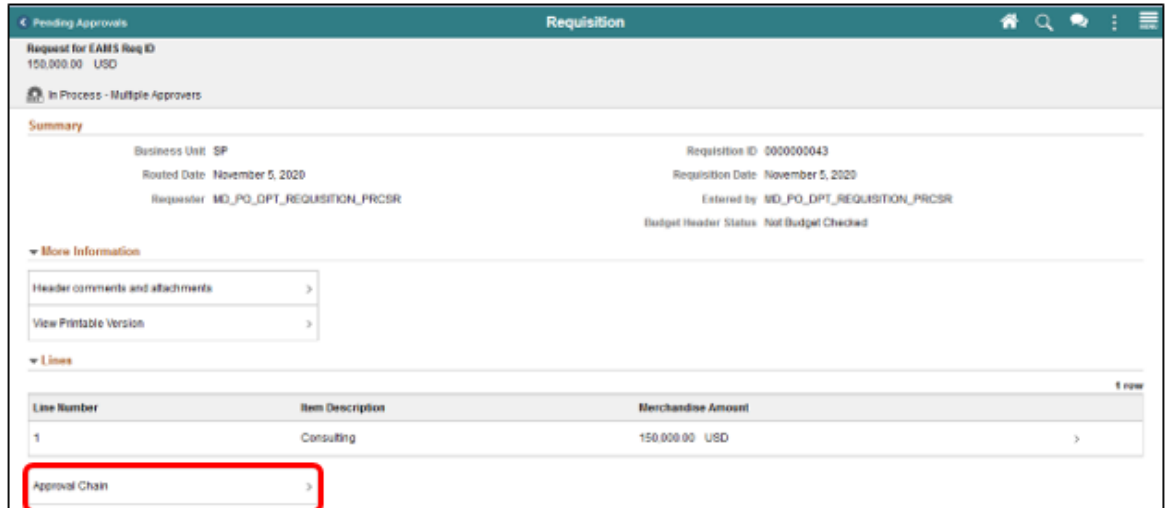
You are about to approve this request.

Approver Comments

Lesson 3: Approve a Requisition

Lecture 1: Approve a Requisition

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



Pending Approvals Requisition

Request for EAMS Req ID
150,000.00 USD

In Process - Multiple Approvers

Summary

Business Unit: SP
Routed Date: November 5, 2020
Requester: MD_PO_DPT_REQUISITION_PRCBR

Requisition ID: 000000043
Requisition Date: November 5, 2020
Entered by: MD_PO_DPT_REQUISITION_PRCBR
Budget Header Status: Not Budget Checked

