



Course ID: SCM 201

Course: Manage and Record Requisitions

Ground Rules



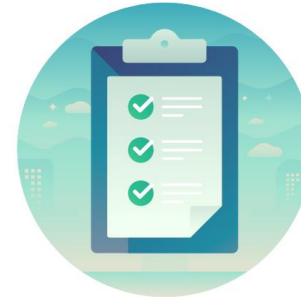
Be on time



Turn off your cell phones when in class



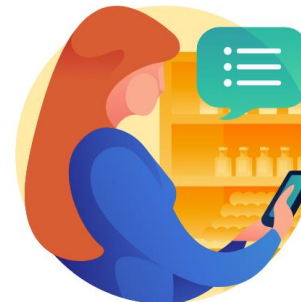
Participate actively in class; refrain from email and internet use



Attendance



Take breaks as needed



Feel free to ask questions

Course Overview

Course Description	<p>This course provides a comprehensive review of Managing and Recording Requisitions</p> <p>This course consists of the following modules:</p> <ul style="list-style-type: none">• Module 1: Course Introduction• Module 2: Manage and Record Requisitions• Module 3: Manage a Requisition• Module 4: Course Summary
Training Audiences	<ul style="list-style-type: none">• Department Requisition Processor• Department Buyer• Department PO Processor
Prerequisites	<ul style="list-style-type: none">• ERP 101 – Overview of ERP• ERP 102 – INFORMS Navigation, Reporting, and Online Help• SCM 101 – Supply Chain Management Fundamentals
Estimated Duration	<ul style="list-style-type: none">• 2 Hours and 30 Minutes

Course Outline

Content

Module 1: Course Introduction

Module 2: Manage and Record Requisitions

- Lesson 1: Creating a Requisition From the Master Item Catalog
 - Lecture 1: Selecting an Item
 - Lecture 2: Creating a Requisition from the Master Item Catalog
 - Lecture 3: Creating a Requisition from Web Suppliers
 - Lecture 4: Creating a Special Request

Module 3: Managing a Requisition

- Lesson 1: Manage a Requisition
 - Lecture 1: Copy a Requisition
 - Lecture 2: Edit a Requisition
 - Lecture 3: View and Print a Requisition

Course Outline

Content

Module 3: Manage a Requisition (cont.)

- Lesson 1: Manage a Requisition
 - Lecture 4: Cancel a Requisition
- Lesson 2: Approving a Requisition
 - Lecture 1: Approve a Requisition
 - Lecture 2: Deny a Requisition
 - Lecture 3: Pushback a Requisition
 - Lecture 4: Hold a Requisition

Module 4: Course Summary

Module 1: Course Introduction

Module Topics

Course Administration and Logistics

Learning Objectives

Roles and Responsibilities

Navigation

Key Changes to the Business Process

The End-to-End Business Process

Introduction to Demonstrations, Activities, and Exercises

Course Administration and Logistics



To receive credit for completing this course, you must record your attendance at the beginning and end of class



Actively participate in class



Ask questions; this is your time to learn



Please turn off your cell phones and refrain from checking email and the Internet while in class



Take Breaks at scheduled times



Be back from Breaks on time

Learning Objectives

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

- Have a high-level 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 requisition approval process

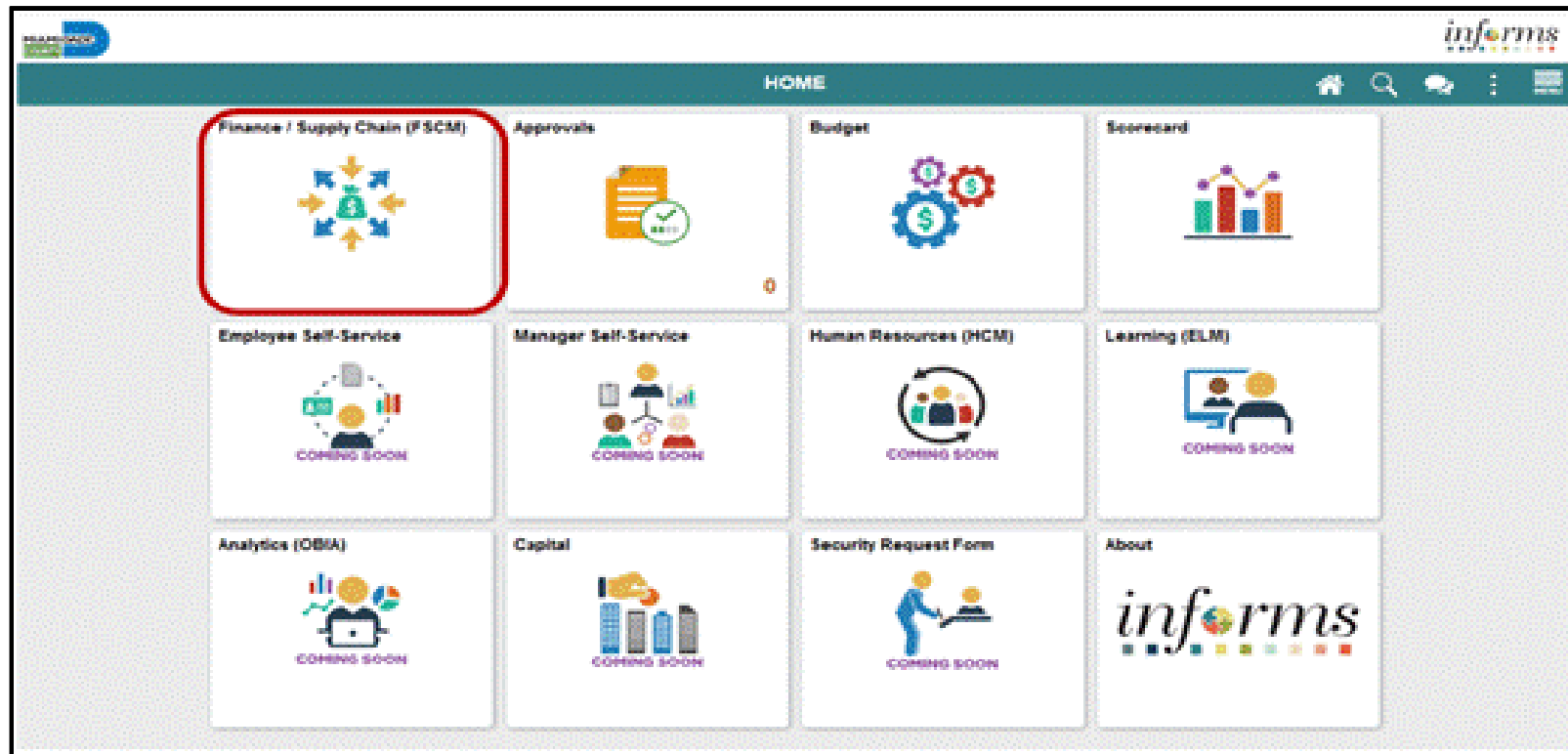
Roles and Responsibilities

The roles and responsibilities associated with Receivables Processing include:

Role	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.

Navigation

1. Login to INFORMS and select **Finance/ Supply Chain (FSCM)** from the home landing page below.



Navigation

2. Select **Supply Chain Operations**



Navigation

3. Select eProcurement



Navigation

4. Select **Create Requisition**



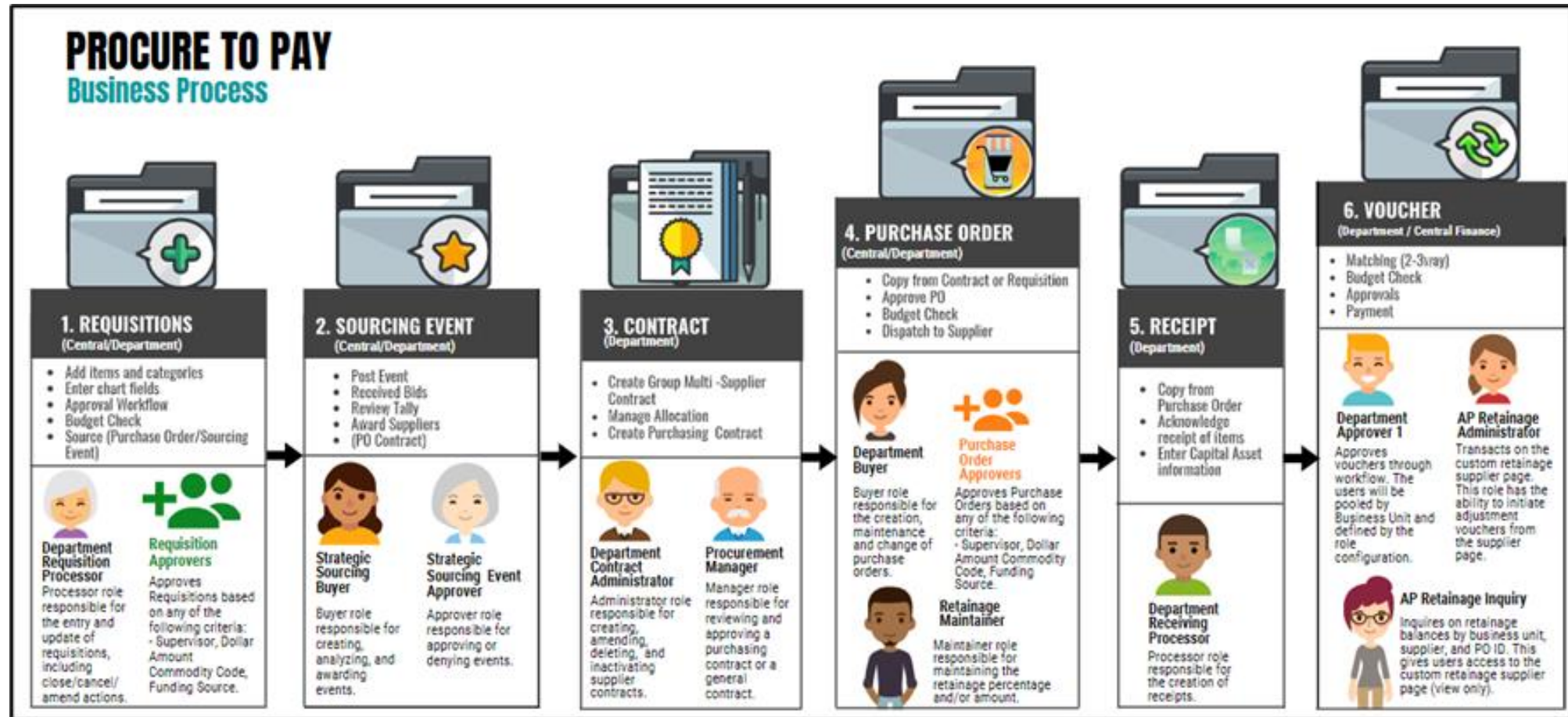
The Key Changes in the Business Process

- INFORMS is the system of record for requisitions
 - Transit is the only department integrating EAMS requisitions.
 - Requisitions can be sourced to a purchase order or sourcing event.
- The adoption of the National Institute of Government Purchasing (NIGP) item and category taxonomy.
 - Item Categories (5 Digits)
 - Items (7 or 11 Digits)
- Standard requisition workflow
 - Dollar Thresholds
 - Item Categories
 - ChartField Values

The Key Changes in the Business Process

- Web Suppliers
 - Office Depot
 - Grainger

The End-to-End Business Process



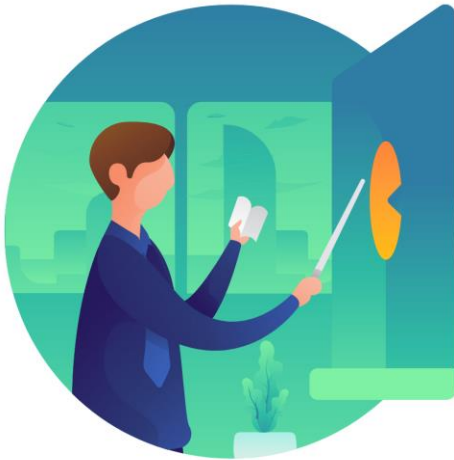
The End-to-End Business Process

The INFORMS Procure-to-pay process consists of the following high-level steps:

- Requisitions
- Sourcing Event
- Contract
- Purchase Order
- Receipt
- Voucher

Introduction to Demonstrations, Activities, and Exercises

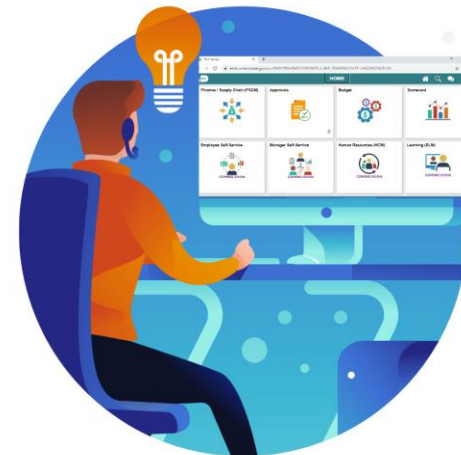
- Users will take part in three types of hands-on learning throughout this course: Instructor Demonstrations, Training Activities, and Training Exercises.



Instructor
Demonstrations



Training
Activities



Training
Exercises

Module 1: Course Introduction Summary

Module Topics

Course Administration and Logistics

Learning Objectives

Roles and Responsibilities

Navigation

Key Changes to the Business Process

The End-to-End Business Process

Introduction to Demonstrations, Activities, and Exercises

Module 2: Manage and Record Requisitions

Module Topics

Module Introduction



- Lesson 1: Create a Requisition
 - Lecture 1: Selecting an Item
 - Lecture 2: Creating a Requisition from the Master Item Catalog
 - Lecture 3: Creating a Requisition from Web Suppliers
 - Lecture 4: Creating a Special Request

Lecture 1: Selecting an Item

Selecting an Item: The INFORMS system provides several methods for adding items to a requisition. In this lecture, the methods will be introduced, and in the lectures that follow, there will be a deeper dive into several of the options.

