Miami-Dade County

Requisition Entry Job Aid

Version 1.0

TABLE OF CONTENTS

TABLE OF CONTENTS **2**

PURPOSE **2**

Purpose *2*

ACTIVITY 1: CREATING A REQUISITION **3**

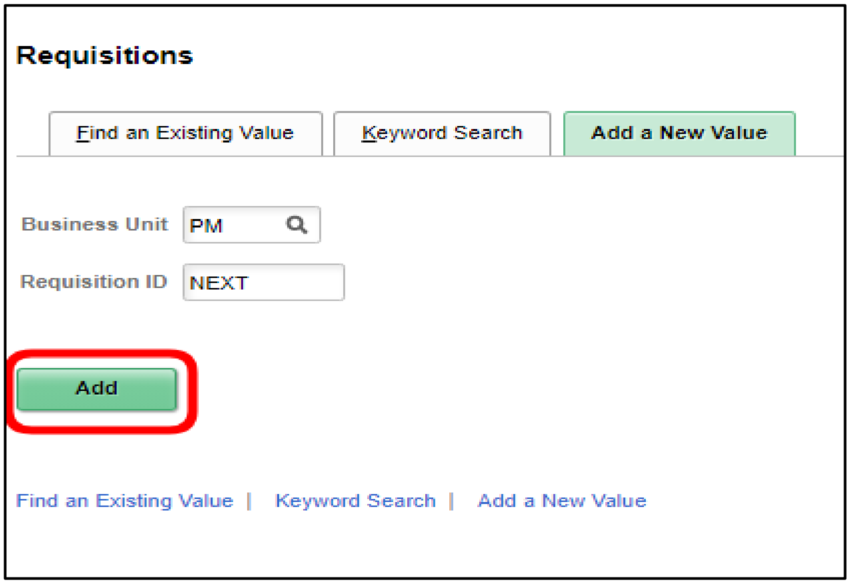
ACTIVITY 2: CREATING A FAVORITE **14**

PURPOSE

Purpose

This document explains the key activities involved in entering requisitions through the navigation menu. It provides an overview of the sub-processes involved, as well as step-by-step procedural guidance to perform the activity.

ACTIVITY 1: CREATING A REQUISITION

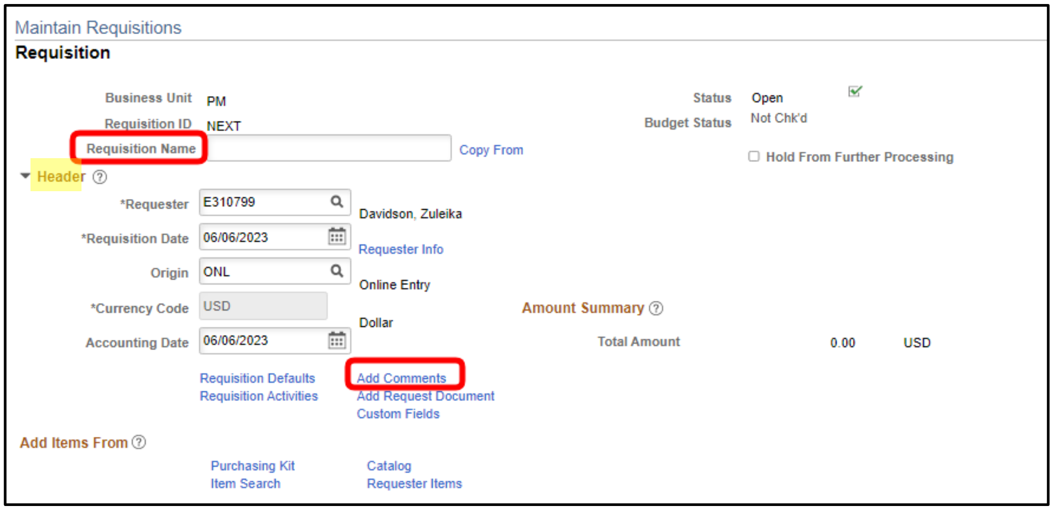
Step	Action
1.	Navigate to: **Menu > Navigator > Finance/Supply Chain (FSCM) > Purchasing > Requisitions > Add/Update Requisitions**
2.	Click on "Add" from the Add a New Value Tab. 