More Information

Header comments and attachments >

View Printable Version >

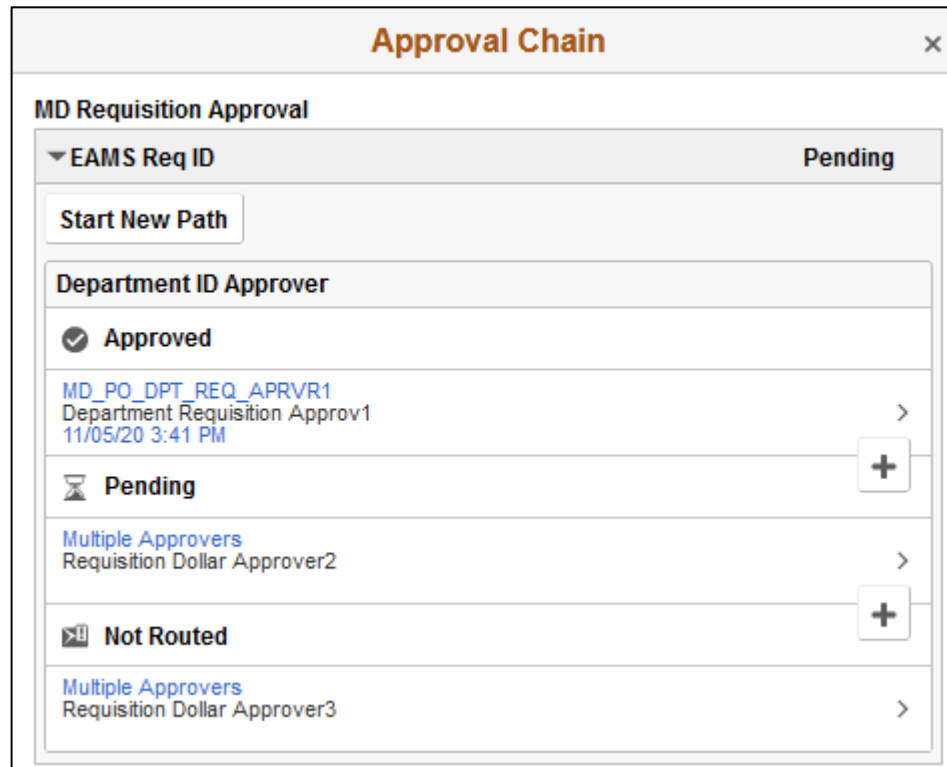
Lines

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

Approval Chain >

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

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



Approval Chain X

MD Requisition Approval

▼ EAMS Req ID Pending

Start New Path

Department ID Approver

✓ **Approved**

MD_PO_DPT_REQ_APRVR1
Department Requisition Approv1
11/05/20 3:41 PM >

⌚ **Pending** +

Multiple Approvers
Requisition Dollar Approver2 >

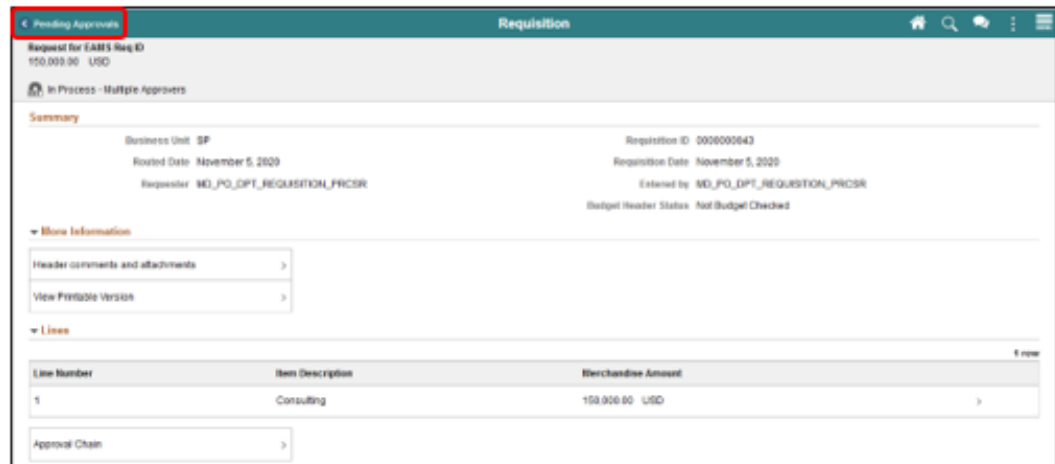
📄 **Not Routed** +

Multiple Approvers
Requisition Dollar Approver3 >

Lesson 3: Approve a Requisition

Lecture 1: Approve a Requisition

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



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



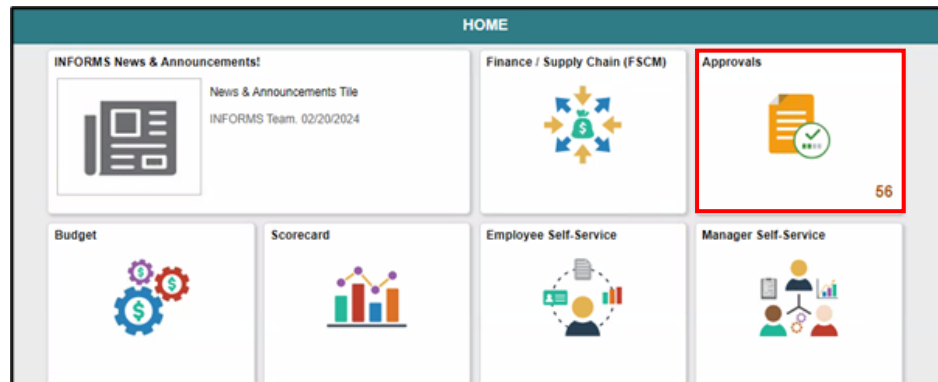
View By	Type	Filter	Requisition	Amount	Details	Actions
All	1	All	Requisition	0.00 USD	Add Requisition Name - SP / 0000000041 MD_PO_DPT_REQUISITION_PRCR Medium Priority	Routed 11/04/2020

Lesson 3: Approve a Requisition

Lecture 2: Deny a Requisition

Navigate to: **Approvals** tile

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



Pending Approvals Page

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

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

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

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

Lesson 3: Approve a Requisition

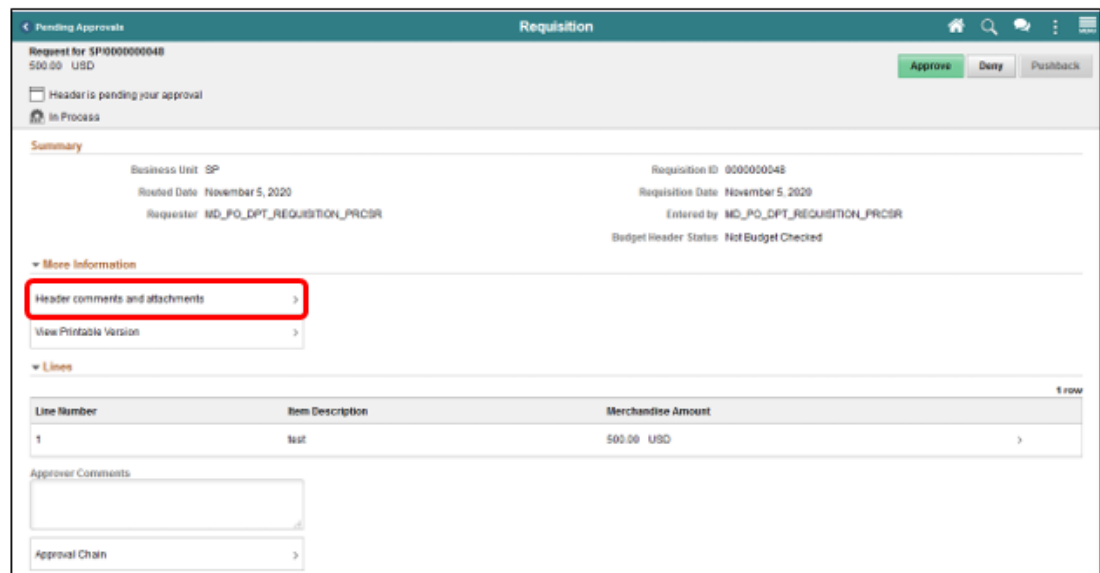
Lecture 2: Deny a Requisition

Requisition Header Approval Page

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

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

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



Pending Approvals **Requisition**

Request for SP000000048
500.00 USD

Header is pending your approval

In Process

Summary

Business Unit: SP
Routed Date: November 5, 2020
Requester: MD_PO_DPT_REQUISITION_PROSR

Requisition ID: 000000048
Requisition Date: November 5, 2020
Entered by: MD_PO_DPT_REQUISITION_PROSR
Budget Header Status: Not Budget Checked