Lecture 1: Selecting an Item

Catalogs






▼ **Item Category**




- ☐ Recycled Office Supplies (561)
- ☐ Recycled Office Furniture:
Bookshelves, Chairs, Credenzas,
C (86)
- ☐ Envelopes: Clasp, String, etc. (6)
- ☐ Office Machines, Equipment,
Accessories, and Supplies,
Recyc (2)
- ☐ Recycled Office Furniture: File

Search Results

Items 1 through 50


Items


 Compare


	42565202605  "CABINETS, RECYCLED, LATERAL FILING, 36 IN. WIDE, 5 ROLL OUT SHELVES W/RECEDING DOOR, 1 POSTING SHELF, POLISHED Supplier	\$ 0.0000 Units 	Supplier ID Supplier Item ID Manufacturer ID Manufacturer Mfg Item ID Lead Time Days
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Lecture 1: Selecting an Item


Web Supplier (Punchout)

 Browse Catalogs



 Item History

 Favorites

 Templates


 **Web Suppliers**


Web Suppliers


	Grainger Punch Out
	Office Depot Punch Out


Lecture 1: Selecting an Item


Special Request


 Browse Catalogs

 Item History

 Favorites

 Templates

 Web Suppliers

 **Special Requests**

Special Requests

*Item Description

*Price

*Currency Code

*Quantity

*Unit of Measure

*Category


Due Date

Supplier ID





Supplier Name

Lecture 1: Selecting an Item

Express Item Entry


Express Item Entry 



Line

Personalize | Find | View All |  |  First  1 of 1  Last

Details

Supplier Information

Item Information 

	Item ID	Description	Quantity	UOM	Category	Price	Merchandise Amount	Currency		
1	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>		USD		

Add to Cart

Lecture 1: Selecting an Item

Favorites

Browse Catalogs

Item History

Favorites

Templates

Web Suppliers

Special Requests

Fixed Cost Service

Favorites

Add

Add to Template(s)

Delete Selected

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

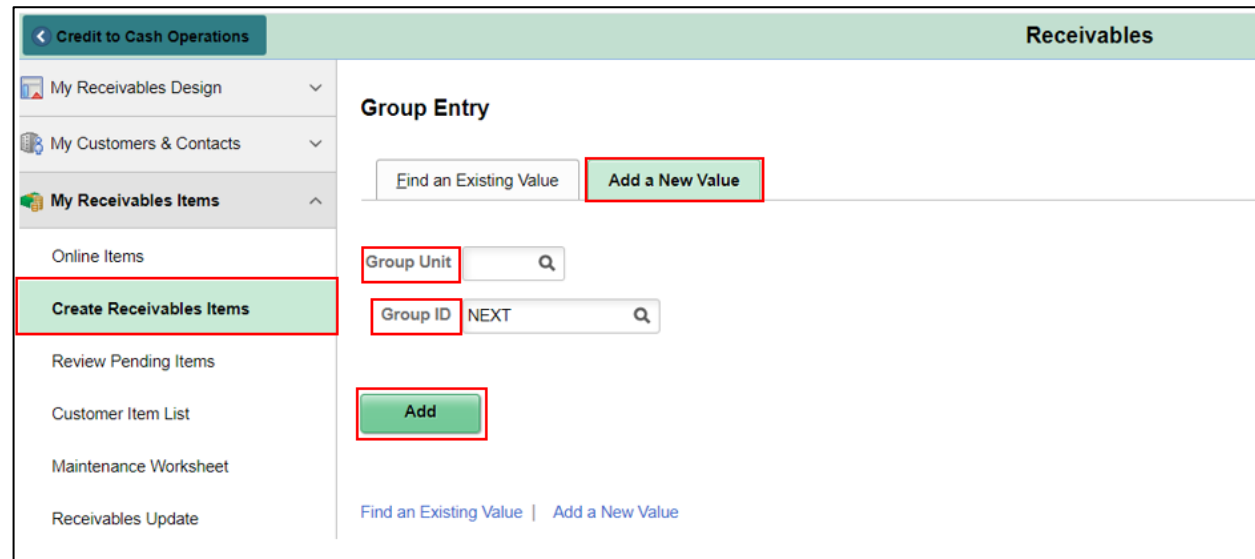
Templates

MIAMI-DADE
COUNTY

Lecture 1: How to Create Items Manually Online

Most of the time, item processors will not have to manually create pending items. In the case that they do, users must navigate to the **Create Receivables Items** page.

- **Finance/Supply Chain (FSCM) > Credit to Cash Operations > Receivables > My Receivables Items > Create Receivable Items**



The screenshot shows the 'Create Receivables Items' page within the 'Credit to Cash Operations' section. The left sidebar contains a menu with the following items: 'My Receivables Design', 'My Customers & Contacts', 'My Receivables Items' (expanded), 'Online Items', 'Create Receivables Items' (highlighted with a red box), 'Review Pending Items', 'Customer Item List', 'Maintenance Worksheet', and 'Receivables Update'. The main content area is titled 'Receivables' and 'Group Entry'. It features two buttons at the top: 'Find an Existing Value' and 'Add a New Value' (highlighted with a red box). Below these are two input fields: 'Group Unit' and 'Group ID' (with 'NEXT' next to it), both highlighted with red boxes. At the bottom of the main area is a green 'Add' button, also highlighted with a red box. At the very bottom of the page, there are links for 'Find an Existing Value' and 'Add a New Value'.

Lecture 1: Activities and Exercises

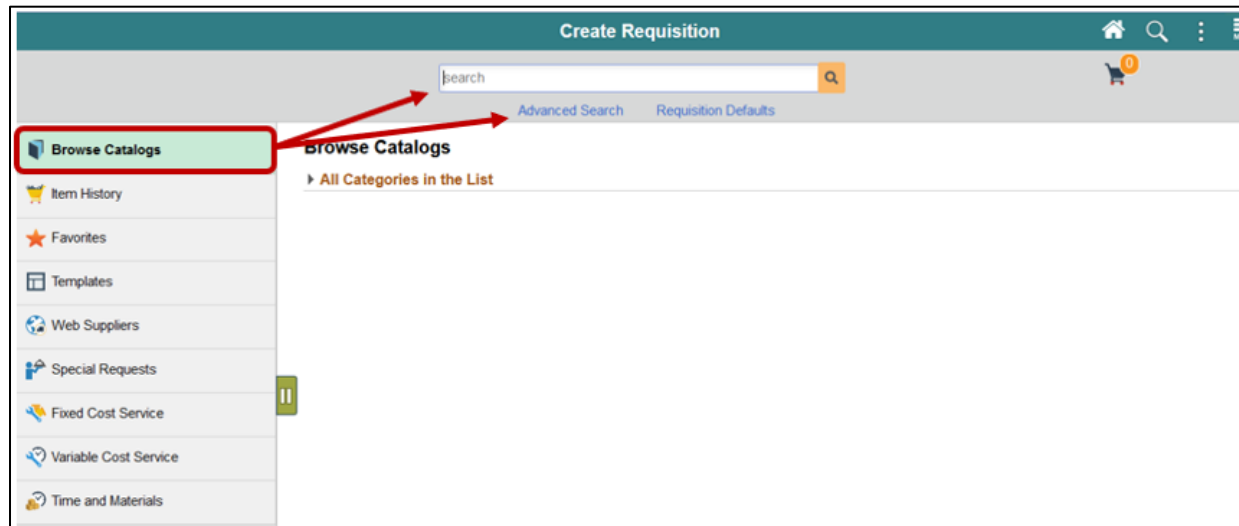


Lecture 2: Create a Requisition

- Navigate to **Finance/Supply Chain (FSCM) tile>Supply Chain Operations tile>eProcurement tile>Create Requisition tile**
- Miami-Dade County (MDC) has adopted the **National Institute of Government Purchasing (NIGP)** standard taxonomy for classifying goods and services. The intent of adopting a universal taxonomy is to improve visibility and conduct an in-depth analysis of spending to inform sourcing strategies and improve buying efficiency.

Lecture 2: Create a Requisition

- **eProcurement Requisition Navigation Page:** The INFORMS eProcurement/Purchasing module provides several ways for sourcing items to a requisition (i.e., Catalog, Favorites, Templates, Web). This lecture will primarily focus on sourcing an item from the master item catalog.



Lecture 2: Create a Requisition

1. Enter the description of the item on the **SEARCH** field located at the top of the page.

The screenshot displays the 'Create Requisition' web application interface. At the top, a search bar contains the word 'Construction', which is highlighted with a red box. A red arrow points from this search bar to the 'Item Category' list on the left. Another red arrow points from the search bar to the first item in the search results. The 'Item Category' list on the left includes various categories such as 'Construction, Sewer and Storm Drain (679)', 'Lamps, Construction Equipment, Portable, Shop and Work Site (400)', 'Construction, Streets, Major and Residential, Including Reco (308)', 'Construction, Water System, Plants, Main and Service Line (151)', 'Construction, Bridge and Drawbridge, Including Reconstruction (143)', 'Construction, Pipe Culvert (135)', 'Construction, General: Backfill Services, Digging, Ditching, (109)', 'Earth Moving Equipment, Graders, Dozers, Loaders, etc. Renta (90)', 'File Folders: Expanding Envelopes, Wallets, etc. (76)', and 'Signs: Construction, Including Roll-Up Type Message Signs (73)'. The search results on the right show a list of items, each with a description, price, and an 'Add to Cart' button. The first item is '24091251306' with a description: 'FLATWARE, STAINLESS STEEL, 18% CHROME CONTENT, 3 DOZ/CTN, "WINDSOR PATTERN", DIMENSION APPROX. STAMPED WITH MFG. STANDARD MARKING, KNIVES, ENTRE, 8-1/2 IN., MIN. WT. PER GROSS 23 LB, PLAIN EDGE, 1 PIECE CONSTRUCTION - 3 DOZ/CTN'. The price is '\$0.0000' and the unit is 'Carton'. The 'Add to Cart' button is highlighted with a red arrow.

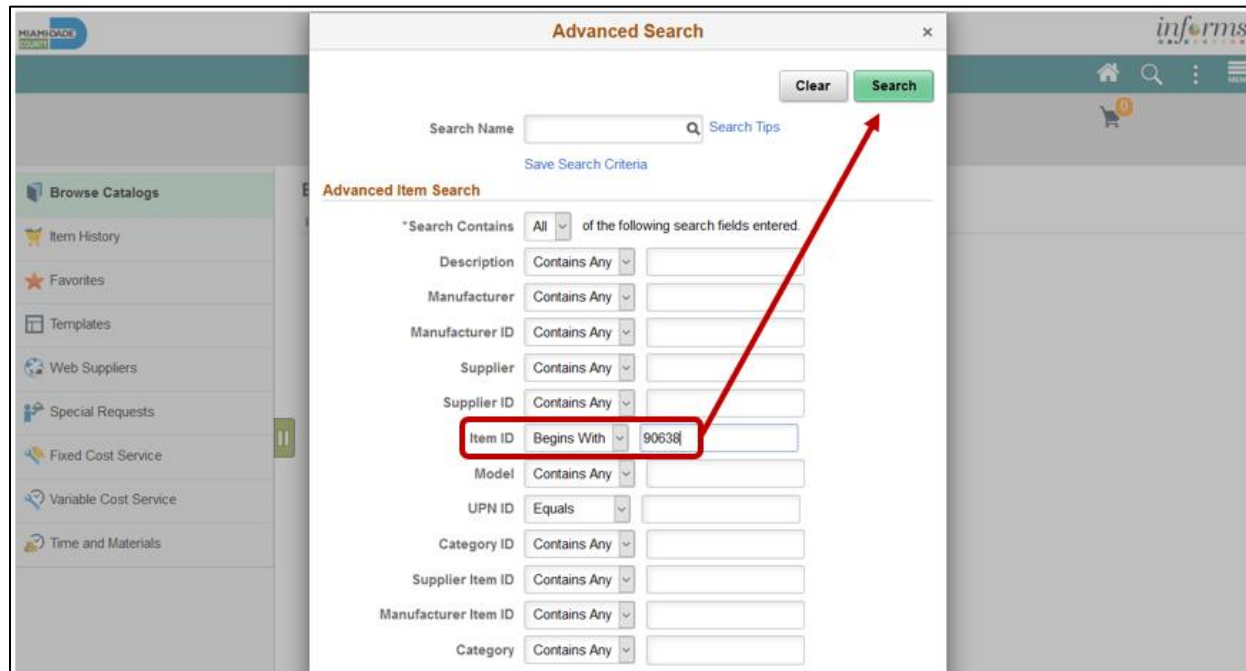
Item ID	Description	Price	Unit	Action
24091251306	FLATWARE, STAINLESS STEEL, 18% CHROME CONTENT, 3 DOZ/CTN, "WINDSOR PATTERN", DIMENSION APPROX. STAMPED WITH MFG. STANDARD MARKING, KNIVES, ENTRE, 8-1/2 IN., MIN. WT. PER GROSS 23 LB, PLAIN EDGE, 1 PIECE CONSTRUCTION - 3 DOZ/CTN	\$0.0000	Carton	Add to Cart
24091251405	FLATWARE, STAINLESS STEEL, 18% CHROME CONTENT, 3 DOZ/CTN, "WINDSOR PATTERN", DIMENSION APPROX. STAMPED WITH MFG. STANDARD MARKING, KNIVES, ENTRE, 8-1/2 IN., MIN. WT. PER GROSS 23 LB, PLAIN EDGE, 1 PIECE CONSTRUCTION - 3 DOZ/CTN	\$0.0000	Carton	Add to Cart
24091251207	FLATWARE, STAINLESS STEEL, 18% CHROME CONTENT, 3 DOZ/CTN, "WINDSOR PATTERN", DIMENSION APPROX. STAMPED WITH MFG. STANDARD MARKING, KNIVES, ENTRE, 8-1/2 IN., MIN. WT. PER GROSS 23 LB., SERRATED EDGE, ONEPIECE CONSTRUCTION - 3 DOZ/CTN	\$0.0000	Carton	Add to Cart
28546207359	LAMPS, MINIATURE, FLASHLIGHT AND HAND LANTERN, 3 "D" CELL, KRYPTON, RAY-O-VAC NO. K3-2 OR EQUAL - 12/CASE	\$0.0000	Case	Add to Cart

Lecture 2: Create a Requisition

2. Select the **ADVANCED SEARCH** link located at the top of the page. The requester will be required to enter at least one value on any of the search criteria listed.
3. It is recommended that the requester enter the 5-digit NIGP item category (formally known as Commodity Code) on the **ITEM ID** field.
4. Select the dropdown
5. Select the **BEGINS WITH** option.

