



Miami-Dade County

Requisition Entry Job Aid

Version 1.0

TABLE OF CONTENTS

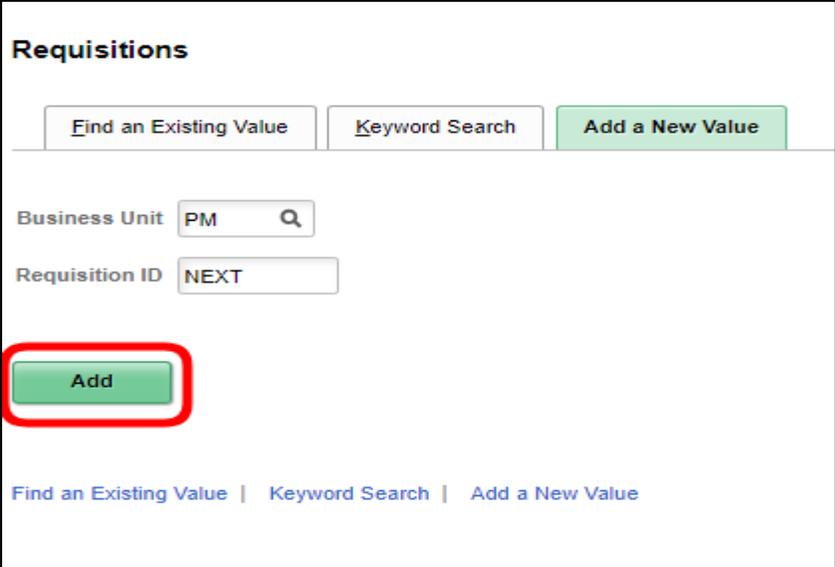
TABLE OF CONTENTS	2
PURPOSE.....	2
<i>Purpose.....</i>	<i>2</i>
ACTIVITY 1: CREATING A REQUISITION.....	3
ACTIVITY 2: CREATING A FAVORITE.....	14

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.  <p>The screenshot shows the 'Requisitions' page with three tabs: 'Find an Existing Value', 'Keyword Search', and 'Add a New Value'. The 'Add a New Value' tab is active. Below the tabs, there are input fields for 'Business Unit' (containing 'PM') and 'Requisition ID' (containing 'NEXT'). A green 'Add' button is highlighted with a red box. At the bottom, there are links for 'Find an Existing Value', 'Keyword Search', and 'Add a New Value'.</p>

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.

The screenshot shows the 'Maintain Requisitions' interface. The 'Requisition' header section includes the following fields and options:

- Business Unit: PM
- Requisition ID: NEXT
- Requisition Name: [Text Input Field] Copy From
- Status: Open (checked)
- Budget Status: Not Chk'd
- Header (dropdown menu)
- *Requester: E310799 (with search icon) Davidson, Zuleika
- *Requisition Date: 06/06/2023 (with calendar icon) Requester Info
- Origin: ONL (with search icon) Online Entry
- *Currency Code: USD Dollar
- Accounting Date: 06/06/2023 (with calendar icon)
- Amount Summary (table):

Amount Summary		
Total Amount	0.00	USD
- Links: Requisition Defaults, Requisition Activities, Add Comments (highlighted), Add Request Document, Custom Fields
- Add Items From (dropdown menu)
- Bottom Links: Purchasing Kit Item Search, Catalog Requirer Items

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."

Step	Action
	<p>Note: More than (1) attachment can be added at the requisition header by clicking the “+” sign.</p>

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.

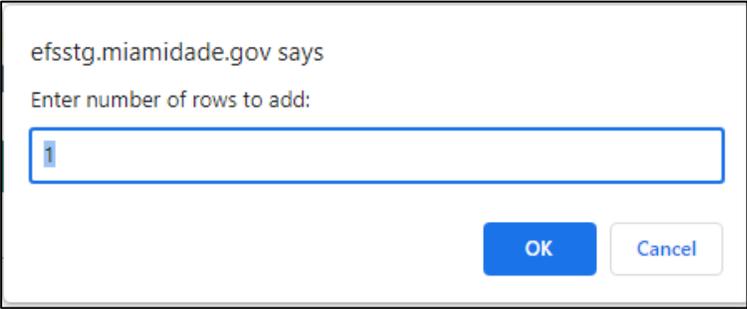
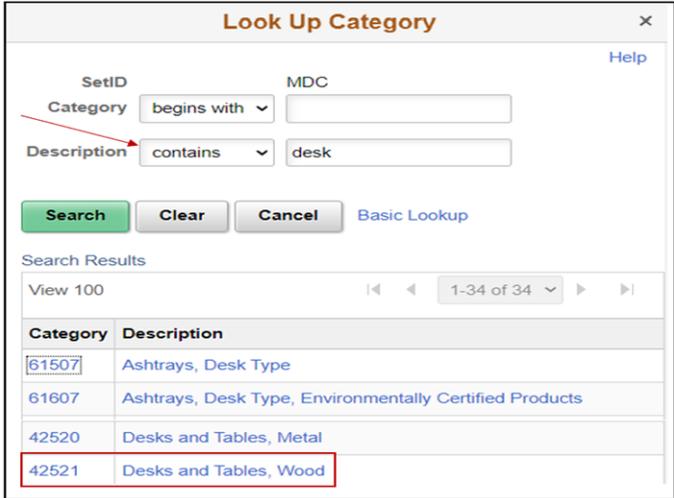
Note: The item category defaults the ACCOUNT value on the requisition distribution. This field can be updated accordingly.

