



Miami-Dade County

Requisition Entry

Version 1.0

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PURPOSE AND DESCRIPTION

Purpose

This document explains the key activities involved in Entering Requisitions. It provides an overview of the sub-processes involved, as well as step-by-step procedural guidance to perform the activity.

WHAT IS A SPECIAL REQUEST?

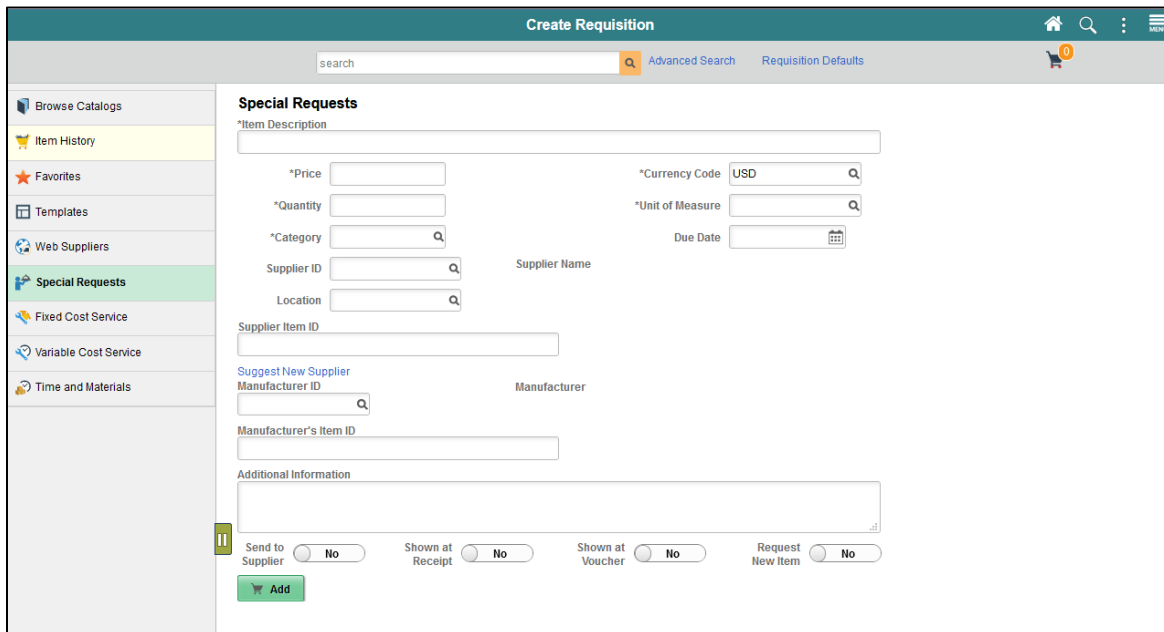
A **Special Request** is used to create a request for goods or/and services.

Common fields used in a Special Request:

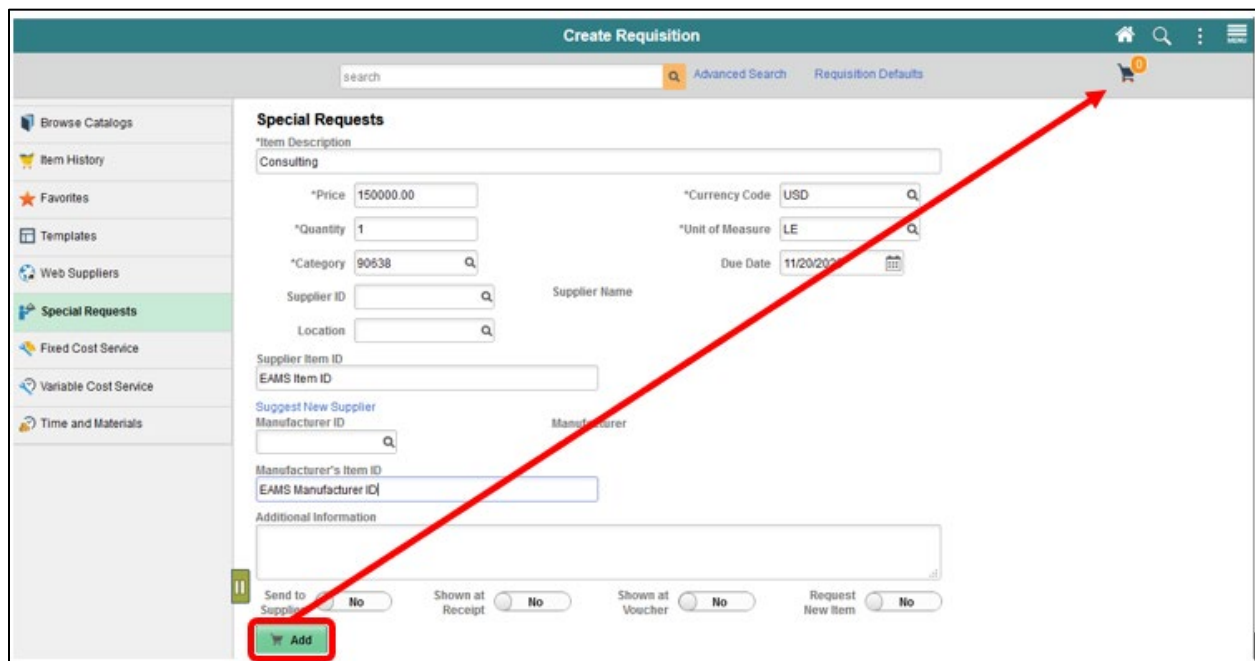
- **Additional Information** – Enter additional information that helps describe or support a special request.
- **Category** – The 5-digit NIGP item category to which this item or service belongs. The category ID enables the system to retrieve default values for the requisition.
- **Due Date** – The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

CREATING A REQUISITION

1. Navigate to the **Create Requisition** page: **Finance/Supply Chain (FSCM) > Supply Chain Operations > eProcurement > Create Requisition > Special Requests**



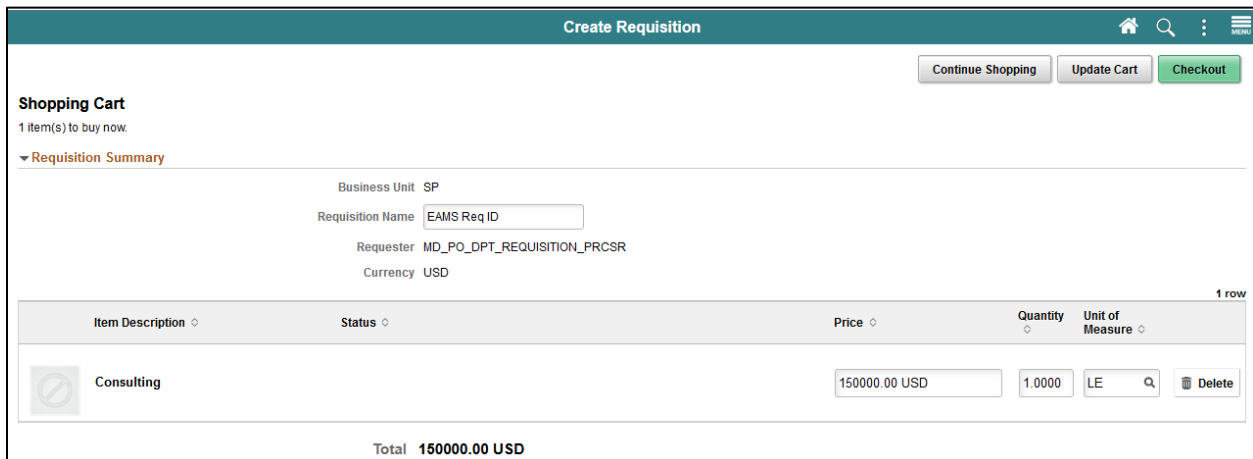
2. Once all required fields have been selected and entered, select the **Add** button to update the shopping cart with the special request item.