Lecture 2: Create a Requisition

6. Select the **SEARCH** button located on the top left of the page. The system will display items that meet the criteria on the search results page.



The screenshot shows the 'Advanced Search' modal window in the 'informs' system. The window has a 'Clear' button and a green 'Search' button in the top right corner. A red arrow points from the 'Item ID' field to the 'Search' button. The 'Item ID' field is highlighted with a red box and contains the text '90638'. The 'Advanced Item Search' section includes a dropdown menu for 'Search Contains' set to 'All', followed by a list of search fields: Description, Manufacturer, Manufacturer ID, Supplier, Supplier ID, Item ID, Model, UPN ID, Category ID, Supplier Item ID, Manufacturer Item ID, and Category. Each field has a dropdown menu for the search type (e.g., 'Contains Any', 'Equals') and a text input field.

Advanced Search

Clear Search

Search Name Search Tips

Save Search Criteria

Advanced Item Search

*Search Contains All of the following search fields entered.

Description Contains Any

Manufacturer Contains Any

Manufacturer ID Contains Any

Supplier Contains Any

Supplier ID Contains Any

Item ID Begins With

Model Contains Any

UPN ID Equals

Category ID Contains Any

Supplier Item ID Contains Any

Manufacturer Item ID Contains Any

Category Contains Any

Lecture 2: Create a Requisition

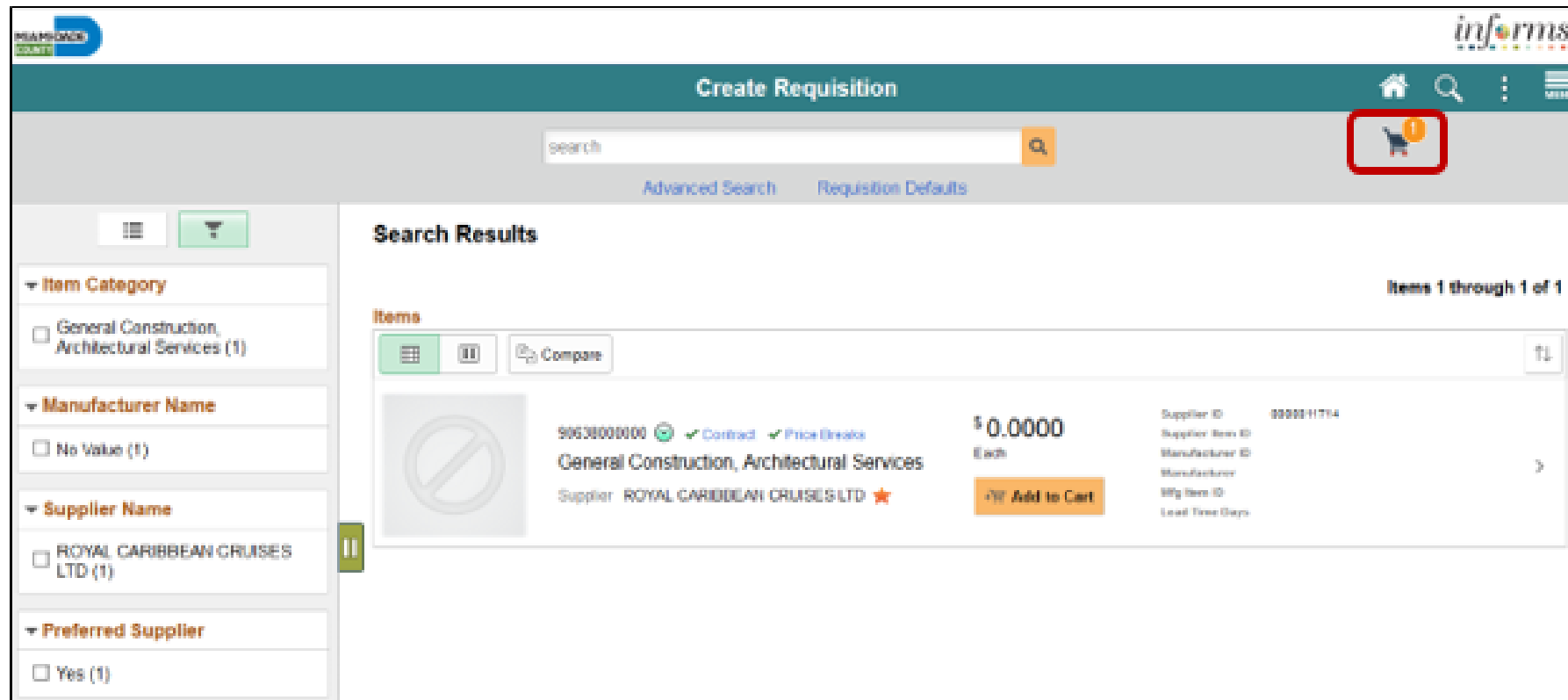
7. Select the **ADD TO CART** button for the desired item. This action will update the **SHOPPING CART**.

The screenshot displays the 'Create Requisition' web application interface. The top navigation bar includes a home icon, a search icon, and a menu icon. Below the navigation bar is a search bar with the text 'search' and a magnifying glass icon. To the right of the search bar is a shopping cart icon with a red circle containing the number '0'. Below the search bar are two tabs: 'Advanced Search' and 'Requisition Defaults'. The main content area is divided into a left sidebar and a right main panel. The left sidebar contains four filter sections: 'Item Category' with a checkbox for 'General Construction, Architectural Services (1)', 'Manufacturer Name' with a checkbox for 'No Value (1)', 'Supplier Name' with a checkbox for 'ROYAL CARIBBEAN CRUISES LTD (1)', and 'Preferred Supplier' with a checkbox for 'Yes (1)'. The right main panel is titled 'Search Results' and shows 'Items 1 through 1 of 1'. It contains a table with one item. The item has a placeholder image, a quantity of '90638000000', a price of '\$0.0000 Each', and a supplier name of 'General Construction, Architectural Services' with 'Supplier ROYAL CARIBBEAN CRUISES LTD' and a star icon. An 'Add to Cart' button is highlighted with a red box. A red arrow points from the 'Add to Cart' button to the shopping cart icon in the top navigation bar. The table also lists various IDs: Supplier ID 0000011714, Supplier Item ID, Manufacturer ID, Manufacturer, Mtg Item ID, and Lead Time Days.

Search Results		Items 1 through 1 of 1	
Items			
	90638000000 General Construction, Architectural Services Supplier ROYAL CARIBBEAN CRUISES LTD ★	\$0.0000 Each	Supplier ID 0000011714 Supplier Item ID Manufacturer ID Manufacturer Mtg Item ID Lead Time Days

Lecture 2: Create a Requisition

8. Select the **SHOPPING CART** button. This action will route to the shopping cart page.



Lecture 2: Create a Requisition

Shopping Cart Page: The shopping cart page enables the requestor to review and update the shopping cart before proceeding to the **CHECKOUT** page.

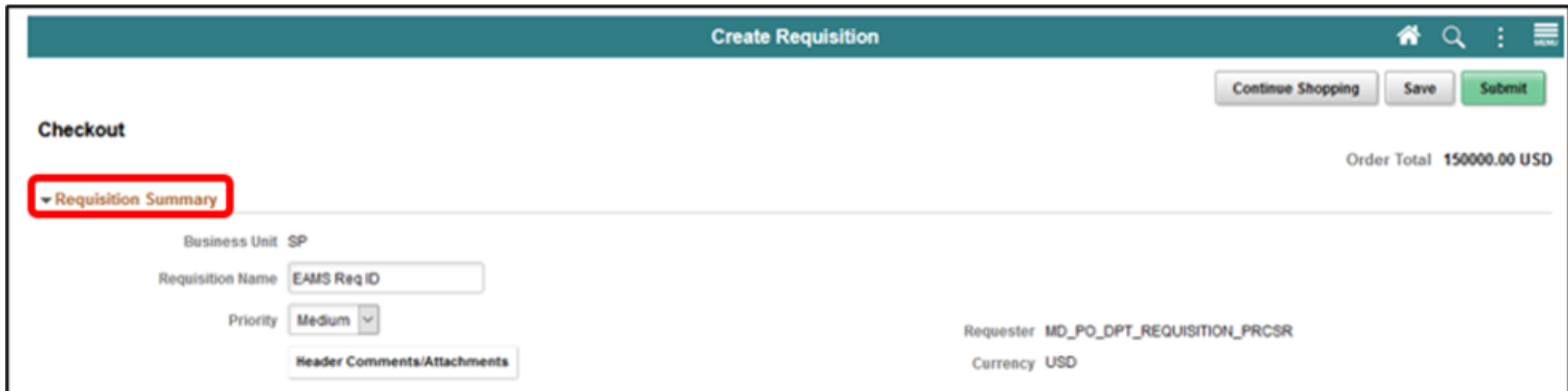
The screenshot displays the 'Create Requisition' interface. At the top, there are navigation icons and three buttons: 'Continue Shopping', 'Update Cart' (highlighted with a red box), and 'Checkout'. Below the buttons, the 'Shopping Cart' section indicates '1 item(s) to buy now.' and a 'Requisition Summary' section. The summary includes fields for Business Unit (SP), Requisition Name (EAMS Req ID), Requester (MD_PO_DPT_REQUISITION_PROCSR), and Currency (USD). A table lists the cart items, showing one row for 'Consulting' with a price of 150000.00 USD, a quantity of 1.0000, and a unit of measure of LE. A 'Delete' button is next to the item. At the bottom, the total is displayed as 150000.00 USD.

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

Total 150000.00 USD

Lecture 2: Create a Requisition

Checkout Page: The checkout page is the last step before submitting the requisition for approval. The **HEADER COMMENTS/ATTACHMENTS** button is available to enter comment text and add attachments.



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

Lecture 2: Create a Requisition

The **HEADER COMMENTS/ATTACHMENTS** button is available to enter comment text and add attachments. The requisitioner should enter any essential information on the **COMMENT TEXT** field relevant to the item's sourcing.



The screenshot displays the 'Requisition Header Comments and Attachments' dialog box. The dialog has a title bar with 'Cancel' and 'Done' buttons. Below the title bar, the word 'Comments' is displayed. There is a large text area for 'Comment Text'. Below this, there are three toggle switches: 'Send to Supplier' (set to 'No'), 'Show at Receipt' (set to 'No'), and 'Show at Voucher' (set to 'No'). At the bottom of the dialog, there is a button labeled 'Add Attachment', which is highlighted with a red rectangle. The background shows a 'Checkout' screen with a 'Requisition Summary' section, including 'Business Unit: SP' and 'Requisition Name: Add Requisition'. The right side of the background shows the 'inform' logo and a 'Submit' button.

Lecture 2: Create a Requisition

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

The screenshot shows the 'Requisition Lines' section of a software interface. At the top, a red box highlights the 'Requisition Lines' tab. Below it, there are four buttons: 'Add to Favorites', 'Add to Template(s)', 'Delete Selected', and 'Mass Change'. A table with the following columns is displayed: 'Line', 'Item Description', 'Quantity', 'Unit of Measure', 'Price', and 'Total'. The table contains one row with the following data: Line 1, Item Description 'Consulting', Quantity 1.0000, Unit of Measure 'Del Ls Item', Price 150000.00 USD, and Total 150000.00 USD. Below the table, there is a 'Justification Comments' section with a text area. At the bottom, there are three buttons: 'Check Budget', 'Pre-Check Budget', and 'Add Request Document'. The 'Budget Check Status' is shown as 'Not OK'd'.

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

Lecture 2: Create a Requisition


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

Cancel

Schedule Detail

Done

Line 1 - General Construction, Architectural Services



Item ID: 90638000000

Price: 0.00 USD

Quantity: 1.0000

Unit of Measure: Each

Item Category: General Construction, Architectural Services

Supplier: ROYAL CARIBBEAN CRUISES LTD

Supplier Item ID

Manufacturer

Manufacturer's Item ID

Lead Time: 0

Attributes

☐ Catalog Item

☒ Contract

☐ Preferred Supplier

Ship To

Schedule	*Ship To	Address	Quantity	Price	Total	Due Date	Attention To
1	SP00000003	1015 N AMERICA WAY MIAMI, FL 33132	1.0000	0.00 USD	0.00 USD	11/06/2020	Thomas Burns

Lecture 2: Create 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. Select the **DONE** button when all the ChartField values have been selected. The system will then return to the Checkout page.

The screenshot shows the 'Distribution' page of a requisition system. At the top, there are 'Cancel' and 'Done' buttons. The page displays the following information:

- Schedule: 1
- Item Description: General Construction, Architectural Services
- Quantity: 1.0000 Each
- Merchandise Amount: USD
- Distribute By: Qty

Below this information is a row of tabs: 'Chartfields1', 'Chartfields2' (highlighted with a red box), 'Details', 'Budget Information', 'Asset Information', and 'Show All'. At the bottom, there is a table with the following columns: 'Distribution Line', 'Status', 'Dist Type', 'Location', 'Quantity', 'Open Qty', 'Percent', 'Merchandise Amount', 'GL Business Unit', and action buttons (+ and -).