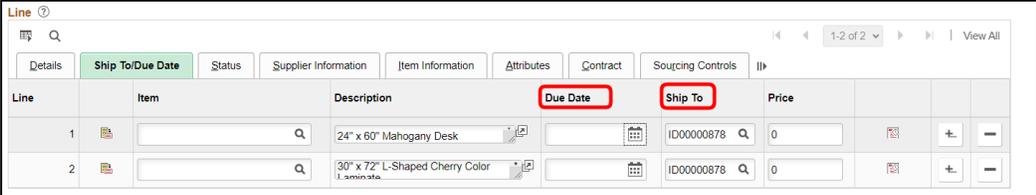
Price – The estimated unit cost of the item.

The screenshot shows the 'Maintain Requisitions' interface. At the top, there's a 'Requisition' header with fields for Business Unit (PM), Requisition ID (NEXT), and Status (Open). Below this is a 'Header' section with fields for Requester (E310799), Requestion Date (06/06/2023), Origin (OHL), and Currency Code (USD). An 'Amount Summary' section shows a Total Amount of 0.00 USD. Below the header is a table with columns: Line, Item, Description, Quantity, UOM, Category, Price, Merchandise Amount, and Status. The 'Description', 'Quantity', 'UOM', 'Category', and 'Price' columns are highlighted with red boxes. At the end of the table row, there is a '+' icon, which is pointed to by a red arrow.

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.	<p>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.</p> <p>For the purpose of this job aid, the category is wood desk, category # <u>42521</u>.</p>  <p>If all items within the requisition are in the same category, copy and paste the number into the other requisition lines.</p>

Step	Action
6.	<p>On the Ship To/Due Date tab, update the Due Date/ Ship To fields.</p> <p>Due Date- defines what date items are expected to arrive at the SHIP TO location.</p> <p>Ship To- field designates where the goods will be received.</p>  <p>Note: The Ship To value can vary by requisition line.</p> <p>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.</p>
7.	<p>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.</p> <p>Note: The Schedule Detail page is the third layer of a requisition. It is used to review and modify schedule details for an item.</p> 

Step	Action																
8.	<p>Once the schedule detail page has been reviewed or updated, click on the  Distribution Icon. The system will display the Distribution page.</p> <div data-bbox="370 489 1409 905" style="border: 1px solid black; padding: 5px;"> <p>Maintain Requisitions</p> <p>Schedule</p> <p>Business Unit: PM Requisition Date: 09/09/2023 Requisition ID: NEXT Status: Open Return to Main Page</p> <hr/> <p>Line 1 of 2 View All</p> <p>1 Item 24" x 60" Mahogany Desk Quantity: 3.0000 Each Merchandise Amt: 390.00 USD</p> <p>Schedule</p> <p>Details ></p> <table border="1"> <thead> <tr> <th>Sched</th> <th>*Ship To</th> <th>Quantity</th> <th>Price</th> <th>Merchandise Amount</th> <th>Due Date</th> <th>Attention To</th> <th>Status</th> </tr> </thead> <tbody> <tr> <td>1</td> <td>ID000008</td> <td>3.0000</td> <td>130.00000</td> <td>390.00</td> <td></td> <td>Davidson, Zule</td> <td>Active</td> </tr> </tbody> </table> <p>Add Ship To Comments</p> <p>Save Notify Refresh Add Update/Display</p> </div> <p>Note: You may select the “View All” hyperlink to view or input the schedule values.</p>	Sched	*Ship To	Quantity	Price	Merchandise Amount	Due Date	Attention To	Status	1	ID000008	3.0000	130.00000	390.00		Davidson, Zule	Active
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1	ID000008	3.0000	130.00000	390.00		Davidson, Zule	Active										

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.