3. Select the **Shopping Cart** button to confirm all line items, quantities, and costs are correct.

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

- **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.
- **Quantity:** This field can be updated to adjust the quantity of each specific item.
- **Delete:** If any item(s) need to be removed from the shopping cart, this button can be used.
- **Continue Shopping:** This button can be selected to return to the Miami-Dade Item Catalog to add additional items.
- **Update Cart:** If changes have been made to the shopping cart, it will be necessary to select this button to update and 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

Total 150000.00 USD

4. Once the Shopping Cart has been confirmed, select the **Checkout** button.

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

5. In the **Checkout** page, the requisitioner will:
 - 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, INFORMS will use the Requisition ID as the name.
 - Select the appropriate **Priority** value: low, medium, or high. The approver will have visibility to the priority value the requisitioner selects.



Create Requisition

Continue Shopping Save Submit

Order Total 150000.00 USD

Checkout

Requisition Summary

Business Unit SP

Requisition Name EAMS Req ID

Priority Medium

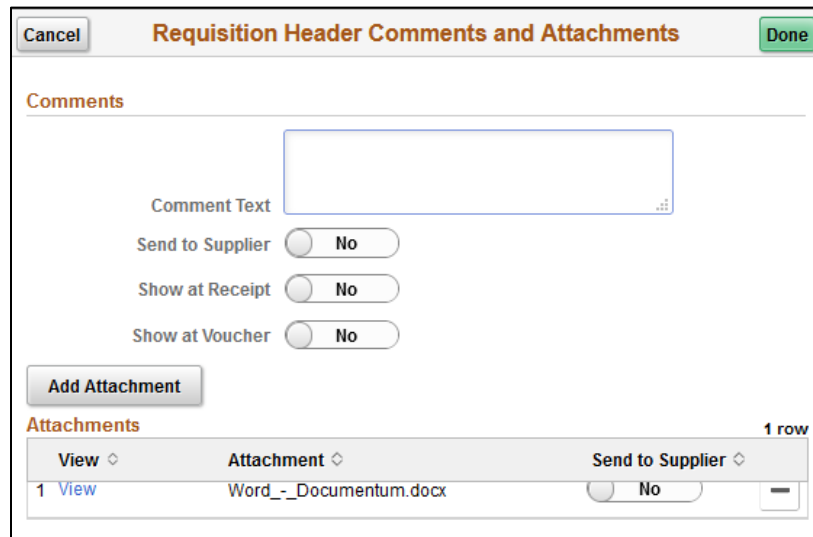
Header Comments/Attachments

Requester MD_PO_DPT_REQUISITION_PRCR

Currency USD

6. Select the **Header Comments/Attachments** button to enter comment text and add complimentary attachments. The additional comment functionality is available to display text on other transactions downstream (i.e. receipts and vouchers).