Distribution Line	Status	Dist Type	Location	Quantity	Open Qty	Percent	Merchandise Amount	GL Business Unit	
1	Open		3P00000000	1.0000	1.0000	100.0000	0.00	NO-DE	+ -

Lecture 2: Create a Requisition

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

Requester MD_PO_DPT_REQUISITION_PROSR

Currency USD

Requisition Lines

1 row

Add to Favorites Add to Templates Delete (selected) Mass Change

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

Justification Comments

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

Add Request Document

Lecture 2: Create a Requisition

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

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 Lin Item), Item Category (General Construction, Architectural Services), Original Substituted Item, and Long Description. There are also buttons for 'Buyer Information' and 'Show Configuration'.
- Attributes:** Includes a 'Special Request' field.
- Item Additional Information:**
 - Contract Information:** Includes 'Use Contract If Available' (Yes), 'Contract ID', 'Contract Version', 'Contract Line', and 'Category Line'.
 - Supplier Information:** Includes 'Supplier ID', 'Supplier Location', 'Supplier's Catalog Number' (highlighted with a red box and labeled 'EAMS REQ ID'), and 'Item Supplier Priority'.
 - Manufacturer Information:** Includes 'Manufacturer ID', 'Manufacturer's Item ID' (highlighted with a red box and labeled 'EAMS MANUFACTURER ID'), 'UPN Type', and 'UPN ID'.
- Procurement Group Information**
- Sourcing Controls**

Buttons for 'Cancel' and 'Done' are located at the top of the page.

Lecture 2: Create a Requisition

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 EABIS Req ID

Priority Medium

Requester ID_PO_DPT_REQUESTION_PRCR

Currency USD

Reader Comments/Attachments

▼ Requisition Lines

1 new

★ Add to Favorites □ Add to Templates □ Delete Selected □ Mass Change

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

Justification Comments

Check Budget Pre-Check Budget Budget Check Status Not Chkd

Add Request Document

Lecture 2: Create a Requisition

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



The screenshot displays the 'Create Requisition' interface. At the top, there's a teal header bar with the title 'Create Requisition' and navigation icons. Below the header, on the right, are two buttons: 'My Requisitions' and 'Create New Requisition'. The main content area shows the following details:

- Business Unit: SP
- Requisition ID: 000000043
- Requisition Name: EARS Req ID
- Total Amount: 150000.00
- Currency: USD
- Total Lines: 1
- Status: Pending Approval

Below these details, there are two buttons: 'View Approval Chain' and 'View Print', both with right-pointing arrows. The 'View Approval Chain' button is highlighted with a red rectangular border. At the bottom left, there are three status indicators: 'Check Budget' (with a blue icon), 'Pre-Check Budget' (with a green icon), and 'Budget Check Status: Not OK'd'.

Lecture 2: Create a Requisition

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).

The screenshot shows a software interface titled "Approval Flow" with a close button (X) in the top right corner. Below the title bar, the text "MD Requisition Approval" is displayed. A dropdown menu labeled "EAMS Req ID" is set to "Pending". A button labeled "Start New Path" is located below the dropdown. The main area contains a list of approval steps, each with a status icon and a plus button on the right:

- Department ID Approver** (Pending icon) with a plus button.
- [MD_PO_DPT_REQ_APRVR1](#) (link icon) with a right arrow button. Below it is the text "Department Requisition Approv1".
- Not Routed** (document icon) with a plus button.
- [Multiple Approvers](#) (link icon) with a right arrow button. Below it is the text "Requisition Dollar Approver2".
- Not Routed** (document icon) with a plus button.
- [Multiple Approvers](#) (link icon) with a right arrow button. Below it is the text "Requisition Dollar Approver3".

Lecture 1: Activities and Exercises



Lecture 3: Creating a Requisition from Web Suppliers

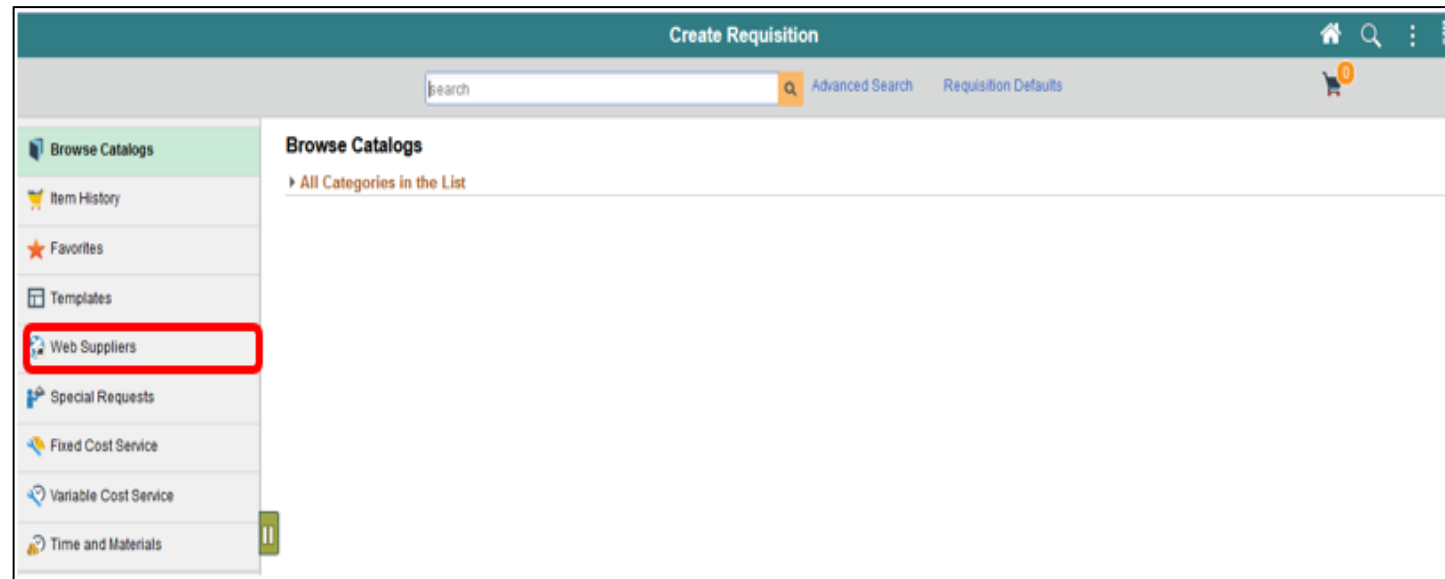
Navigate to ***Finance/Supply Chain (FSCM) tile>Supply Chain Operations tile>eProcurement tile >Create Requisition tile***

Lecture 3: Creating a Requisition from Web Suppliers

What is a web supplier (Punchout)? The ability to access remote catalogs (i.e., Office Depot and Grainger) that are maintained by a supplier rather than Miami-Dade County (MDC). The interaction enables an MDC requisitioner to browse and search the web supplier's online catalog to select items to add back into the INFORMS system requisition.

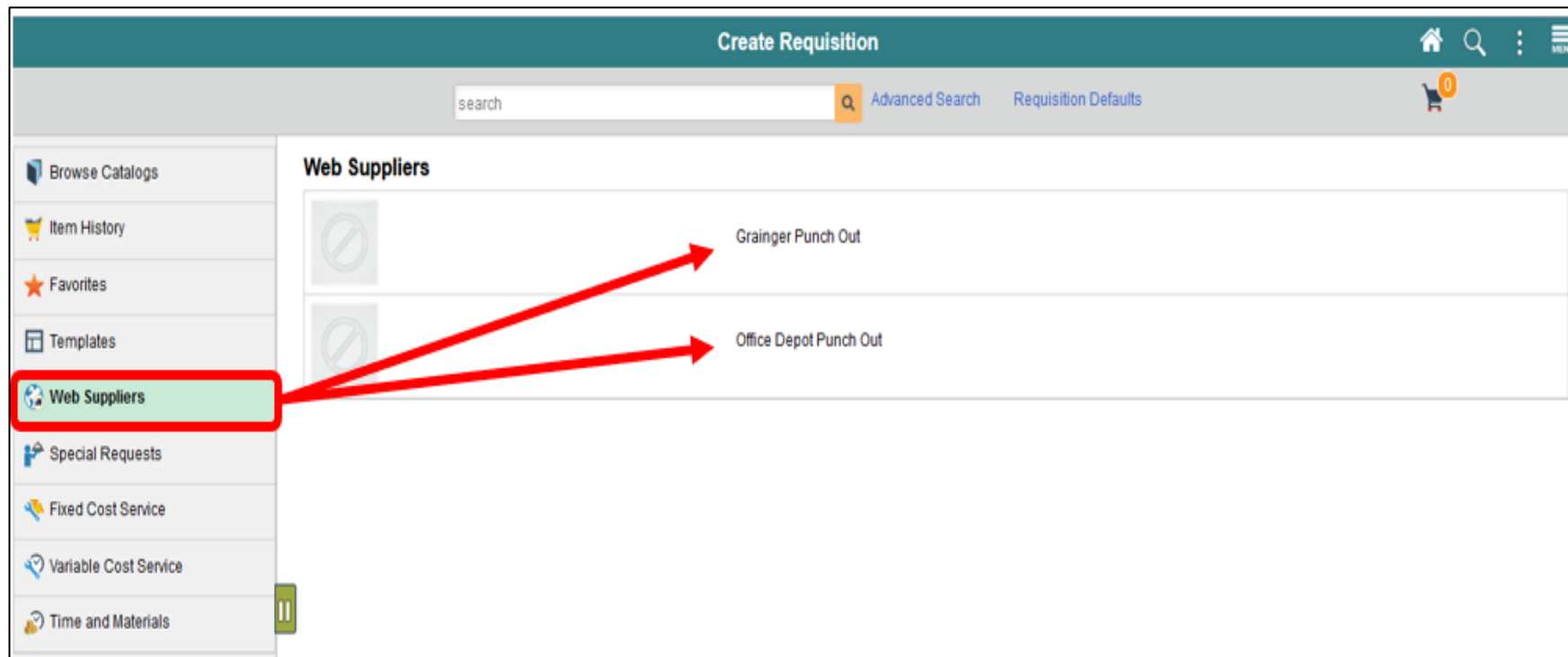
Lecture 3: Creating a Requisition from Web Suppliers

eProcurement Requisition Navigation Page: The INFORMS eProcurement/Purchasing module provides several ways for sourcing items to a requisition (i.e., Catalog, Favorites, Templates, Web). This lecture will primarily focus on sourcing an item from web suppliers. Select the **WEB SUPPLIERS** button to access the Web Supplier page.



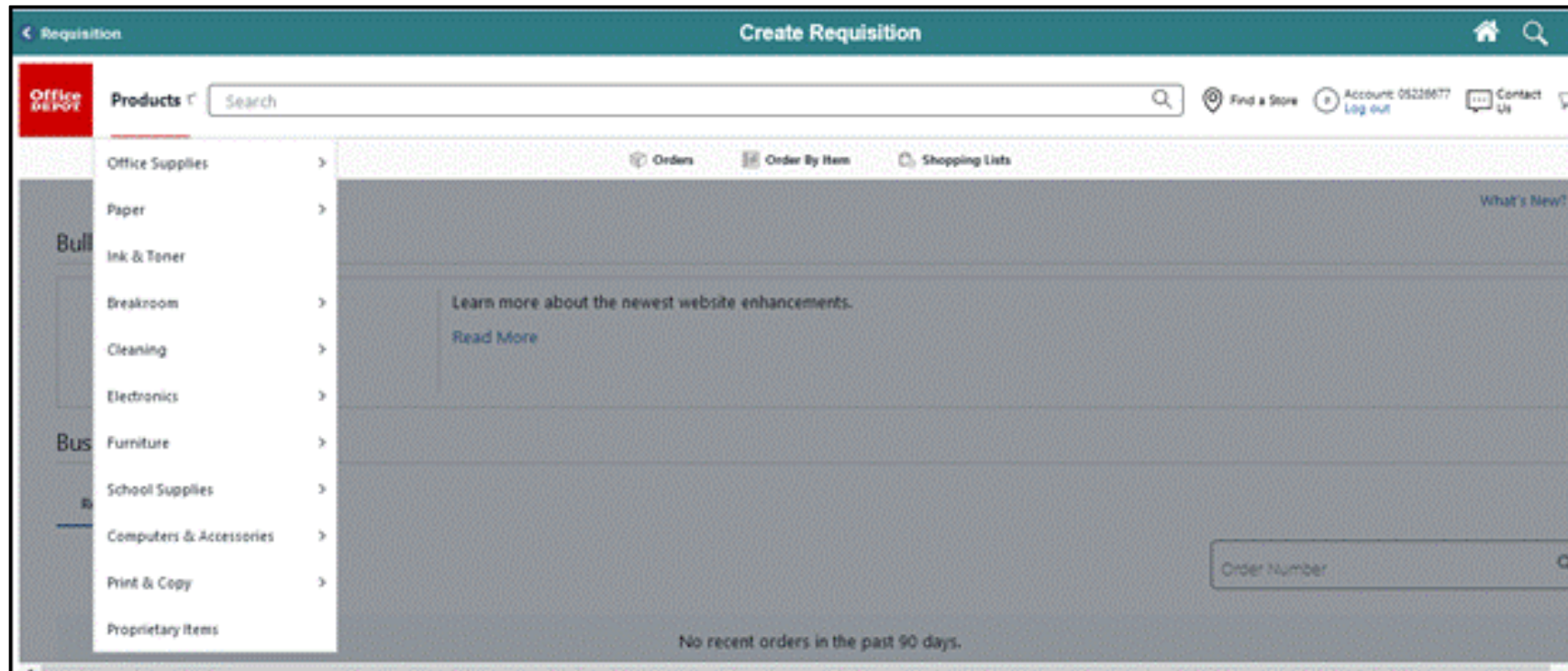
Lecture 3: Creating a Requisition from Web Suppliers

Web Suppliers Page: The web suppliers page displays only those suppliers who have established a direct connection with Miami-Dade County.