3.

At the requisition header, input details for Requisition Name and supporting documents within the Add Comments link.

Requisition Name: This field can be updated to reflect a description that makes it easier for the approver to identify.

IMPORTANT: Several departments will use this field to reflect the **EAMS Requisition ID**. This field will be required for the EAMS and INFORMS integration.

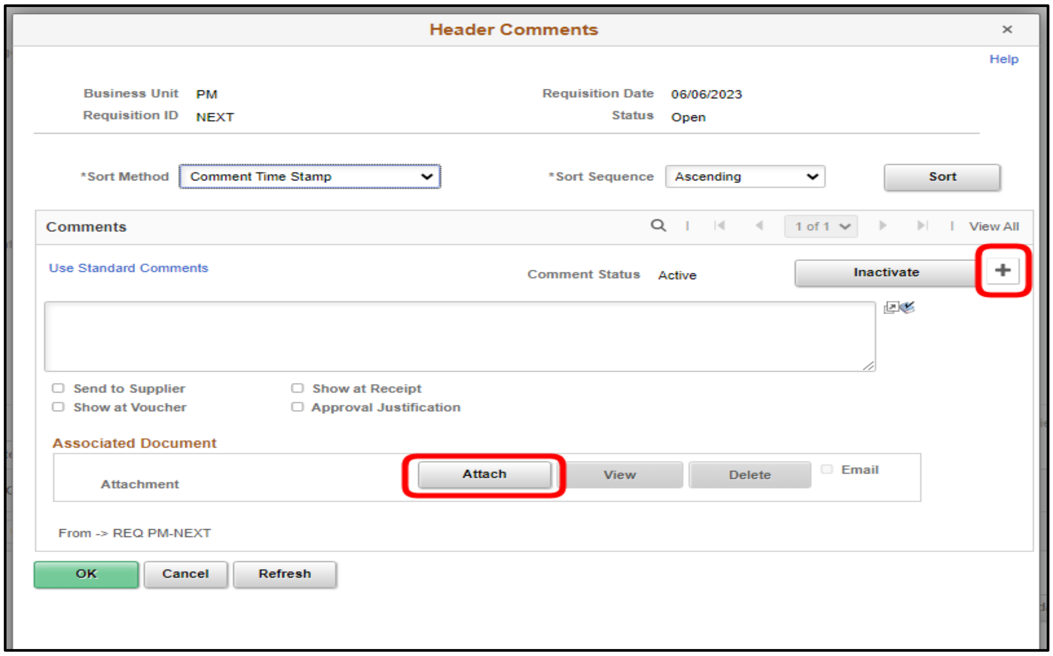


Add Comments- attach any related documentation, such as memorandums, pictures, quotes, etc., to the requisition. The 'Add Comments' functionality is available to display text on other transactions downstream (i.e., receipts and vouchers).

IMPORTANT: The requisitioner should include all market research (pictures, specifications, scope-of-work, etc.) associated with the item. The Buyer will leverage this information to create a sourcing event.

Once completed, click **"Ok."**

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td></td><td>



Note: More than (1) attachment can be added at the requisition header by clicking the "+" sign.

</td></tr>
</table>

4.

On the **"Details"** tab, enter the item's "Description" (be descriptive), "Quantity", "UOM" (unit of measure), "Category" (also known as commodity code), and "Price". **Note:** "Item" is not a required field to proceed with a requisition.

Description – This is a brief description of the item that is needed. This field is limited to 254 characters.