More Information

Header comments and attachments

View Printable Version

Lines

Line Number	Item Description	Merchandise Amount
1	test	500.00 USD

Approver Comments


Approval Chain

Lesson 3: Approve a Requisition

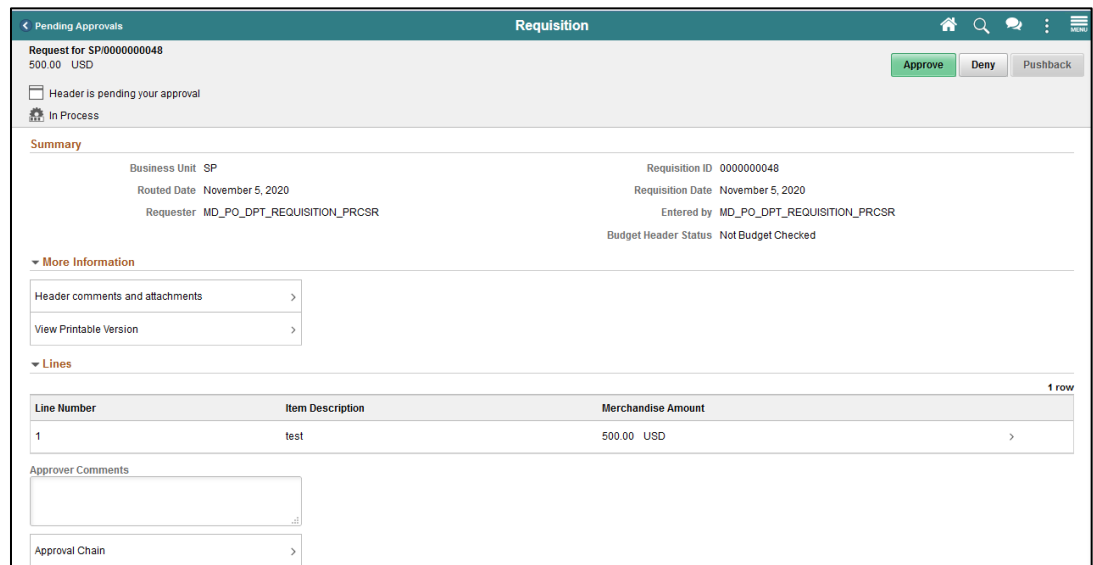
Lecture 2: Deny a Requisition

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



Sequence	Attached File
1	 Word_-_Documentum.docx

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



Line Number	Item Description	Merchandise Amount
1	test	500.00 USD

Lesson 3: Approve a Requisition

Lecture 2: Deny a Requisition

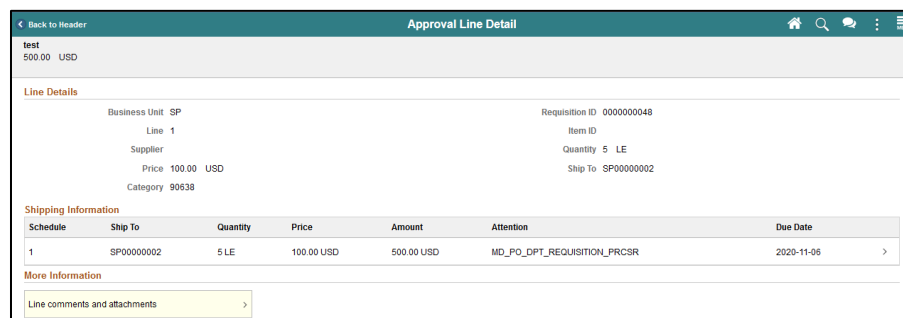
Approval Line Detail Page

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

1. Review the **Line Details** section and confirm that the correct **QUANTITY** and **PRICE** are listed.
2. Review the **Shipping Information** section and confirm that the **SHIP TO**, **ATTENTION**, and **DUE DATE** fields are correct.

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

3. Select the **MORE** button. This action routes the user to the distribution page.



Back to Header

test
500.00 USD

Approval Line Detail

Line Details

Business Unit: SP
Line: 1
Supplier:
Price: 100.00 USD
Category: 90538

Requisition ID: 0000000048
Item ID:
Quantity: 5 LE
Ship To: SP000000002

Shipping Information

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

More Information

Line comments and attachments

Distribution Page

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

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

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

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

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

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

Lesson 3: Approve a Requisition

Lecture 2: Deny a Requisition

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

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

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

Back to Header

Approval Line Detail

test

500.00 USD

Line Details

Business Unit

SP

Line

1

Supplier

Price

100.00 USD

Category

00038

Requisition ID

000000048

Item ID

Quantity

5 LE

Ship To

SP00000002

Shipping Information

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

More Information

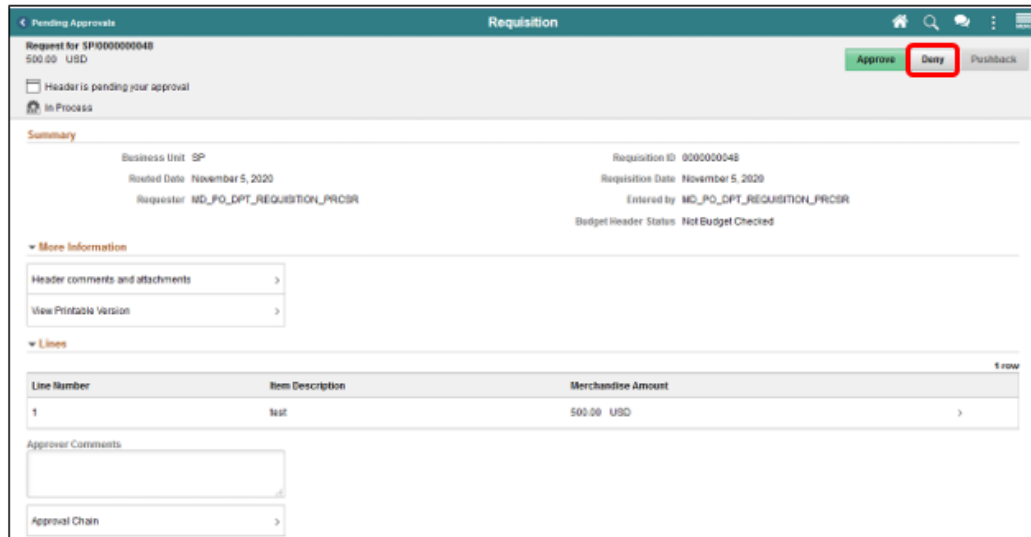
Line comments and attachments

Lesson 3: Approve a Requisition

Lecture 2: Deny a Requisition

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

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



Pending Approvals Requisition

Request for SP0000000048
500.00 USD

☐ Header is pending your approval

Summary

Business Unit: SP
Revised Date: November 5, 2020
Requester: MD_PO_DPT_REQUISITION_PROCSR

Requisition ID: 0000000048
Requisition Date: November 5, 2020
Entered by: MD_PO_DPT_REQUISITION_PROCSR
Budget Header Status: Not Budget Checked

More Information

Header comments and attachments >

View Printable Version >

Lines

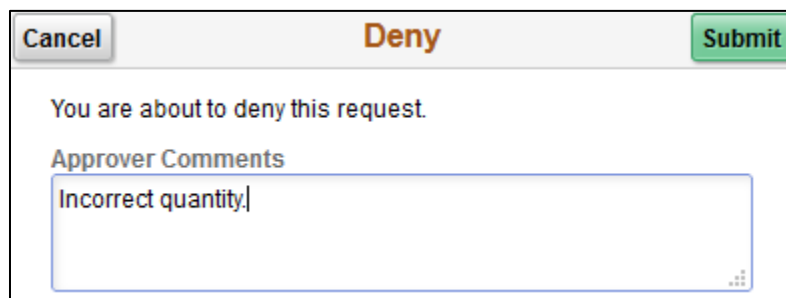
Line Number	Item Description	Merchandise Amount
1	test	500.00 USD

Approver Comments

Approval Chain >

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

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



Cancel **Deny** **Submit**

You are about to deny this request.