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



Cancel **Requisition Header Comments and Attachments** Done

Comments

Comment Text

Send to Supplier No

Show at Receipt No

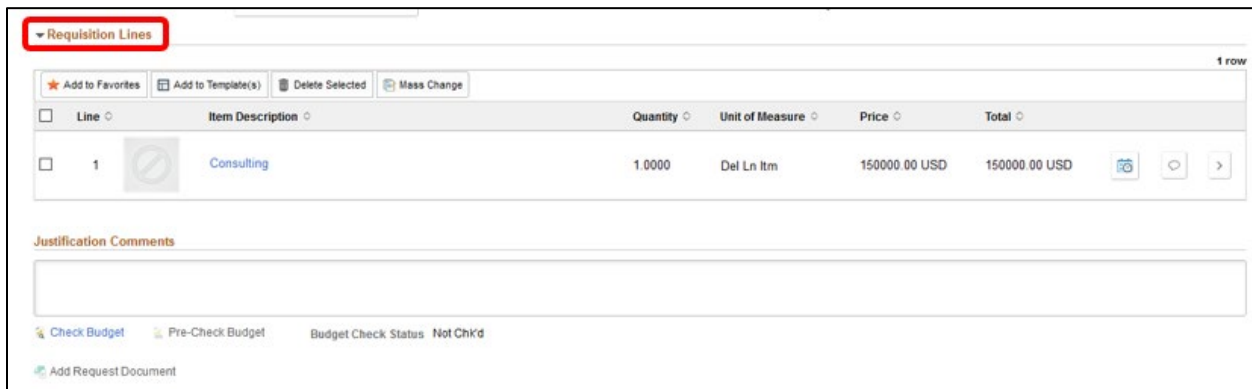
Show at Voucher No

Add Attachment

Attachments 1 row

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

7. View the **Requisition Lines** section, also known as the “Line”, to display item details, add functionality, and access the other requisition layers.
 - **Add to Favorite:** This button is used to add selected lines to the favorites list for future use.
 - **Delete Selected:** This button deletes the selected requisition line(s).



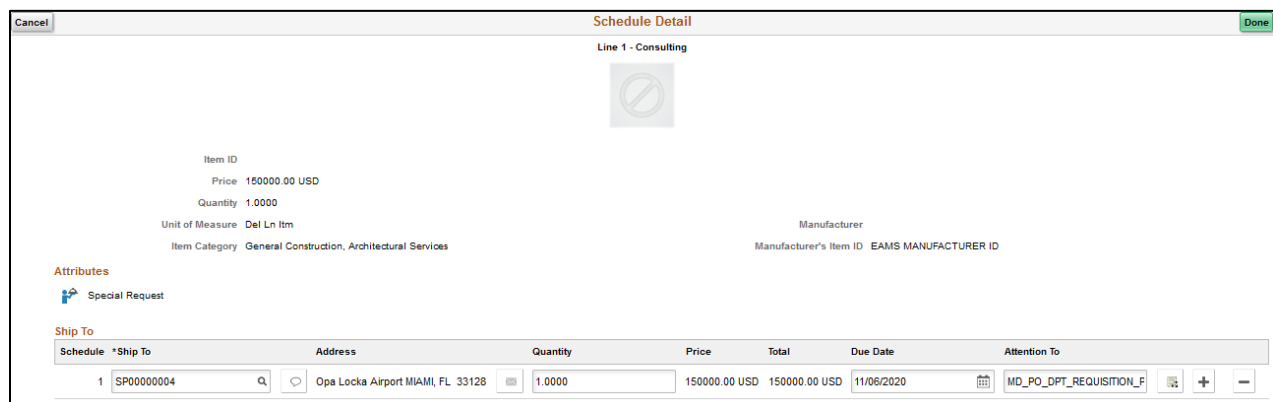
8. Once the requisition line has been verified, select the **Schedule Detail** button.

Note: The **Schedule Detail** page is the third layer of a requisition. It is used to review and modify schedule details for an item.

9. Review or update the **Ship To** field. This field designates where the goods were received.

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

10. Update the **Due Date** field. This field defines what date items are expected to arrive at the SHIP TO location.



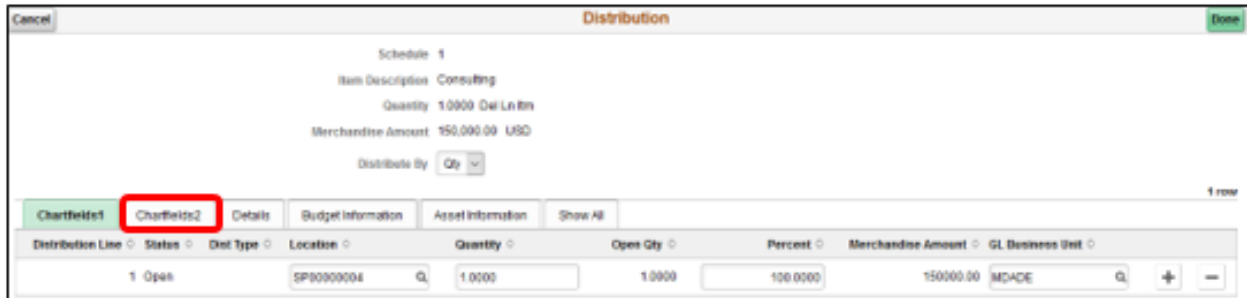
11. Select the **Distribution** icon once the schedule detail page has been reviewed or updated. The system will route to the Distribution page.