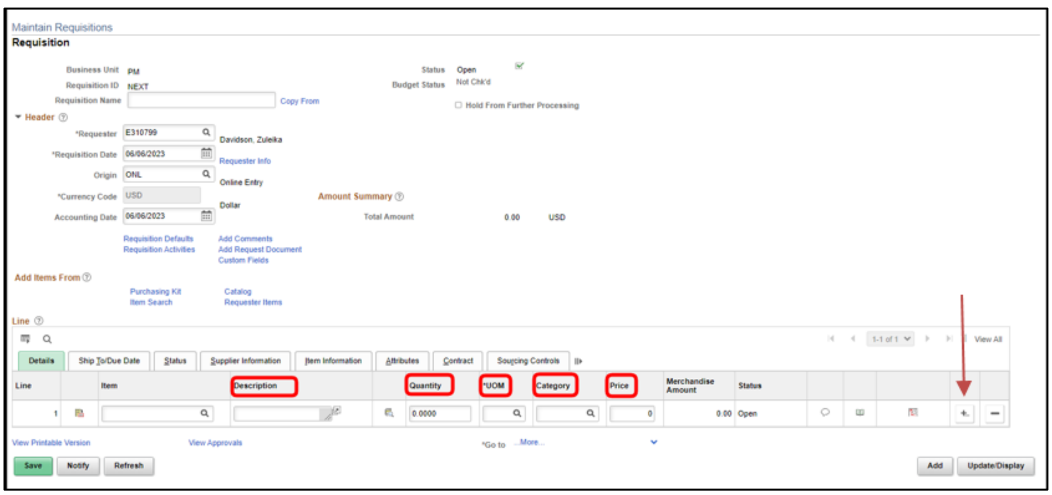
Quantity: This field can be updated to adjust the quantity of each specific item.

Unit of Measure (UOM) – Select the type of unit by which the item will be shipped to the requisitioner (e.g., EA, BX, LE). The use of "LOT" as a UOM is not recommended.

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.

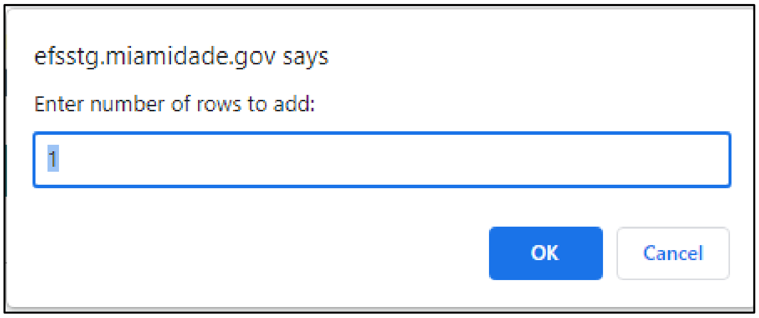
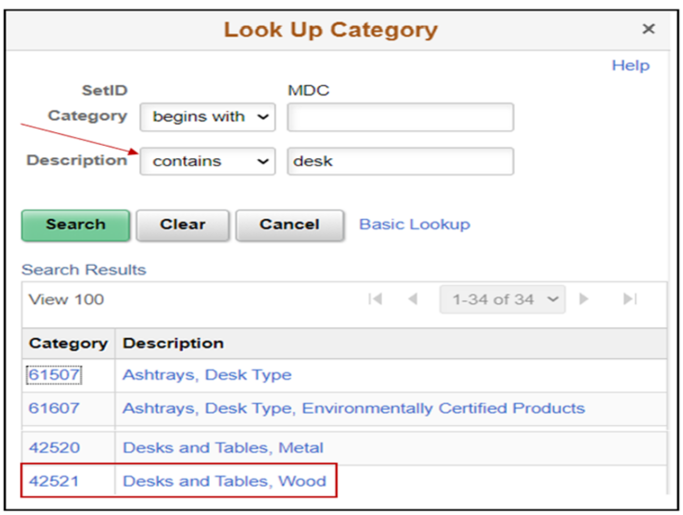
Note: The item category defaults the ACCOUNT value on the requisition distribution. This field can be updated accordingly.