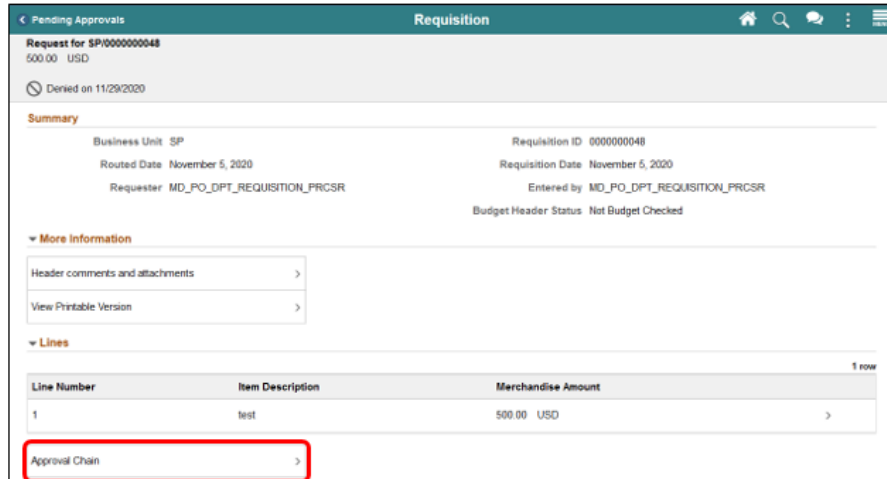
Approver Comments

Incorrect quantity.

Lesson 3: Approve a Requisition

Lecture 2: Deny a Requisition

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



Pending Approvals **Requisition**

Request for SP/0000000048
500.00 USD
Denied on 11/29/2020

Summary

Business Unit: SP
Routed Date: November 5, 2020
Requester: MD_PO_DPT_REQUISITION_PRCR

Requisition ID: 0000000048
Requisition Date: November 5, 2020
Entered by: MD_PO_DPT_REQUISITION_PRCR
Budget Header Status: Not Budget Checked

More Information

Header comments and attachments >
View Printable Version >

Lines

Line Number	Item Description	Merchandise Amount
1	test	500.00 USD

Approval Chain >

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



Approval Chain

MD Requisition Approval

Requisition 0000000048 **Denied**

Department ID Approver

Denied
MD_PO_DPT_REQ_APRVR1
Department Requisition Approv1
11/05/20 4:30 PM

Comments

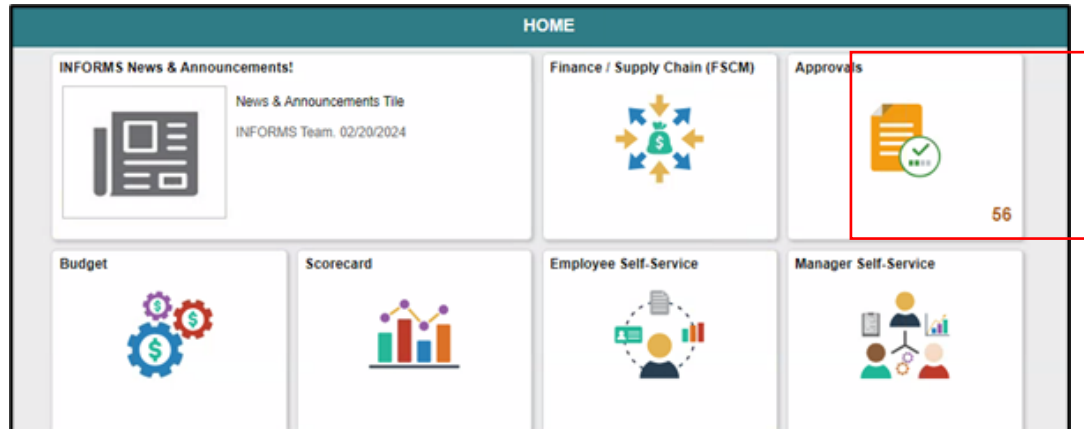
MD_PO_DPT_REQ_APRVR1 at 11/05/20 - 4:30 PM
Incorrect quantity.

Lesson 3: Approve a Requisition

Lecture 3: Pushback a Requisition

Navigate to: **Approvals** tile

1. Select the **APPROVALS** tile.

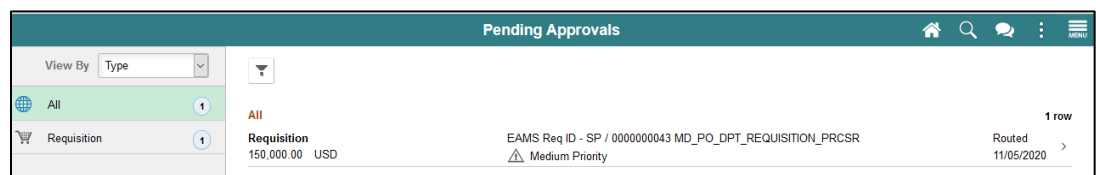


Pending Approval Page

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

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

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



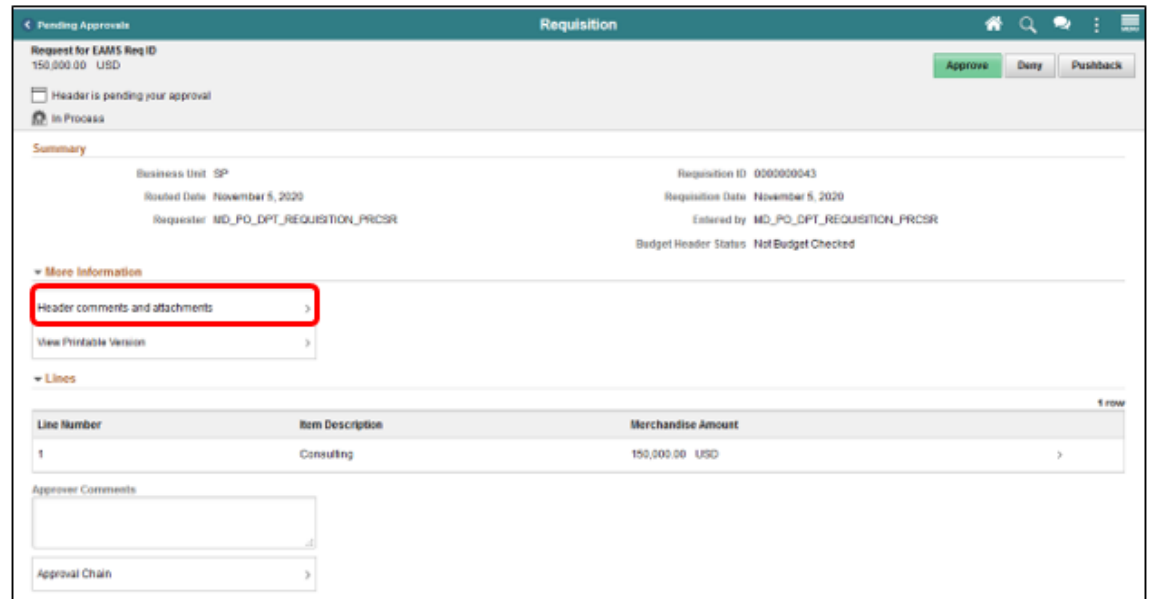
Lesson 3: Approve a Requisition

Lecture 3: Pushback a Requisition

Requisition Header Approval Page

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

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



← Pending Approvals Requisition

Request for EAMS Req ID
150,000.00 USD

Header is pending your approval

In Process

Summary

Business Unit: SP Requisition ID: 000000043
Requisition Date: November 5, 2020
Requester: MD_PO_DPT_REQUISITION_PRCOR Entered by: MD_PO_DPT_REQUISITION_PRCOR
Budget Header Status: Not Budget Checked