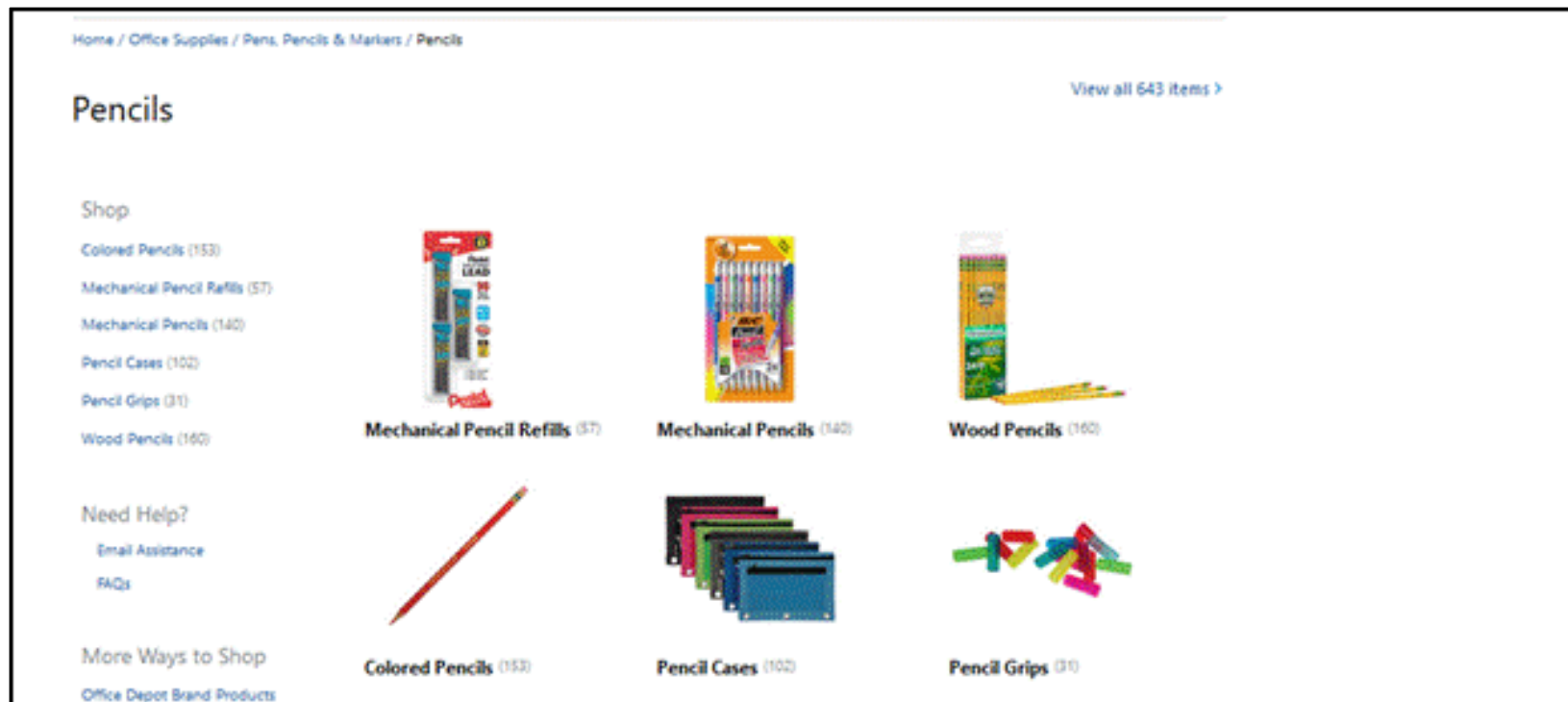
Lecture 3: Creating a Requisition from Web Suppliers

Catalog Page: The catalog page will vary by supplier. However, both will have basic and advance search options. Each option enables the requisitioner to key specific information to route them to the item category or item details.



Lecture 3: Creating a Requisition from Web Suppliers

Select the item category. The system will route the requisitioner to the items details page and display all items that meet the criteria.



Lecture 3: Creating a Requisition from Web Suppliers

Items Detail Page: The items detail page displays the item description, negotiated price, and availability for all items that meet the selected item category (i.e., Wood Pencils). 5. Select the **ITEM icon**. This action will route the requisitioner to the product details page.

☐ Office Depot (15)
See All Brand

Pack Size


☐ 12 (64)
☐ 144 (38)
☐ 72 (15)
☐ 1 (12)
☐ 36 (8)
See All Pack Size

Color (Barrel)

☐ Yellow (62)
☐ Multicolor (25)
☐ Assorted (19)
☐ Black (8)
☐ White (7)
See All Color (Barrel)

Lead Type

☐ #2 (41)
☐ HB (31)




Item 747195

Ticonderoga® Woodcase Pencils,
#2 Lead, Soft, Pack of 96

Availability: 22
✓ Sold Online

Qty

\$32⁸⁴ / pack
Add to Cart
☐ Compare



Item 760452

Ticonderoga® Pencils , Pre-
Sharpened, #2 Soft Lead, Yellow
Barrel, Box Of 30

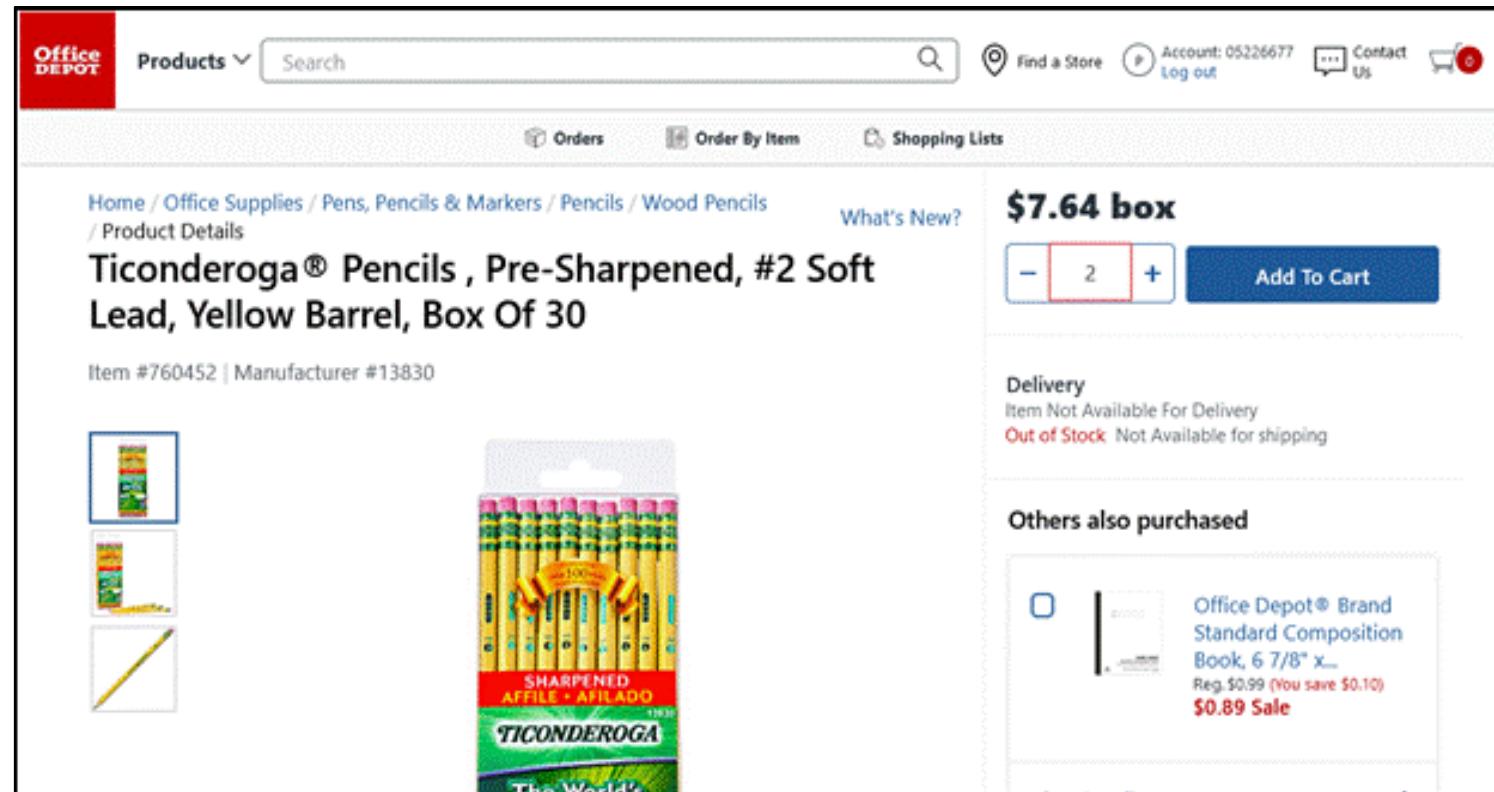
Availability: 518
✓ Sold Online
[Safety Data Sheets](#)

Qty

\$7⁶⁴ / box
Add to Cart
☐ Compare

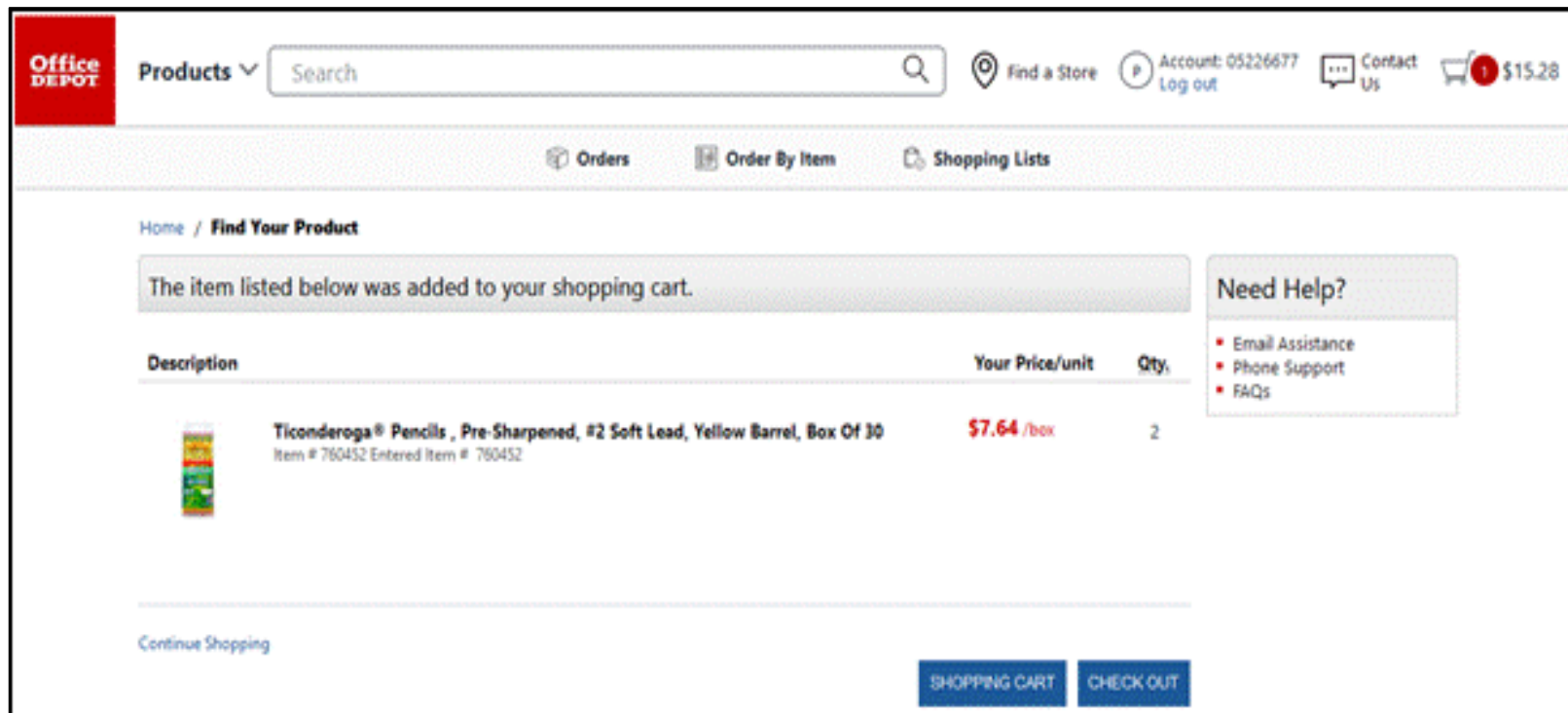
Lecture 3: Creating a Requisition from Web Suppliers

Product Details Page: The product details page provides item attributes such as the product description and specifications. The page also provides details related to availability and price.