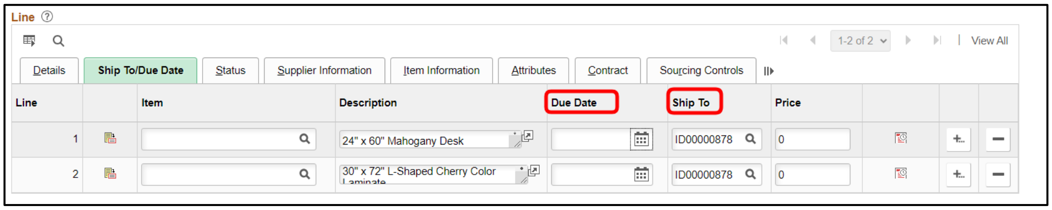
Price – The estimated unit cost of the item.

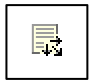


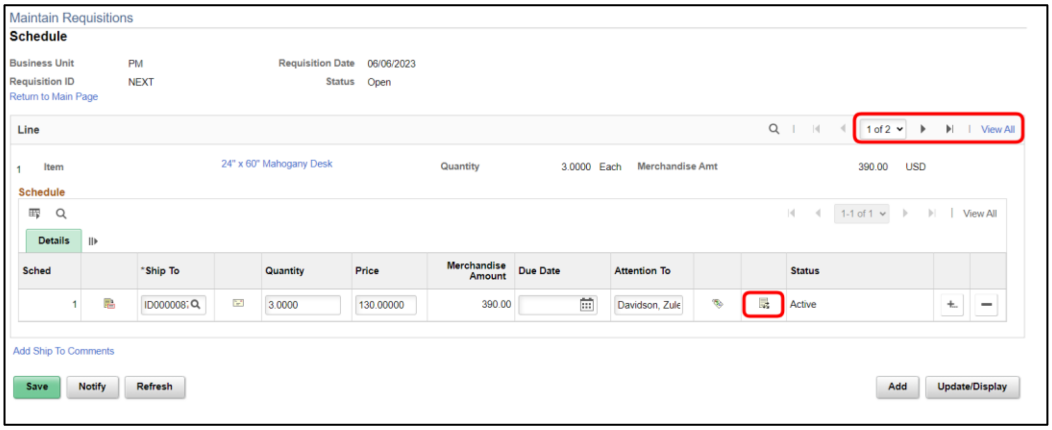
Click **+** at the end of any line to:

Add Multiple Rows- allows for the addition of other lines, as needed. Enter the number of rows required and click "Ok."

Step	Action
	
5.	If the category is unknown, click on the magnifying glass . Select **"contains"** on the **Description drop-down menu** and enter a general description of what you intend to purchase. For the purpose of this job aid, the category is **wood desk**, category # 42521.  If all items within the requisition are in the same category, **copy and paste** the number into the other requisition lines.

Step	Action
6.	On the **Ship To/Due Date** tab, update the **Due Date/ Ship To** fields. **Due Date**- defines what date items are expected to arrive at the SHIP TO location. **Ship To**- field designates where the goods will be received.  **Note:** The **Ship To** value can vary by requisition line. Most **Ship To** values have a 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.
7.	Once the requisition line(s) has been verified, select the **Schedule Detail** button which can be found on both the Details and Ship To/Due Date tabs. **Note:** The **Schedule Detail** page is the third layer of a requisition. It is used to review and modify schedule details for an item. 

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>8.</td><td>Once the schedule detail page has been reviewed or updated, click on the Distribution Icon . The system will display the Distribution page.



Note: You may select the "**View All**" hyperlink to view or input the schedule values.</td></tr>
</table>

9.