▼ More Information

Header comments and attachments >

View Printable Version >

▼ Lines

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

Approver Comments

Approval Chain >

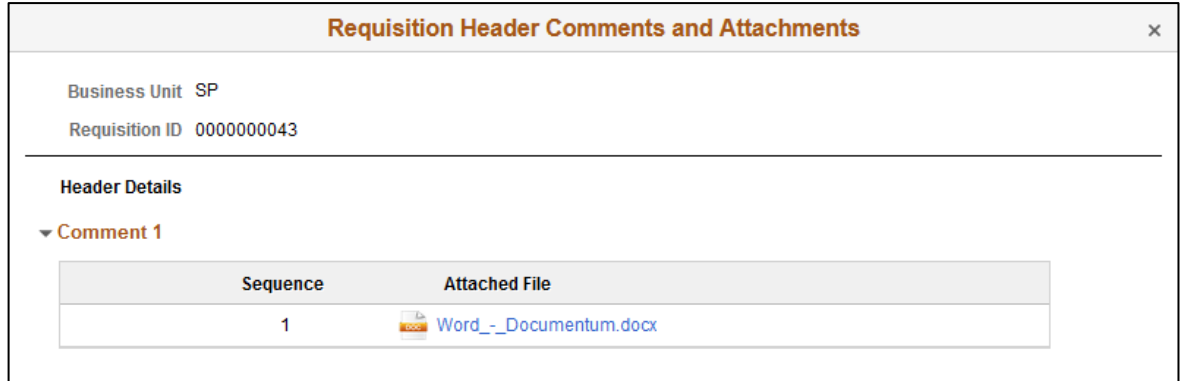
4. Review the comment text submitted by the requisitioner.
5. Select the **ATTACHED FILE** icon for each attached document.

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

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

Lesson 3: Approve a Requisition

Lecture 3: Pushback a Requisition




Requisition Header Comments and Attachments

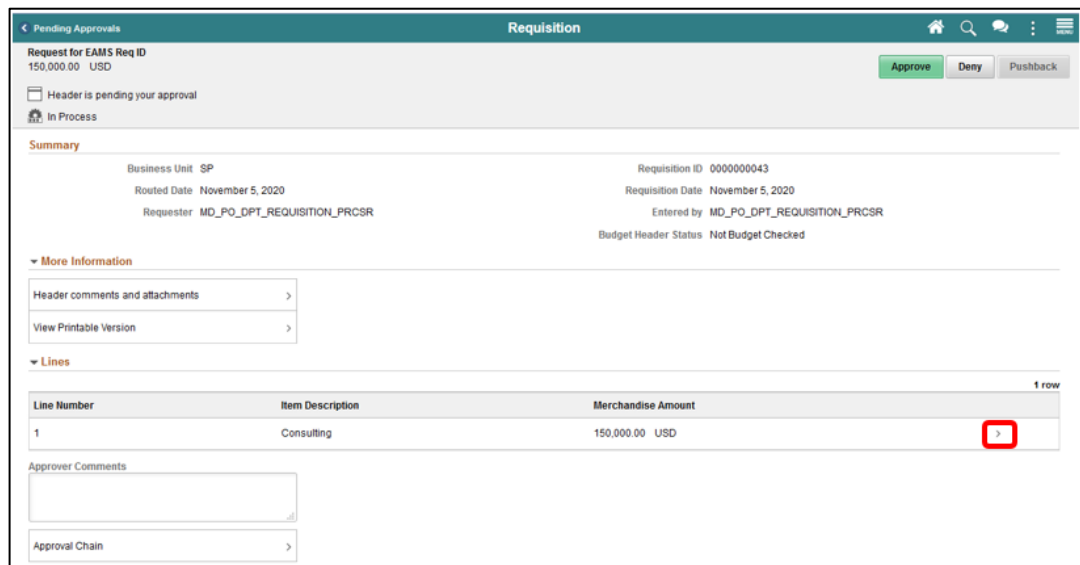
Business Unit SP
Requisition ID 0000000043

Header Details

▼ **Comment 1**

Sequence	Attached File
1	 Word_-_Documentum.docx

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



Pending Approvals Requisition

Request for EAMS Req ID 150,000.00 USD Approve Deny Pushback

Header is pending your approval
In Process

Summary

Business Unit SP	Requisition ID 0000000043
Routed Date November 5, 2020	Requisition Date November 5, 2020
Requester MD_PO_DPT_REQUISITION_PRCR	Entered by MD_PO_DPT_REQUISITION_PRCR
Budget Header Status Not Budget Checked	

▼ **More Information**

Header comments and attachments >

View Printable Version >

▼ **Lines**

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

1 row

Approver Comments

Approval Chain >

Approval Line Detail Page:

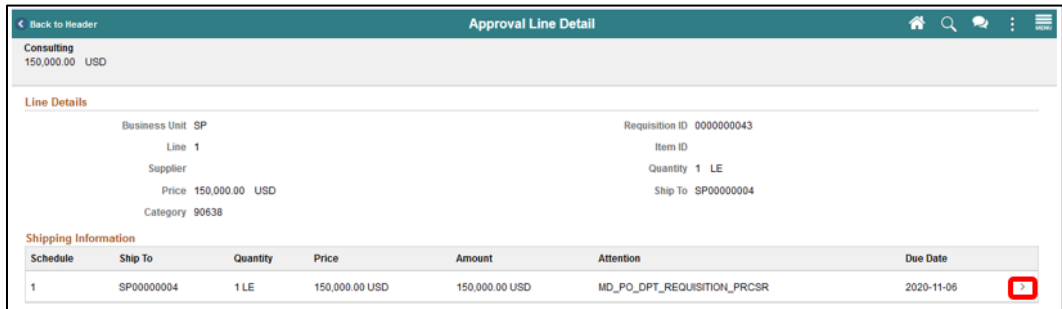
2. The approval line detail page displays the requisition line and shipping information.
3. Review the **Line Detail** section and confirm that the correct quantities and prices are listed.
4. Review the Shipping Information section and confirm that the **SHIP TO, ATTENTION TO**, and **DUE DATE** fields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