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

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

The **GL Business Unit** field will always display “MDADE” as a default value.

12. Select the **ChartField2** tab.



The screenshot shows the 'Distribution' form with the 'ChartField2' tab selected. The form displays the following information:

- Schedule: 1
- Item Description: Consulting
- Quantity: 1.0000 Del Ln Itm
- Merchandise Amount: 150,000.00 USD
- Distribute By: Qty

The 'ChartField2' tab is highlighted with a red box. Below the tabs, the 'Distribution Line' section shows:

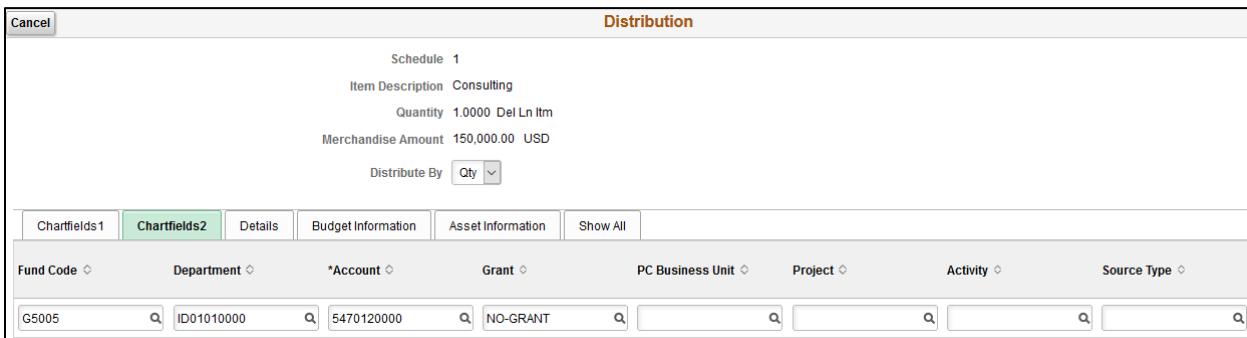
Distribution Line	Status	Dist Type	Location	Quantity	Open Qty	Percent	Merchandise Amount	GL Business Unit
1	Open		SP00000006	1.0000	1.0000	100.0000	150000.00	MDADE

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

Note: If this item is expensed, the requisitioner must enter an actual grant. If not, the “NO-GRANT” value must be selected.

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

- **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.



The screenshot shows the 'Distribution' form with the 'ChartField2' tab selected. The form displays the following information:

- Schedule: 1
- Item Description: Consulting
- Quantity: 1.0000 Del Ln Itm
- Merchandise Amount: 150,000.00 USD
- Distribute By: Qty

The 'ChartField2' tab is highlighted. Below the tabs, the 'Fund Code' section shows the following fields populated:

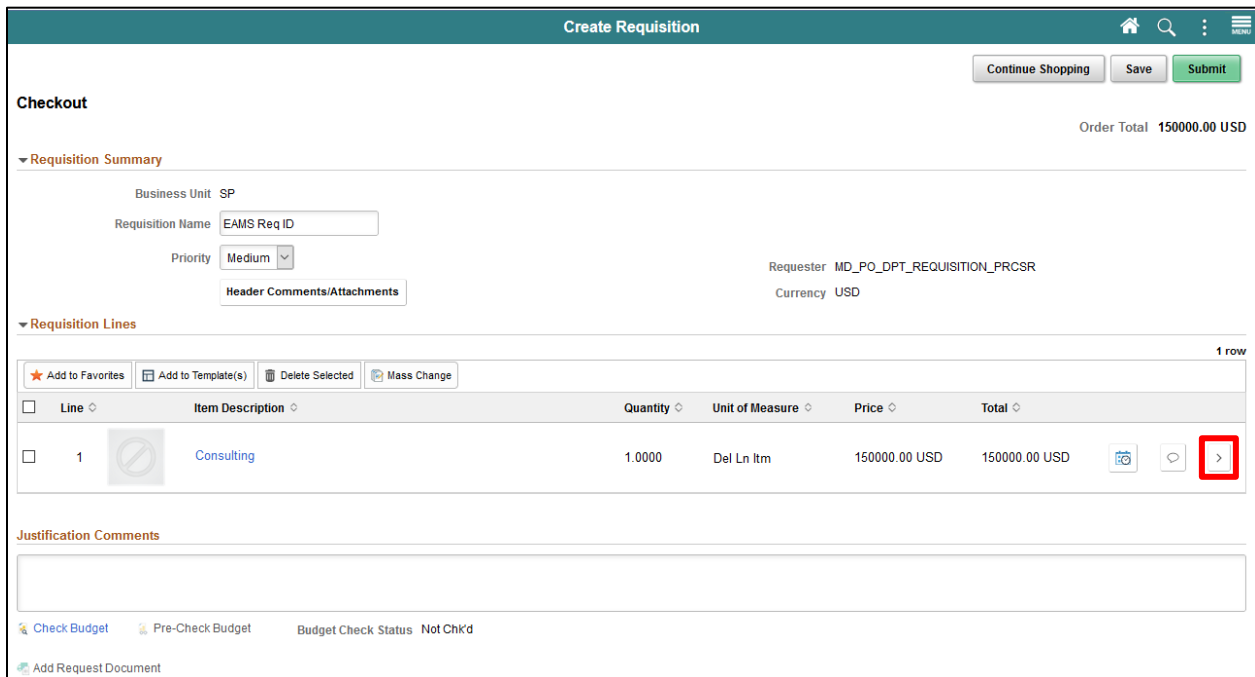
Fund Code	Department	*Account	Grant	PC Business Unit	Project	Activity	Source Type
G5005	ID01010000	5470120000	NO-GRANT				

14. Once all ChartFields have been confirmed and selected, select the **Done** button. User will be returned to the Checkout page.

IMPORTANT: The following instruction is for departments who leverage the EMAS and INFORMS integration.

15. Select the **Line Details** button.

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



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	Line Details

Justification Comments

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

Add Request Document

16. 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.


17. Enter the **Manufacturer's Item ID** 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.

18. Select the **Done** button when updates and relevant fields are verified. User will be returned to the Checkout page.

Cancel
Line Details
Done

Line 1 - Consulting



Item Details

Item ID
Price 150000.00 USD
Quantity 1.0000
Unit of Measure Dal Ln itm
Item Category General Construction, Architectural Services
Original Substituted Item
Long Description

Physical Nature Services
Buyer BURHST
Buyer Information
Show Configurator

Attributes

Special Request

Item Additional Information

Contract Information

Use Contract if Available Yes
Contract ID
Contract Version

Contract Line
Category Line
Contract Details

Supplier Information

Supplier ID
Supplier Location

Supplier's Catalog Number EAMS REQ ID
Item Supplier Priority

Suggest New Supplier

Manufacturer Information

Manufacturer ID
Manufacturer's Item ID EAMS MANUFACTURER ID
UPN Type
UPN ID

Manufacturer

Procurement Group Information

Sourcing Controls

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.

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

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_PRCRS

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

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

Create Requisition

My Requisitions

Create New Requisition

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

View Print

Check Budget

Pre-Check Budget

Budget Check Status Not Chk'd

20. Select the **View Approval Chain** button to view the list of approvers for the requisition.

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

Approval Flow