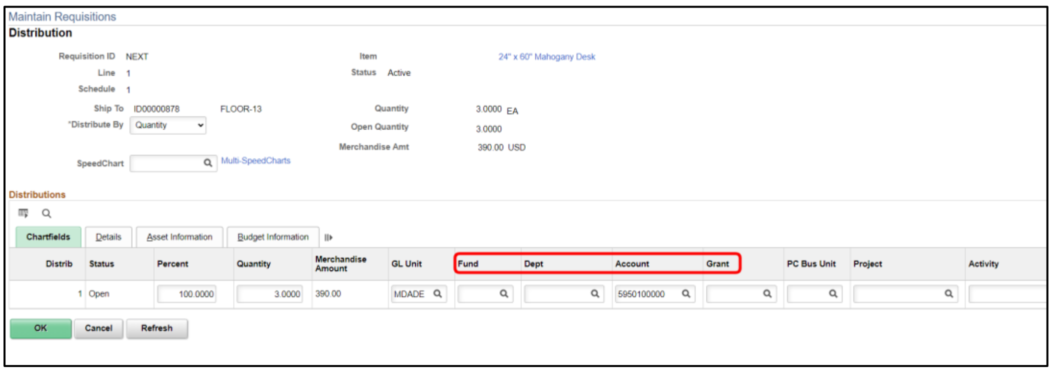
The Distribution Page is the fourth layer of a requisition used to enter accounting information. There are several tabs on this page, but we will only concentrate on the **ChartFields** and **Asset Information** tabs.

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

The **GL Business Unit** field will always display your defaulted BU value.

The **Account** value will default from the Item Category selected at the requisition line level.

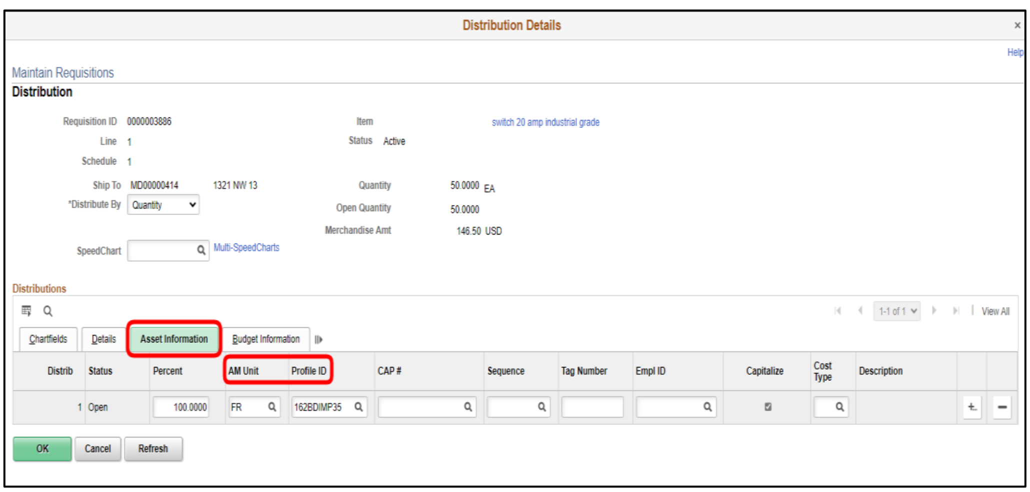
Enter the following values: **Fund Code**, **Department**, **Account**, **Grant**.



Note: The requisitioner must select an actual grant value if they intend to expense the goods or services against a grant. If not, the "**NO-GRANT**" value must be chosen.

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

- **PC Business Unit**: This field should reflect the Business Unit of the requestor.
- **Project**: This value is created in the Project Costing module.
- **Activity:** The activity value represents a subtask of a project in project costing (i.e., Planning, Design).
- **Source Type:** This source type field should only be used when the project is GOB funded.

Step	Action
10.	Capital Asset Information may also be captured through the Distribution Page for any capital asset. If no items in the requisition are of $5,000 value or higher, continue with requisition entry without completing this step. To itemize the capital asset information, click on "**Asset Information**" tab. **IMPORTANT**: The following fields are required when classifying an asset. • **AM Unit:** This field should reflect the Business Unit the capital asset is to be listed under. • **Profile ID:** ID designated by Capital Asset Management with a predetermined description detailing the asset. Use of magnifying glass is highly recommended. If unknown, contact the dept. Capital Asset Manager for the appropriate Profile ID. • **CAP #:** This number is the tagging of the item. Contact the dept. Capital Asser Manager, if number is unknown. 