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

Lesson 3: Approve a Requisition

Lecture 3: Pushback a Requisition

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



Approval Line Detail

Consulting
150,000.00 USD

Line Details

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

Requisition ID 000000043
Item ID
Quantity 1 LE
Ship To SP00000004

Shipping Information

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

Distribution Page

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

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

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

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

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

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

Lesson 3: Approve a Requisition

Lecture 3: Pushback a Requisition

Distributions											
Fluid Approval Distribution											
Line 1											
Schedule 1											
Item Description Consulting											
Merchandise Amount 150,000.00 USD											
Quantity 1.0000 LE											
Distribution Line	Requisition Quantity	GL Business Unit	Merchandise Amount	Currency Code	Fund Code	Department	Account	Grant	PC Business Unit	Project	Activity
1	1.0000	MDADE	150000.00	USD	G5005	ID01010000	5470120000	NO-GRANT			

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

← Back to Header

Approval Line Detail

Consulting

150,000.00 USD

Line Details

Business Unit

SP

Line

1

Supplier

Price

150,000.00 USD

Category

90638

Requisition ID

0000000043

Item ID

Quantity

1 LE

Ship To

SP000000004

Shipping Information

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

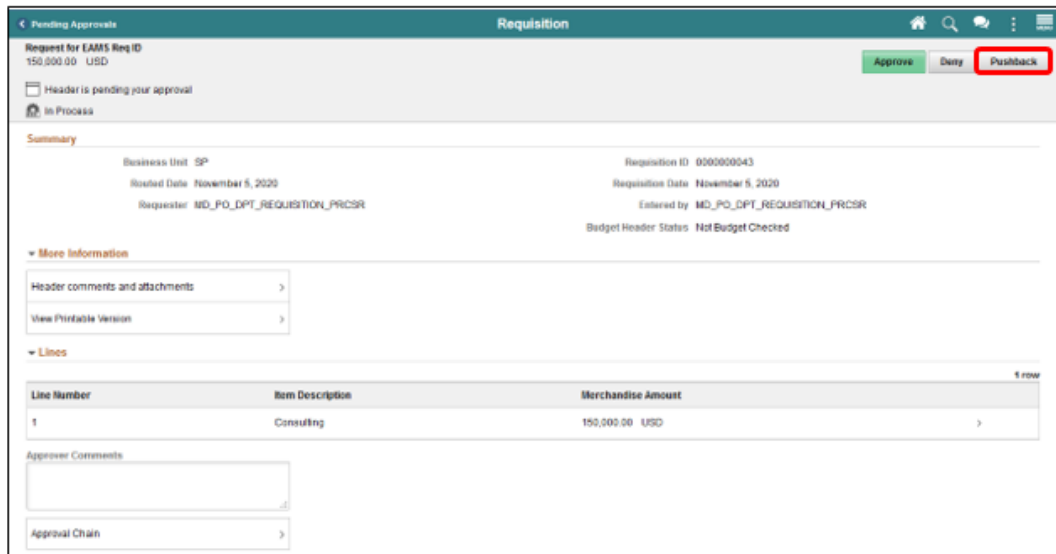
Lesson 3: Approve a Requisition

Lecture 3: Pushback a Requisition

Requisition Header Page

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

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



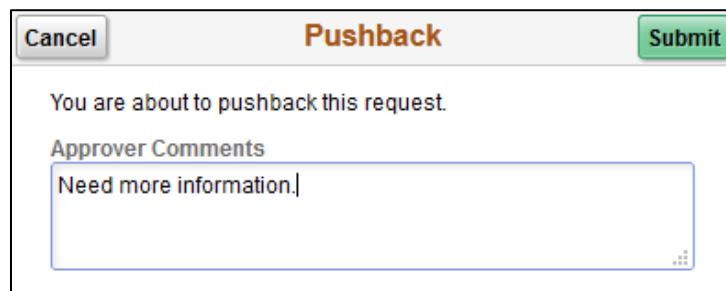
Requisition Header Page details:

- Request for EAMS Req ID: 150,000.00 USD
- Buttons: Approve, Deny, **Pushback**
- Status: Header is pending your approval
- Summary:
 - Business Unit: SP
 - Requisition ID: 000000043
 - Routed Date: November 5, 2020
 - Requisition Date: November 5, 2020
 - Requester: MD_PO_DPT_REQUISITION_PRCR
 - Entered by: MD_PO_DPT_REQUISITION_PRCR
 - Budget Header Status: Not Budget Checked
- More Information:
 - Header comments and attachments
 - View Printable Version
- Lines:

Line Number	Item Description	Merchandise Amount
1	Consulting	150,000.00 USD
- Approver Comments: [Text Area]
- Approval Chain: [Link]

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

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



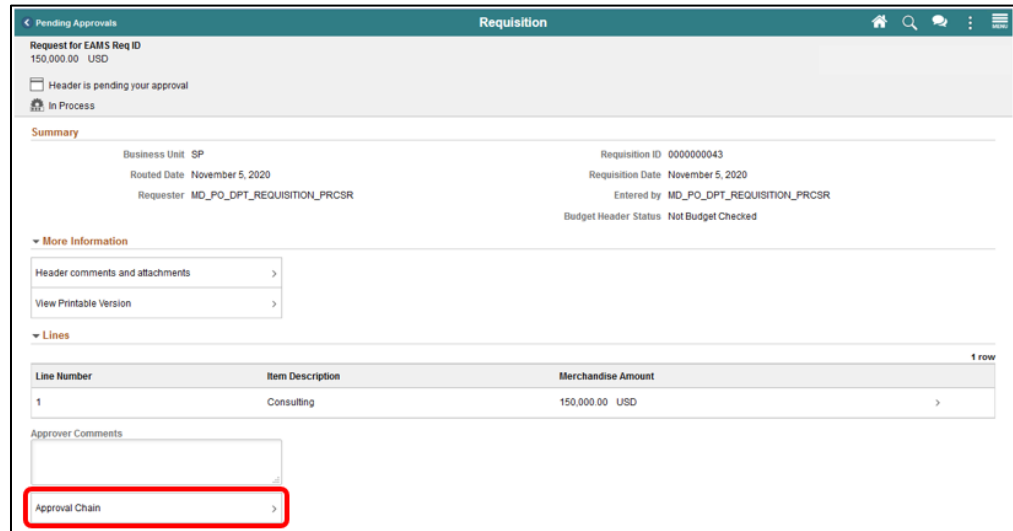
Pushback Dialog Box details:

- Buttons: Cancel, **Pushback**, Submit
- Message: You are about to pushback this request.
- Approver Comments:
 - Text Area: Need more information.
 - OK button

Lesson 3: Approve a Requisition

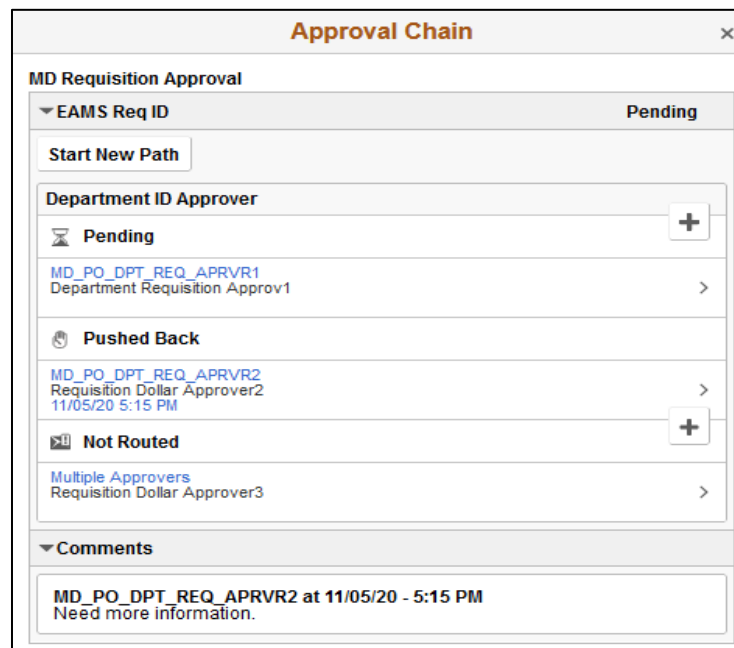
Lecture 3: Pushback a Requisition

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



The screenshot shows the 'Requisition' page for a pending approval. The top bar indicates 'Pending Approvals' and 'Requisition'. Below the header, it shows 'Request for EAMS Req ID 150,000.00 USD' and 'Header is pending your approval'. The 'Summary' section displays details like Business Unit (SP), Routed Date (November 5, 2020), and Requester (MD_PO_DPT_REQUISITION_PRCBR). The 'More Information' section includes links for 'Header comments and attachments' and 'View Printable Version'. The 'Lines' section shows a table with one row: Line Number 1, Item Description Consulting, and Merchandise Amount 150,000.00 USD. At the bottom, there is an 'Approver Comments' text area and a red box highlighting the 'Approval Chain' button.

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



The 'Approval Chain' dialog box displays the approval path for the requisition. It shows the 'MD Requisition Approval' status as 'Pending'. The path includes:

- Department ID Approver:** MD_PO_DPT_REQ_APRVR1 (Department Requisition Approv1) with a 'Pending' status and a '+' button.
- Pushed Back:** MD_PO_DPT_REQ_APRVR2 (Requisition Dollar Approver2) with a timestamp of 11/05/20 5:15 PM and a '+' button.
- Not Routed:** Multiple Approvers (Requisition Dollar Approver3) with a '+' button.

 The 'Comments' section at the bottom shows a comment from MD_PO_DPT_REQ_APRVR2 at 11/05/20 - 5:15 PM: 'Need more information.'

Lesson 3: Approve a Requisition

Lecture 4: Hold a Requisition

Navigation to: **Approvals** tile

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



Pending Approvals Page

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

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

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

HOME		Pending Approvals			
View By	Type				
All	6				
Requisition	6				
		All			6 rows
Requisition	200.00 USD	EAMS Req ID - SP / 0000000057 MD_PO_DPT_REQUISITION_PRCR		Routed	11/17/2020
		⚠ Medium Priority			
Requisition	200.00 USD	EAMS REQ ID - SP / 0000000058 MD_PO_DPT_REQUISITION_PRCR		Routed	11/17/2020
		⚠ Medium Priority			
Requisition	900.00 USD	EAMS Req ID - SP / 0000000059 MD_PO_DPT_REQUISITION_PRCR		Routed	11/17/2020
		⚠ Medium Priority			
Requisition	0.00 USD	EAMS Req ID - SP / 0000000060 MD_PO_DPT_REQUISITION_PRCR		Routed	11/19/2020
		⚠ Medium Priority			
Requisition	13.94 USD	EAMS REQ ID - IT / 0000000150 MD_PO_DPT_REQUISITION_PRCR		Routed	11/27/2020
		⚠ Medium Priority			
Requisition	27.88 USD	EAMS REQ ID - IT / 0000000153 MD_PO_DPT_REQUISITION_PRCR		Routed	11/29/2020
		⚠ Medium Priority			