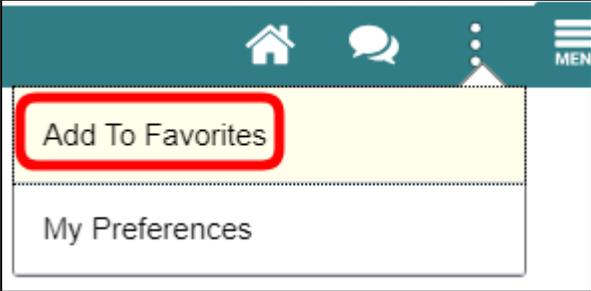
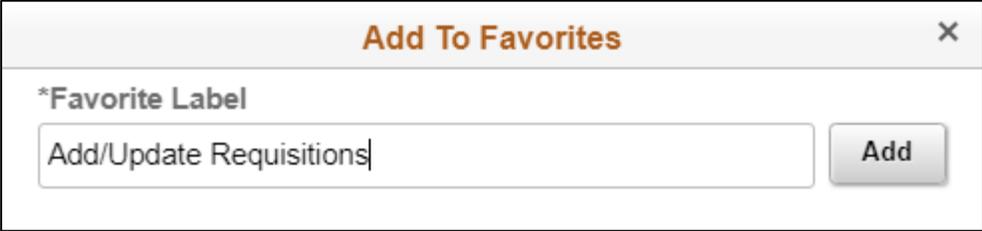
- **PC Business Unit:** This field should reflect the Business Unit of the requestor.
- **Project:** This value is created in the Project Costing module.
- **Activity:** The activity value represents a subtask of a project in project costing (i.e., Planning, Design).
- **Source Type:** This source type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

Step	Action																								
10.	<p>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.</p> <p>To itemize the capital asset information, click on “Asset Information” tab.</p> <p>IMPORTANT: The following fields are required when classifying an asset.</p> <ul style="list-style-type: none"> • 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. <div data-bbox="383 947 1401 1423" style="border: 1px solid black; padding: 5px; margin-top: 10px;"> <p style="text-align: right; font-size: small;">Distribution Details x</p> <p style="font-size: x-small;">Maintain Requisitions Help</p> <p>Distribution</p> <p>Requisition ID 000003886 Item switch 20 amp industrial grade Line 1 Status Active Schedule 1 Ship To MD00000414 1321 NW 13 Quantity 50.0000 EA *Distribute By Quantity Open Quantity 50.0000 Merchandise Amt 148.50 USD SpeedChart <input type="text"/> Multi-SpeedCharts</p> <p>Distributions</p> <p>Chartfields Details Asset Information Budget Information</p> <table border="1" style="width: 100%; border-collapse: collapse; font-size: x-small;"> <thead> <tr> <th>Distrib</th> <th>Status</th> <th>Percent</th> <th>AM Unit</th> <th>Profile ID</th> <th>CAP #</th> <th>Sequence</th> <th>Tag Number</th> <th>Empl ID</th> <th>Capitalize</th> <th>Cost Type</th> <th>Description</th> </tr> </thead> <tbody> <tr> <td>1</td> <td>Open</td> <td>100.0000</td> <td>FR</td> <td>162BDIMP35</td> <td></td> <td></td> <td></td> <td></td> <td>Y</td> <td></td> <td></td> </tr> </tbody> </table> <p>OK Cancel Refresh</p> </div>	Distrib	Status	Percent	AM Unit	Profile ID	CAP #	Sequence	Tag Number	Empl ID	Capitalize	Cost Type	Description	1	Open	100.0000	FR	162BDIMP35					Y		
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Step	Action
11.	<p>IMPORTANT!</p> <p>The following instruction is only for departments that leverage the EAMS integration.</p> <p>Select the Line Details button  on the Details Tab of the Requisition.</p> <p>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.</p> <div data-bbox="370 720 1406 1457" style="border: 1px solid black; padding: 10px;"> <p style="text-align: center; color: #c00000;">Details for Line 1</p> <p>Requisition ID NEXT Item 24" x 60" Mahogany Desk</p> <p>Line 1</p> <p>Buyer E310799 Line Status Open</p> <p>Line Details</p> <p>Buyer Name Davidson, Zuleika Buyer Information View Hierarchy Amount Summary</p> <p>Category Code 42521 Merchandise Amt 390.00 USD</p> <p>Description Desks and Tables, Wood Document Base Amount 390.00 USD</p> <p>*Transaction Item Description</p> <p>24" x 60" Mahogany Desk</p> <p>231 characters remaining</p> <p>Preferred Language Item Description</p> <p>Expand All Collapse All</p> <p>▼ Supplier Information ?</p> <p>Supplier ID Supplier Lookup</p> <p>Supp Loc Supplier Details</p> <p>▼ Item Information ?</p> <p>Supplier's Catalog EAMS REQ ID <input type="checkbox"/> RFQ Required</p> <p>Supplier Item ID <input type="checkbox"/> Stockless Item</p> <p>Manufacturer ID EAMS Manufacturer ID <input type="checkbox"/> Device Tracking</p> <p>Description</p> <p>Manufacturer's Item ID</p> <p>UPN Type</p> <p>UPN ID</p> <p style="text-align: center; color: #000080; font-size: small;">Configuration Info</p> </div> <p>1. Enter the Supplier Catalog Number value.</p> <p>IMPORTANT: Several departments will use this to reflect the EAMS Requisition ID. This field is a required field for the EAMS and INFORMS integration.</p> <p>2. Enter the Manufacturer's Item ID value.</p> <p>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.</p>