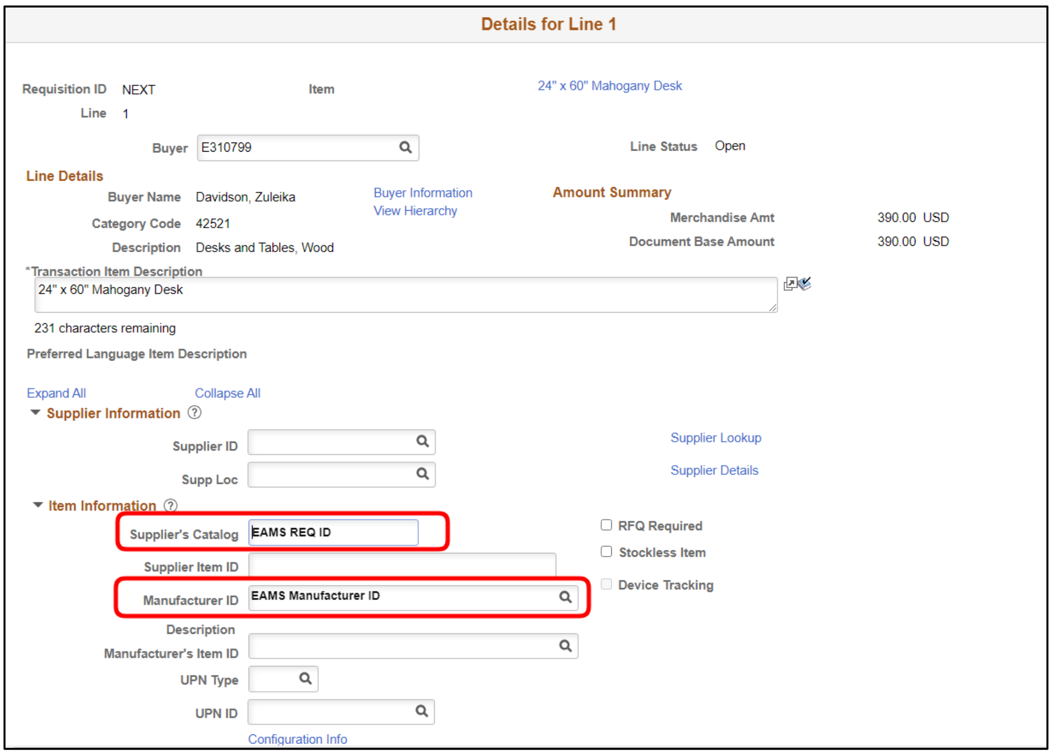
<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>11.</td><td>

IMPORTANT!

The following instruction is only for departments that leverage the **EAMS integration**.

Select the **Line Details** button on the Details Tab of the Requisition.

Note: The **Line Details** page is used to verify or edit additional details for a requisition line. As mentioned, all required fields will be highlighted for the EAMS integration.



1. Enter the **Supplier Catalog Number** value.

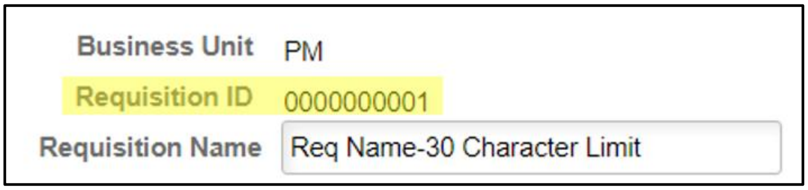
IMPORTANT: Several departments will use this to reflect the EAMS Requisition ID. This field is a required field for the EAMS and INFORMS integration.