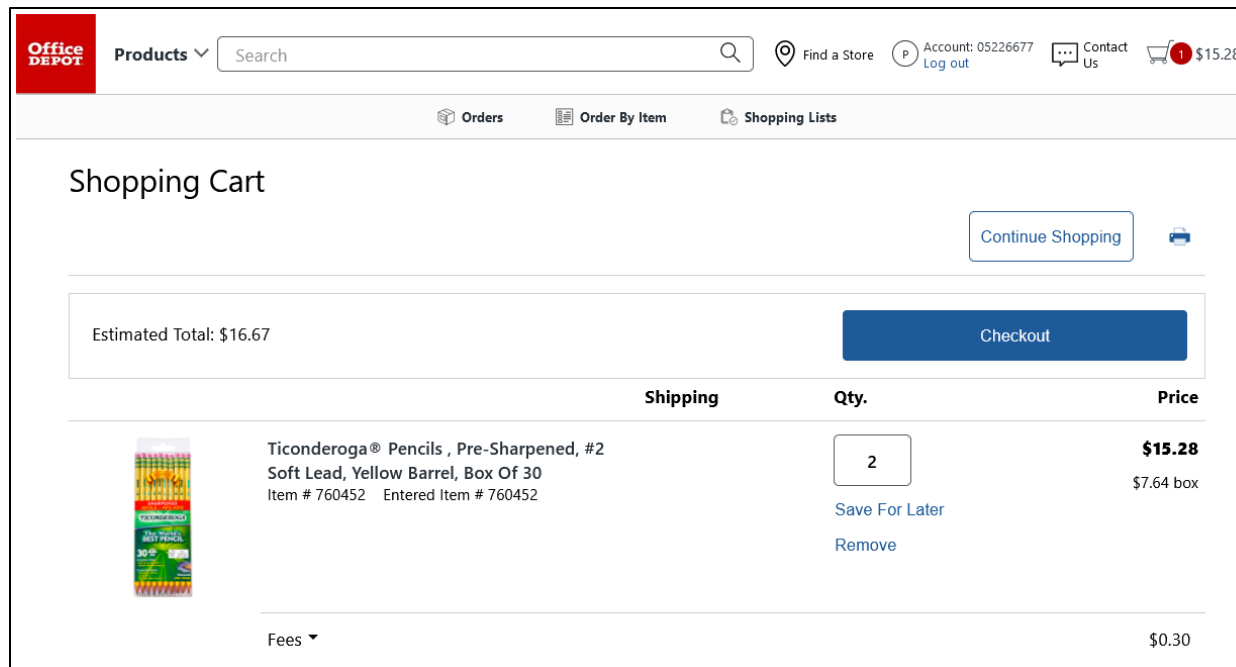
Lecture 3: Creating a Requisition from Web Suppliers

Shopping Cart Review Page: The shopping cart review page will provide a summary of the item that was selected. The requisitioner will see a brief description of the item, unit price, and quantity.




Lecture 3: Creating a Requisition from Web Suppliers

Shopping Cart Page: The shopping cart page is the final step before the checkout. On this page, a requisitioner will see the estimated total, item details, quantities per item, unit price, and any additional fees that are applicable. Also, there are options to remove an item or continue shopping. Select the **CHECKOUT** button.



The screenshot shows the Office Depot Shopping Cart page. At the top, there's a navigation bar with the Office Depot logo, a search bar, and links for 'Find a Store', 'Account: 05226677 Log out', 'Contact Us', and a shopping cart icon showing 1 item for \$15.28. Below the navigation bar, there are tabs for 'Orders', 'Order By Item', and 'Shopping Lists'. The main heading is 'Shopping Cart'. On the right, there's a 'Continue Shopping' button. Below that, a box displays the 'Estimated Total: \$16.67' and a large blue 'Checkout' button. The cart items are listed in a table with columns for 'Shipping', 'Qty.', and 'Price'. One item is shown: 'Ticonderoga® Pencils , Pre-Sharpended, #2 Soft Lead, Yellow Barrel, Box Of 30' with item # 760452 and entered item # 760452. The quantity is 2, and the price is \$15.28 (\$7.64 box). There are links for 'Save For Later' and 'Remove'. At the bottom, there's a 'Fees' section showing \$0.30.

Shipping	Qty.	Price
 Ticonderoga® Pencils , Pre-Sharpended, #2 Soft Lead, Yellow Barrel, Box Of 30 Item # 760452 Entered Item # 760452	2 Save For Later Remove	\$15.28 \$7.64 box
Fees		\$0.30

Lecture 3: Creating a Requisition from Web Suppliers

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

Create Requisition

Continue Shopping Save Submit

Checkout

Order Total 15.28 USD

▼ Requisition Summary

Business Unit PR

Requisition Name EAMS REQ ID

Priority Medium

Header Comments/Attachments

Requester BURNST

Currency USD

Lecture 3: Creating a Requisition from Web Suppliers

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

Create Requisition

Continue Shopping Save **Submit**

Checkout Order Total 15.28 USD

Requisition Summary

Business Unit PR
Requisition Name EAMS REQ ID
Priority Medium
Header Comments/Attachments
Requester BURNST
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	Ticonderoga(R) Pencils , Pre-Sharpended, #2 Soft Lead, Yellow Barrel, Box Of 30	2.0000		7.64 USD	15.28 USD

Justification Comments

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

Add Request Document

Lecture 3: Creating a Requisition from Web Suppliers

Save Confirmation Page: The Save confirmation page is intended to enable the requisitioner to view a summary of the final requisition. Also, it provides access to preview the approval workflow and to print the requisition. Select the **VIEW APPROVAL CHAIN** button to view the list of approvers for the requisition

Create Requisition

My Requisitions Create New Requisition

Business Unit: BP
Requisition ID: 000000043
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 OK'd

Lecture 1: Activities and Exercises



Lecture 4: Creating a Special Request

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

Lecture 4: Creating a Special Request

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

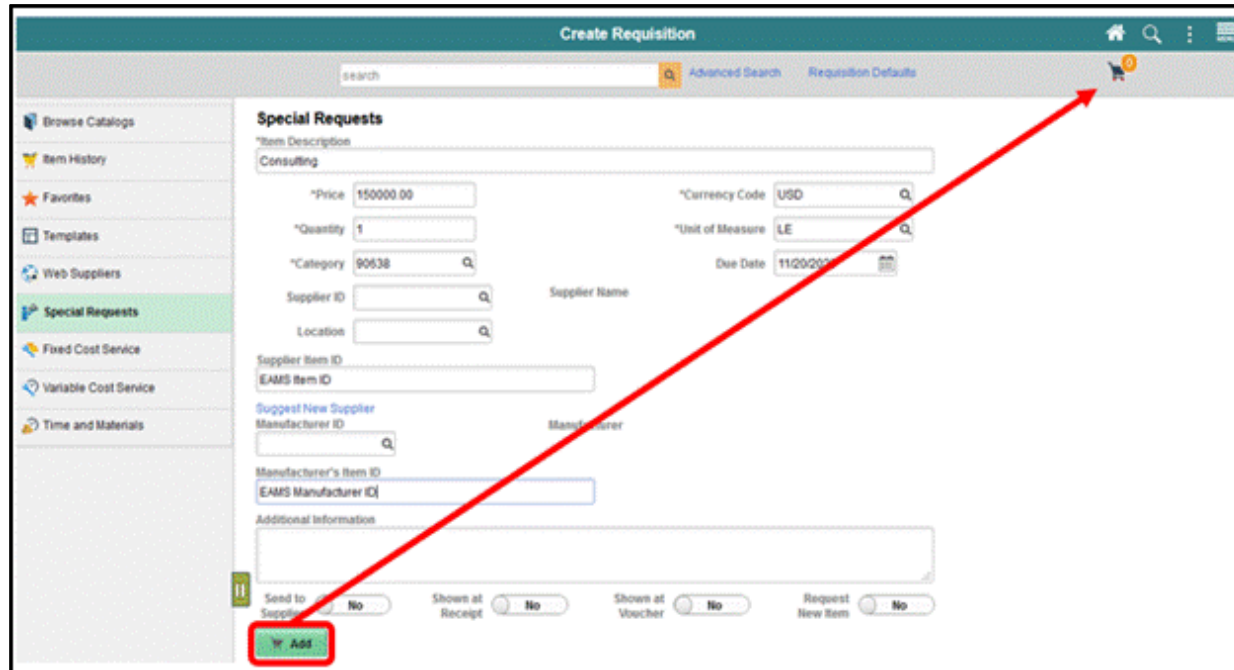
The screenshot displays the 'Create Requisition' interface, specifically the 'Special Requests' tab. The left sidebar contains a navigation menu with options: 'Browse Catalogs', 'Item History', 'Favorites', 'Templates', 'Web Suppliers', 'Special Requests' (highlighted), 'Fixed Cost Service', 'Variable Cost Service', and 'Time and Materials'. The main form area is titled 'Special Requests' and includes the following fields 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.
- *Currency Code**: A dropdown menu with 'USD' selected and a search icon.
- *Unit of Measure**: A dropdown menu with a search icon.
- Supplier ID**: A text input field with a search icon.
- Supplier Name**: A text input field.
- Location**: A text input field with a search icon.
- Supplier Item ID**: A text input field.
- Suggest New Supplier**: A blue link.
- Manufacturer ID**: A text input field with a search icon.
- Manufacturer**: A text input field.
- 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 with a shopping cart icon.

The top of the form has a search bar and links for 'Advanced Search' and 'Requisition Defaults'. The bottom right corner of the slide features the Miami-Dade County logo.

Lecture 4: Creating a Special Request

Select the **ADD** button. Once the requisitioner has selected and entered all the required fields, update the shopping cart with the special request item details and display a count on the shopping cart icon. Select the **SHOPPING CART** button to confirm all line items, quantities, and costs are correct.



The screenshot displays the 'Create Requisition' interface. On the left is a sidebar with navigation options: Browse Catalogs, Item History, Favorites, Templates, Web Suppliers, Special Requests (highlighted), Fixed Cost Service, Variable Cost Service, and Time and Materials. The main area is titled 'Special Requests' and contains several input 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, Supplier Name, Location, Supplier Item ID, EAMS Item ID, Suggest New Supplier, Manufacturer ID, Manufacturer's Item ID, and EAMS Manufacturer ID. At the bottom, there are checkboxes for 'Send to Supplier', 'Shown at Receipt', 'Shown at Voucher', and 'Request New Item', all currently set to 'No'. A green 'Add' button is located at the bottom left of the form. A red arrow originates from this 'Add' button and points diagonally upwards to the shopping cart icon in the top right corner of the page header.

Lecture 4: Creating a Special Request

HEADER COMMENTS/ATTACHMENTS: 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.

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	<input type="radio"/> No

Lecture 4: Creating a Special Request

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

Cancel Distribution

Schedule 1
Item Description Consulting
Quantity 1.0000 Del Ln Item
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				

Lecture 4: Creating a Special Request

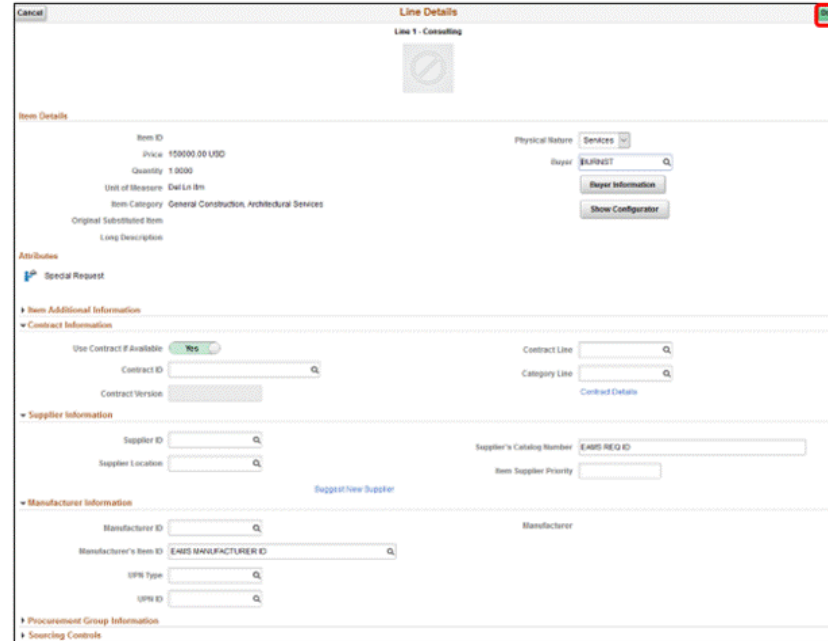
The following instruction is for departments (i.e., Transit) who leverage the EAMS and INFORMS integration. Select the **LINE DETAILS** button located on the Requisition Lines section.

The screenshot displays the 'Create Requisition' web application interface. At the top, there is a header bar with the title 'Create Requisition' and navigation icons. Below the header, there are three buttons: 'Continue Shopping', 'Save', and 'Submit'. The main content area is divided into several sections:

- Checkout**: Located at the top left of the main content area.
- Order Total**: Displayed as '150000.00 USD' on the right side.
- Requisition Summary**: A section containing fields for 'Business Unit' (SP), 'Requisition Name' (EAMS Req ID), 'Priority' (Medium), 'Requester' (MD_PO_DPT_REQUISITION_PRCOR), and 'Currency' (USD). There is also a 'Reader Comments/Attachments' button.
- Requisition Lines**: A section containing a table with one row. The table has columns for 'Line', 'Item Description', 'Quantity', 'Unit of Measure', 'Price', and 'Total'. The row shows '1' for Line, 'Consulting' for Item Description, '1.0000' for Quantity, 'Del Ln Itm' for Unit of Measure, '150000.00 USD' for Price, and '150000.00 USD' for Total. There are also buttons for 'Add to Favorites', 'Add to Template(s)', 'Delete Selected', and 'Mass Change'.
- Justification Comments**: A section with a text area for comments.
- Footer**: Contains links for 'Check Budget', 'Pre-Check Budget', 'Budget Check Status' (Not Chk'd), and 'Add Request Document'.

Lecture 4: Creating a Special Request

The **Line Details Page** is used to verify and edit additional details for a line. As mentioned previously, there are several fields that I will highlight, which are vital for the EAMS and INFORMS integration. Select the **DONE** button when updates and relevant fields are verified.