Lesson 3: Approve a Requisition

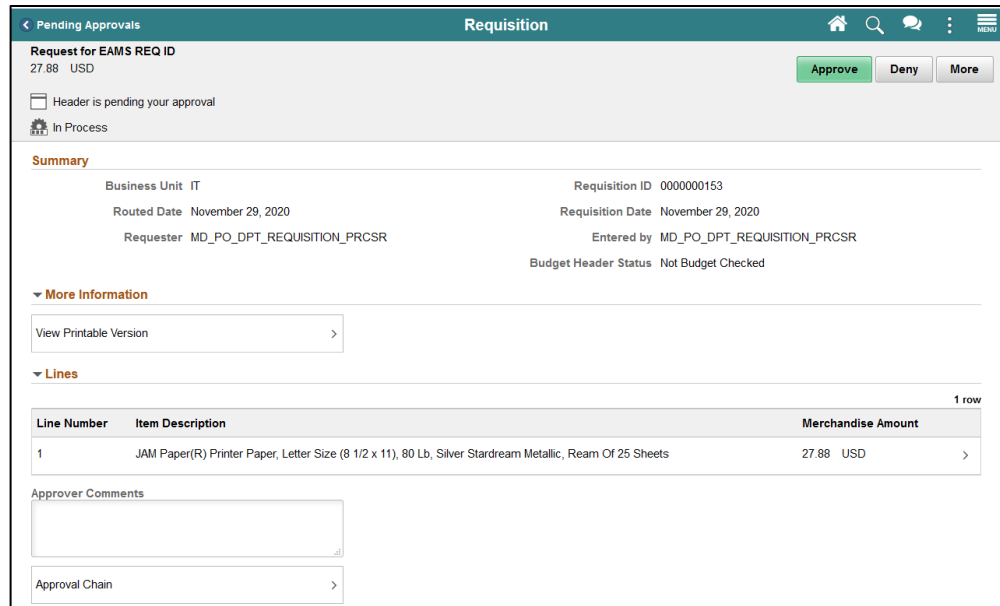
Lecture 4: Hold a Requisition

Requisition Header Approval Page

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

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

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



The screenshot shows the 'Requisition' header approval page. At the top, there are buttons for 'Approve', 'Deny', and 'More'. Below these, a status bar indicates 'Header is pending your approval' and 'In Process'. The 'Summary' section displays key information: Business Unit (IT), Routed Date (November 29, 2020), Requisition ID (0000000153), Requisition Date (November 29, 2020), Requester (MD_PO_DPT_REQUISITION_PRCR), Entered by (MD_PO_DPT_REQUISITION_PRCR), and Budget Header Status (Not Budget Checked). A 'More Information' section contains a 'View Printable Version' link. Below this is a 'Lines' section with a table showing one line item: Line Number 1, Item Description 'JAM Paper(R) Printer Paper, Letter Size (8 1/2 x 11), 80 Lb, Silver Stardream Metallic, Ream Of 25 Sheets', and Merchandise Amount '27.88 USD'. At the bottom, there are fields for 'Approver Comments' and an 'Approval Chain' link.

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

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



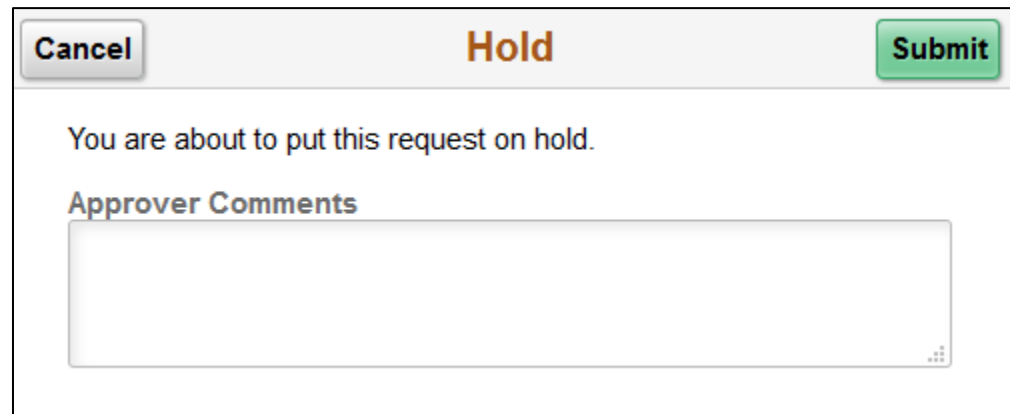
This screenshot is similar to the previous one, but it highlights the 'More' button in the top right corner with a red box. A dropdown menu is open, showing two options: 'Pushback' and 'Hold'. The 'Hold' option is also highlighted with a red box, indicating the action to be taken.

Lesson 3: Approve a Requisition

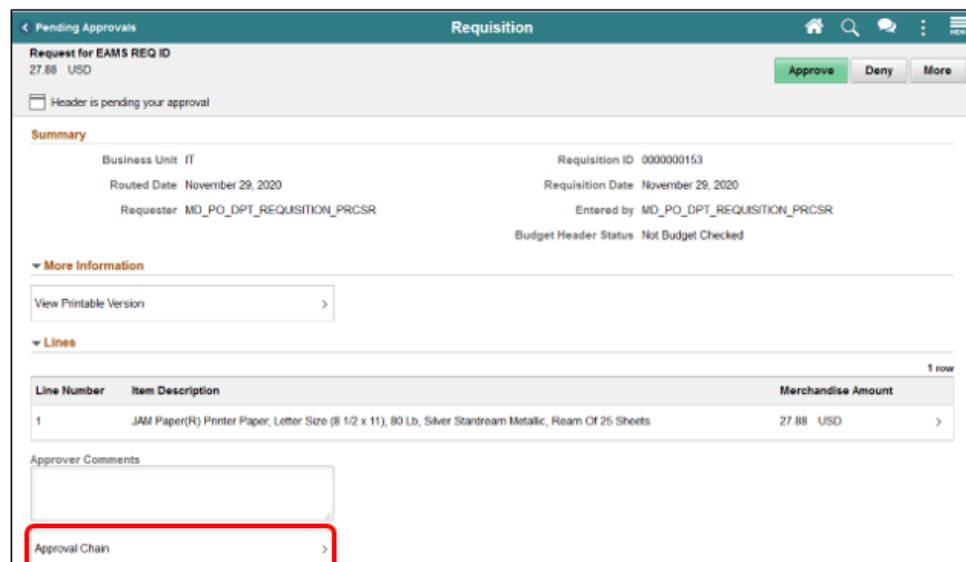
Lecture 4: Hold a Requisition

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

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



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



Line Number	Item Description	Merchandise Amount
1	JAM Paper(R) Printer Paper, Letter Size (8 1/2 x 11), 80 Lb, Silver Stardream Metallic, Ream Of 25 Sheets	27.88 USD

Lesson 3: Approve a Requisition

Lecture 4: Hold a Requisition

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

Approval Chain

MD Requisition Approval

▼ EAMS REQ ID

Pending

Start New Path

Department ID Approver

On Hold

MD_PO_DPT_REQ_APRVR1

Department Requisition Approv1

11/29/20 11:32 PM

Project ChartField Req Appvr

Skipped

No approvers found

Project Requisition Approver

Pending

Multiple Approvers

Error Step

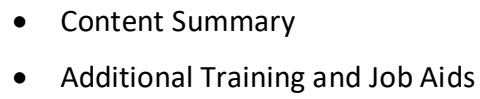
Lesson Summary



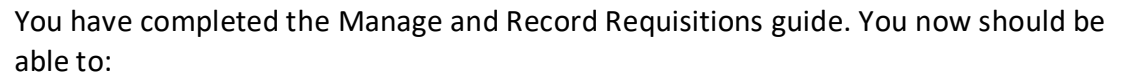
- Approve a Requisition
- Deny a Requisition
- Pushback a Requisition
- Hold a Requisition

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

Guide Summary The Guide Summary module covers two topics:



Objectives Achieved



- 94

Module 3: Summary

Additional Training and Job Aids

Other training materials, related to this topic, include:

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

You also have the following resources available to you:

- SCM 201 - Manage and Record Requisitions Job Aid
- [View and Print PDF Requisitions Job Aid](#)

For additional information, be sure to visit:

- Miamiidade.gov/informs

Module 3: Summary

Key Terms



The following key terms are used in this guide:

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

Module 3: Summary

Key Terms



The following key terms are used in this guide:

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

Module 3: Summary

Key Terms



The following key terms are used in this guide:

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

Module 3: Summary

Key Terms



The following key terms are used in this guide:

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