2. Enter the **Manufacturer's Item ID** value.

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

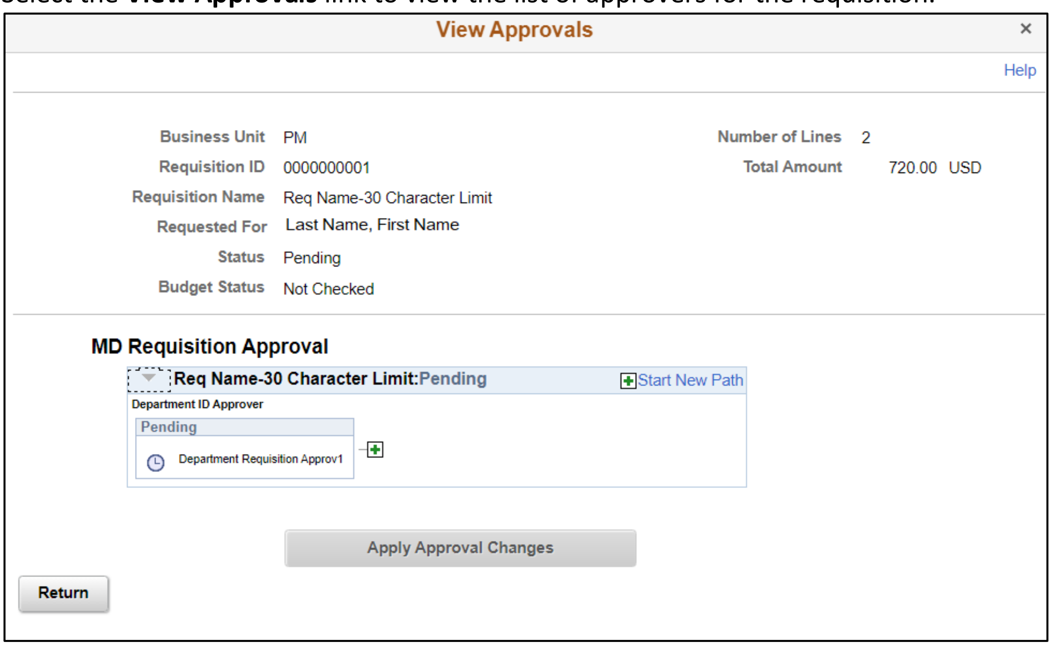
</td></tr>
</table>

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>12.</td><td>Once data entry is complete, click “Save”, a requisition number will be populated on the upper left corner of the requisition.



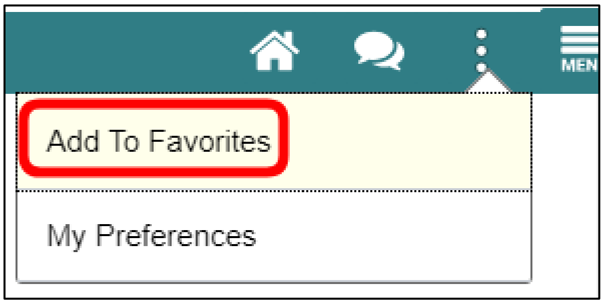
Note: It is best practice to name each requisition with a brief purchase overview.</td></tr>
<tr><td>13.</td><td>To submit for approval, click on the green checkmark in the upper right-hand corner of the requisition.

The “Status” will change from ‘Open’ to ‘Pending.’</td></tr>
<tr><td>14.</td><td>Select the View Approvals link to view the list of approvers for the requisition.


</td></tr>
</table>

ACTIVITY 2: CREATING A FAVORITE

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>1.</td><td>Navigate to the desired page and click on the ellipses located on the top right corner.

</td></tr>
<tr><td>2.</td><td>From the drop-down, select ‘Add to Favorites.’

</td></tr>
<tr><td>3.</td><td>Lastly, review and update if necessary the ‘Favorite Label’ and click the ADD button to save.

</td></tr>
</table>

Step	Action
4.	**Note**: The '**My Favorites**' icon is located on the Navbar and all previously saved pages can be found there.