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 (\$10000.00 USD), Quantity (1.0000), Unit of Measure (EAL4 Bm), Item Category (General Construction, Architectural Services), Original Substituted Item, and Long Description. It also features a 'Physical Return' dropdown set to 'Services', a 'Buyer' field with 'BUYER123' and a search icon, and buttons for 'Buyer Information' and 'Show Configurator'.
- Attributes:** Contains a 'Special Request' icon and label.
- Item Additional Information:**
 - Contract Information:** Includes 'Use Contract if Available' (set to 'Yes'), 'Contract ID' with a search icon, 'Contract Version', 'Contract Line' with a search icon, and 'Category Line' with a search icon and a 'Contract Details' link.
 - Supplier Information:** Includes 'Supplier ID' with a search icon, 'Supplier Location' with a search icon, 'Supplier's Catalog Number' (EAMS REQ ID), and 'Item Supplier Priority'.
 - Manufacturer Information:** Includes 'Manufacturer ID' with a search icon, 'Manufacturer's Item ID' (EAMS MANUFACTURER ID) with a search icon, 'UPN Type' with a search icon, and 'UPN ID' with a search icon.
- Procurement Group Information:** A section header.
- Sourcing Controls:** A section header.

A 'Cancel' button is in the top left, and a 'Done' button is in the top right corner of the window.

Lecture 4: Creating a Special Request

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

The screenshot displays the 'Create Requisition' web application interface. At the top, a teal header bar contains the title 'Create Requisition' and navigation icons. Below the header, a 'Checkout' section is visible, featuring buttons for 'Continue Shopping', 'Save', and 'Submit'. The 'Order Total' is displayed as '150000.00 USD'. The 'Requisition Summary' section includes fields for 'Business Unit' (SP), 'Requisition Name' (EAMS Req ID), 'Priority' (Medium), 'Requester' (MD_PO_DPT_REQUISITION_PRCR), and 'Currency' (USD). A 'Reader Comments/Attachments' button is also present. The 'Requisition Lines' section shows a table with one line item: 'Consulting' with a quantity of 1.0000, unit of measure 'Del Ls itm', price of 150000.00 USD, and total of 150000.00 USD. Below the table, there is a 'Justification Comments' text area. At the bottom, a 'Budget Check Status' is shown as 'Not Chkd', and an 'Add Request Document' button is located.

Create Requisition

Continue Shopping Save Submit

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

Reader Comments/Attachments

▼ 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 Ls itm	150000.00 USD	150000.00 USD

Justification Comments

Check Budget Pre-Check Budget Budget Check Status Not Chkd

Add Request Document

Lecture 1: Activities and Exercises



Lesson 1: Lesson Summary

Having completed the Create a Requisition lesson, users should be able to:

- Select an Item
- Create a Requisition from the Master Item Catalog
- Create a Requisition from Web Suppliers
- Create a Special Request

Module 3: Managing a Requisition

Module Topics

Module Introduction

Lesson 1: Manage a Requisition

- Lecture 1: Copy a Requisition
- Lecture 2: Edit a Requisition
- Lecture 3: View and Print a Requisition
- Lecture 4: Cancel a Requisition

- Lesson 2: Approving a Requisition

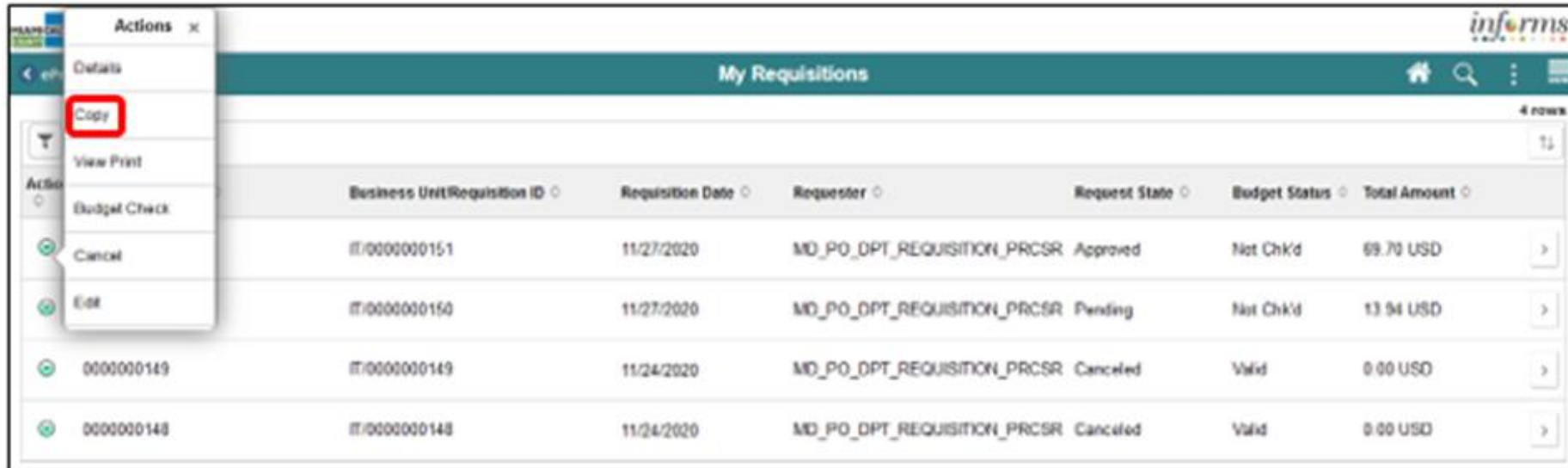
- Lecture 1: Approve a Requisition
- Lecture 2: Deny a Requisition
- Lecture 3: Pushback a Requisition
- Lecture 4: Hold a Requisition

Lecture 1: Copy a Requisition

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

Lecture 1: Copy a Requisition

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



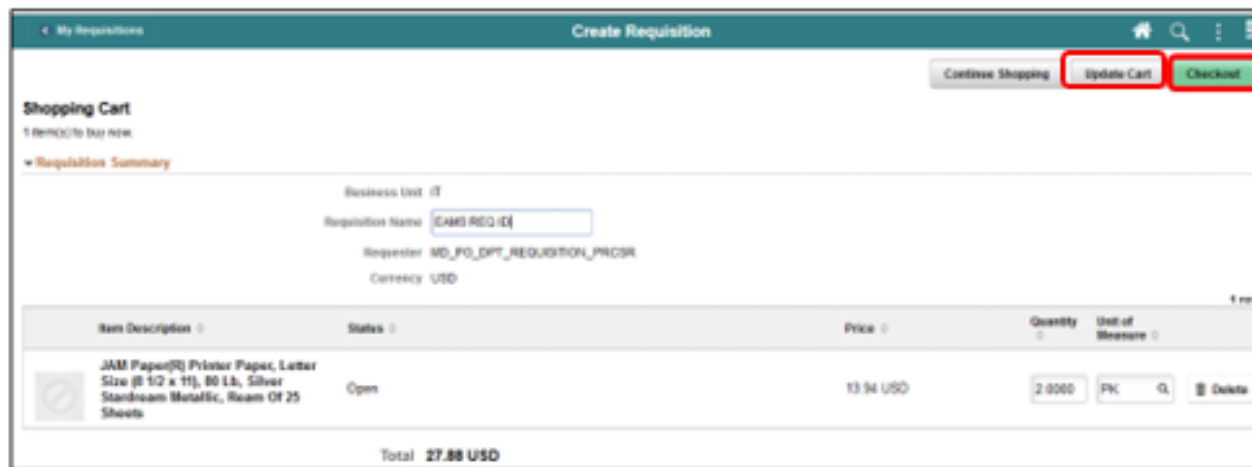
	Business Unit	Requisition ID	Requisition Date	Requester	Request State	Budget Status	Total Amount
	IT/0000000151		11/27/2020	MD_PO_DPT_REQUISITION_PRCR	Approved	Not Chk'd	69.70 USD
	IT/0000000150		11/27/2020	MD_PO_DPT_REQUISITION_PRCR	Pending	Not Chk'd	13.94 USD
0000000149	IT/0000000149		11/24/2020	MD_PO_DPT_REQUISITION_PRCR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

Lecture 1: Copy a Requisition

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

Lecture 1: Copy a Requisition

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.



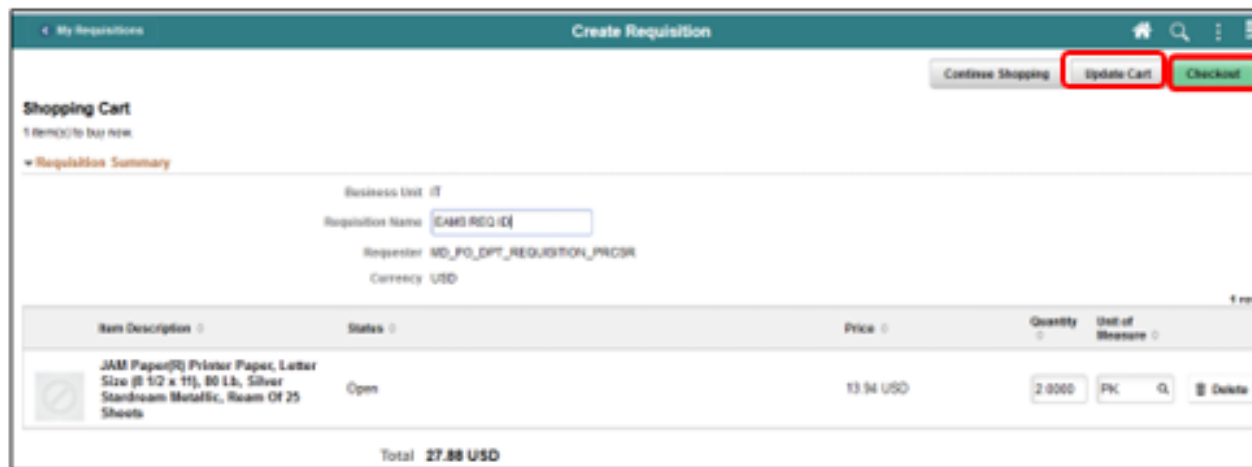
The screenshot displays the 'Create Requisition' interface. At the top right, there are three buttons: 'Continue Shopping', 'Update Cart' (highlighted with a red box), and 'Checkout' (highlighted with a red box). Below these buttons is a 'Shopping Cart' section with a sub-header '1 item(s) to buy now.' and a 'Requisition Summary' link. The summary shows the Business Unit as 'IT', Requisition Name as 'EAMS REQ ID', Requester as 'MD_FO_DPT_REQUISITION_PROGR', and Currency as 'USD'. Below this is a table with one item:

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

At the bottom, the total is displayed as 'Total 27.88 USD'.

Lecture 1: Copy a Requisition

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.



The screenshot displays the 'Create Requisition' interface. At the top right, there are three buttons: 'Continue Shopping', 'Update Cart' (highlighted with a red box), and 'Checkout' (highlighted with a red box). Below these buttons is a 'Shopping Cart' section with a sub-header '1 item(s) to buy now.' and a 'Requisition Summary' link. The summary shows the Business Unit as 'IT', Requisition Name as 'EAMS REQ ID', Requester as 'MD_FO_DPT_REQUISITION_PROGR', and Currency as 'USD'. Below this is a table with one item:

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

At the bottom, the total is displayed as 'Total 27.88 USD'.

Lecture 1: Activities and Exercises

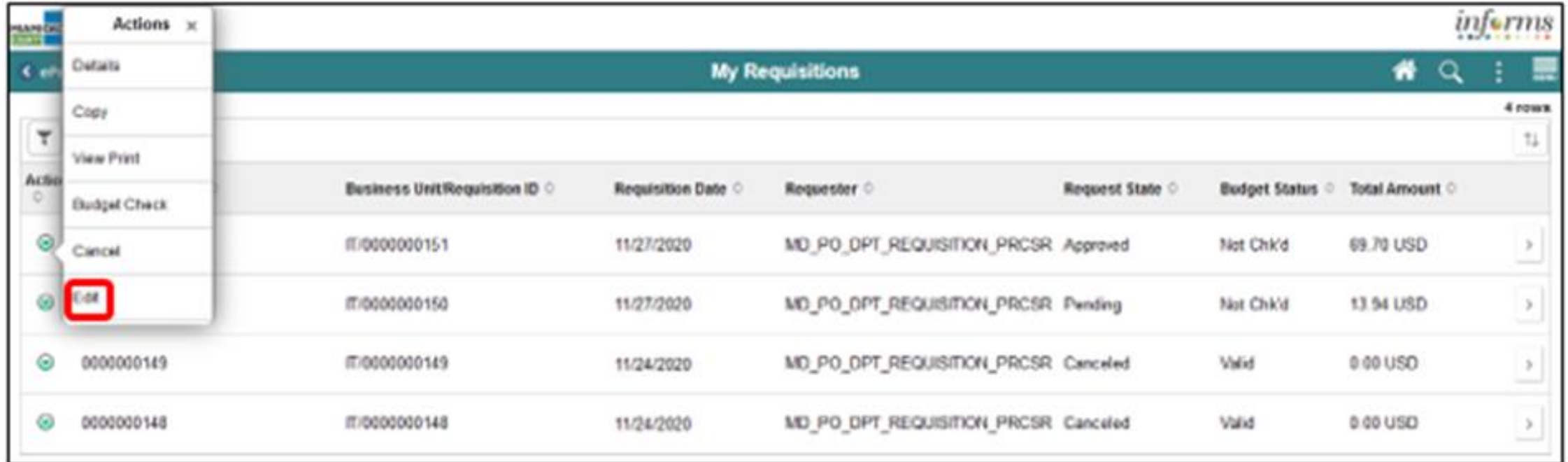


Lecture 2: Edit a Requisition

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

Lecture 2: Edit a Requisition

Select the **RELATED ACTION** icon followed by the **EDIT** option.