Step	Action																								
12.	<p>Once data entry is complete, click “Save”, a requisition number will be populated on the upper left corner of the requisition.</p> <div data-bbox="375 411 1170 590" style="border: 1px solid black; padding: 5px;"> <p>Business Unit PM</p> <p>Requisition ID 0000000001</p> <p>Requisition Name Req Name-30 Character Limit</p> </div> <p>Note: It is best practice to name each requisition with a brief purchase overview.</p>																								
13.	<p>To submit for approval, click on the green checkmark in the upper right-hand corner of the requisition.</p> <div data-bbox="370 747 1109 1010" style="border: 1px solid black; padding: 5px;"> <p>Status Open </p> <p>Budget Status Not Chk'd </p> <p><input type="checkbox"/> Hold From Further Processing</p> </div> <p>The “Status” will change from ‘Open’ to ‘Pending.’</p>																								
14.	<p>Select the View Approvals link to view the list of approvers for the requisition.</p> <div data-bbox="370 1100 1409 1724" style="border: 1px solid black; padding: 5px;"> <div style="text-align: right; border-bottom: 1px solid gray; padding-bottom: 5px;"> x Help </div> <table style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 30%;">Business Unit</td> <td>PM</td> <td style="width: 30%;">Number of Lines</td> <td>2</td> </tr> <tr> <td>Requisition ID</td> <td>0000000001</td> <td>Total Amount</td> <td>720.00 USD</td> </tr> <tr> <td>Requisition Name</td> <td colspan="3">Req Name-30 Character Limit</td> </tr> <tr> <td>Requested For</td> <td colspan="3">Last Name, First Name</td> </tr> <tr> <td>Status</td> <td colspan="3">Pending</td> </tr> <tr> <td>Budget Status</td> <td colspan="3">Not Checked</td> </tr> </table> <div style="margin-top: 10px;"> <p>MD Requisition Approval</p> <p>Req Name-30 Character Limit: Pending + Start New Path</p> <p>Department ID Approver</p> <div style="border: 1px solid gray; padding: 5px; margin-bottom: 5px;"> <p>Pending</p> <p> Department Requisition Approv1 +</p> </div> <p style="text-align: center; margin-top: 10px;">Apply Approval Changes</p> <p>Return</p> </div> </div>	Business Unit	PM	Number of Lines	2	Requisition ID	0000000001	Total Amount	720.00 USD	Requisition Name	Req Name-30 Character Limit			Requested For	Last Name, First Name			Status	Pending			Budget Status	Not Checked		
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ACTIVITY 2: CREATING A FAVORITE

Step	Action
1.	<p>Navigate to the desired page and click on the ellipses located on the top right corner.</p> 
2.	<p>From the drop-down, select 'Add to Favorites.'</p> 
3.	<p>Lastly, review and update if necessary the 'Favorite Label' and click the ADD button to save.</p> 

Step	Action
4.	<p data-bbox="365 325 1388 394">Note: The 'My Favorites' icon is located on the NavBar and all previously saved pages can be found there.</p>  <p>The screenshot shows a vertical navigation bar (NavBar) with a gear icon in the top right corner. Below the gear icon are four items: 'Recent Places' with a calendar icon, 'My Favorites' with a yellow star icon (highlighted by a red rounded rectangle), and 'Navigator' with a document icon.</p>