The screenshot shows the 'My Requisitions' interface in the 'informs' system. A table lists requisitions with columns for Business Unit, Requisition ID, Requisition Date, Requester, Request State, Budget Status, and Total Amount. An 'Actions' dropdown menu is open for the first row, showing options: Details, Copy, View Print, Budget Check, Cancel, and Edit. The 'Edit' option is highlighted with a red square.

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

Lecture 2: Edit a Requisition

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.

The screenshot displays the 'Edit Requisition' interface. At the top, there's a navigation bar with 'My Requisitions' and 'Edit Requisition'. Below this, a 'Shopping Cart for Requisition ID 0000000151' is shown with 1 item. A 'Requisition Summary' section provides details: Business Unit: IT, Requisition Name: EAMS REQ ID, Requester: MD_PO_DPT_REQUISITION_PRCOR, and Currency: USD. A table lists the items, showing 'JAM Paper® Printer Paper, Letter Size (8 1/2 x 11), 80 Lb, Silver Stardream Metallic, Ream Of 25 Sheets' with a status of 'Approved', a price of '13.94 USD', and a quantity of '2.0000'. The unit of measure is 'PK'. A 'Delete' button is next to the item. At the bottom, the total is '27.88 USD'. In the top right corner, there are three buttons: 'Continue Shopping', 'Update Cart', and 'Checkout', with the 'Checkout' button highlighted by a red rectangle.

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

Total: 27.88 USD

Lecture 2: Edit a Requisition

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.

The screenshot displays the 'Edit Requisition' interface. At the top, there are three buttons: 'Continue Shopping', 'Update Cart', and 'Checkout'. The 'Checkout' button is highlighted with a red rectangular box. Below the buttons, the page title is 'Shopping Cart for Requisition ID 0000000151'. Underneath, it says '1 item(s) to buy now'. A section titled 'Requisition Summary' contains the following details: Business Unit: IT, Requisition Name: EAMS REQ ID, Requester: MD_PO_DPT_REQUISITION_PROSR, and Currency: USD. Below this is a table with the following columns: Item Description, Status, Price, Quantity, and Unit of Measure. The table contains one item: 'JAM Paper® Printer Paper, Letter Size (8 1/2 x 11), 20 Lb., Silver Starstream Metallic, Ream Of 25 Sheets'. The status is 'Approved', the price is '13.94 USD', and the quantity is '2,000'. To the right of the quantity are buttons for 'PK', 'Q', and 'Delete'. At the bottom of the table, the total is displayed as 'Total 27.88 USD'.

Item Description	Status	Price	Quantity	Unit of Measure
JAM Paper® Printer Paper, Letter Size (8 1/2 x 11), 20 Lb., Silver Starstream Metallic, Ream Of 25 Sheets	Approved	13.94 USD	2,000	PK

Total 27.88 USD

Lecture 2: Edit a Requisition

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

The screenshot shows the 'Edit Requisition' interface. At the top right, there are three buttons: 'Continue Shopping', 'Save', and 'Submit'. The 'Submit' button is highlighted with a red rectangular box. Below the buttons, the text 'Checkout for Requisition ID 0000000151' is displayed, along with the 'Order Total 27.88 USD'. The 'Requisition Summary' section includes fields for 'Business Unit' (IT), 'Requisition Name' (EAMS REQ ID), 'Priority' (Medium), and 'Requester' (MD_PO_DPT_REQUISITION_PRCR). There is also a 'Header Comments/Attachments' field. The 'Requisition Lines' section shows a table with one row. The table has columns for Line, Item Description, Status, Quantity, Unit of Measure, Price, and Total. The row contains the following data: Line 1, Item Description 'JAM Paper® Printer Paper, Letter Size (8 1/2 x 11), 80 Lb, Silver Stardream Metallic, Ream Of 25 Sheets', Status 'Approved', Quantity '2.0000', Unit of Measure 'Cello Pack', Price '13.94 USD', and Total '27.88 USD'. Below the table, there is a 'Justification Comments' section with a text area. At the bottom, there are links for 'Check Budget', 'Pre-Check Budget', and 'Add Request Document'. The 'Budget Check Status' is 'Not Child'.

1 row

Line	Item Description	Status	Quantity	Unit of Measure	Price	Total
1	JAM Paper® Printer Paper, Letter Size (8 1/2 x 11), 80 Lb, Silver Stardream Metallic, Ream Of 25 Sheets	Approved	2.0000	Cello Pack	13.94 USD	27.88 USD

Justification Comments

Check Budget Pre-Check Budget Budget Check Status: Not Child

Add Request Document

Lecture 2: Edit a Requisition

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

The screenshot displays the 'Edit Requisition' page. The header includes a breadcrumb 'My Requisitions' and the title 'Edit Requisition'. On the right, there are buttons for 'My Requisitions' and 'Create New Requisition'. The main content area shows the following details:

- Business Unit: IT
- Requisition ID: 0000000151
- Requisition Name: EAMS REQ ID
- Total Amount: 27.88
- Currency: USD
- Total Lines: 1
- Status: Approved

Below the details, there are two buttons: 'View Approval Chain' and 'View Print'. At the bottom of the page, there are three links: 'Check Budget', 'Pre-Check Budget', and 'Budget Check Status: Not Chkd'.

Lecture 1: Activities and Exercises

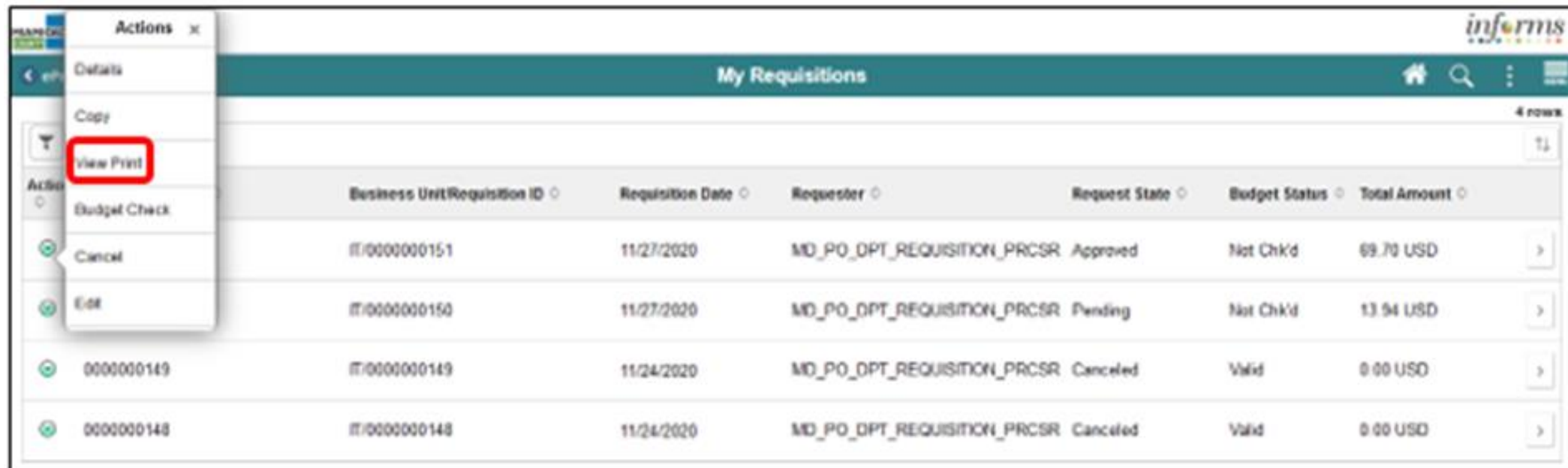


Lecture 3: Edit a Requisition

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

Lecture 3: Edit a Requisition

Select the **RELATED ACTION** icon followed by the **EDIT** option.

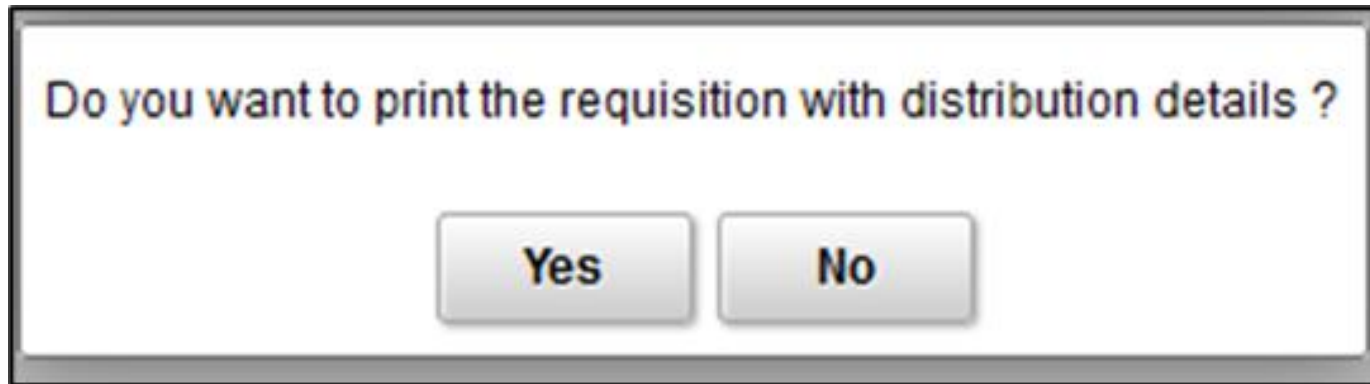


The screenshot shows a web application interface for 'My Requisitions'. On the left, an 'Actions' dropdown menu is open, with 'View Print' highlighted by a red rectangle. The main area displays a table of requisitions with the following columns: Business Unit, Requisition ID, Requisition Date, Requester, Request State, Budget Status, and Total Amount. There are 4 rows of data.

Business Unit	Requisition ID	Requisition Date	Requester	Request State	Budget Status	Total Amount
IT/0000000151	IT/0000000151	11/27/2020	MD_PO_DPT_REQUISITION_PRC	Approved	Not Chk'd	69.70 USD
IT/0000000150	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

Lecture 3: Edit a Requisition

Select the **YES** button. The system will route the requisition processor to the printable page and include the ChartFields on the requisition.



Lecture 3: Edit a Requisition

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: ID000000003		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			
Dist	Status	Location	Qty	PCT	Amount	GL Unit	Account
1	Open	ID000000003	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	

Lecture 1: Activities and Exercises



Lecture 4: Cancel a Requisition

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

Lecture 3: Edit a Requisition

Select the **RELATED ACTION** icon followed by the **DETAILS** option.



The screenshot displays the 'My Requisitions' page in the 'informs' system. An 'Actions' dropdown menu is open, showing options: Details (highlighted with a red rectangle), Copy, View Print, Budget Check, and Edit. The table below lists two requisitions.

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

Lecture 4: Cancel a Requisition

- 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.
- In this lecture, we will cover the cancelation of the entire requisition.

Lecture 4: Cancel a Requisition

Select the **CANCEL REQUISITION** button. The system will display the confirmation prompt.

Line Details

Cancel Requisition

Requisition Summary

Requisition Name	0000000149	Requester	MD_PO_DPT_REQUISITION_PRCR
Business Unit	IT	Entered By	MD_PO_DPT_REQUISITION_PRCR
Requisition ID	0000000149	Total Amount	13.94 USD
Requisition Date	11/24/2020	Request State	Open

Requisition Lifecycle

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

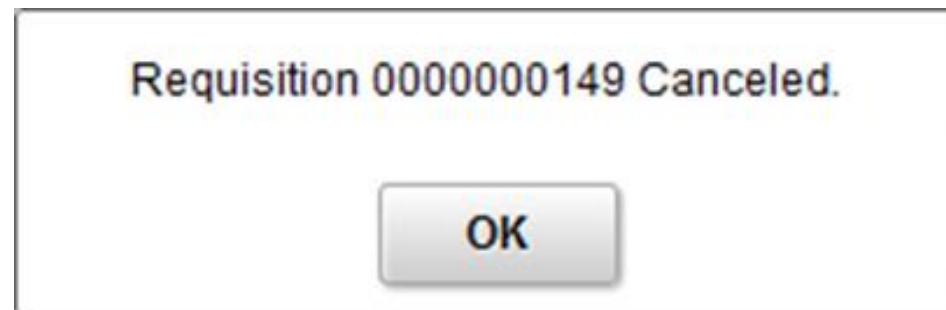
Lines

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), 80 Lb, Silver Starstream Metallic, Ream Of 25 Sheets	ID00000003		Open	1.0000	Cello Pack	13.94	13.94 USD

Cancel Line >

Lecture 4: Cancel a Requisition

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



Lecture 4: Cancel a Requisition

Confirm that the **REQUEST STATE** field reflects “CANCELED.”

The screenshot displays the 'Line Details' window for a requisition. The 'Requisition Summary' section includes the following information:

- Requisition Name: 9000900149
- Business Unit: IT
- Requisition ID: 9000900149
- Requisition Date: 11/24/2025
- Requester: MD_PO_DPT_REQUEST_PRCR
- Entered By: MD_PO_DPT_REQUEST_PRCR
- Total Amount: 0.00 USD
- Request State: Canceled** (highlighted with a red box)

The 'Requisition Lifecycle' section shows a sequence of steps: Requisition, Approval, Inventory, Purchase Order, Change Request, Receiving, Return, Invoice, and Payment. The 'Approval' step is marked with a green checkmark.

The 'Lines' section contains a table with the following data:

Item Image	Description	Item ID	Ship To	Line State	Quantity	UOM	Price	Total Amount
	Line 1 - JAM Paper® Printer Paper, Letter Size (8 1/2 x 11), 80 Lb, Silver Starstream Metallic, Ream Of 25 Sheets	ID00080003		Canceled		Cello Pack	13.94	13.94 USD

Lecture 1: Activities and Exercises



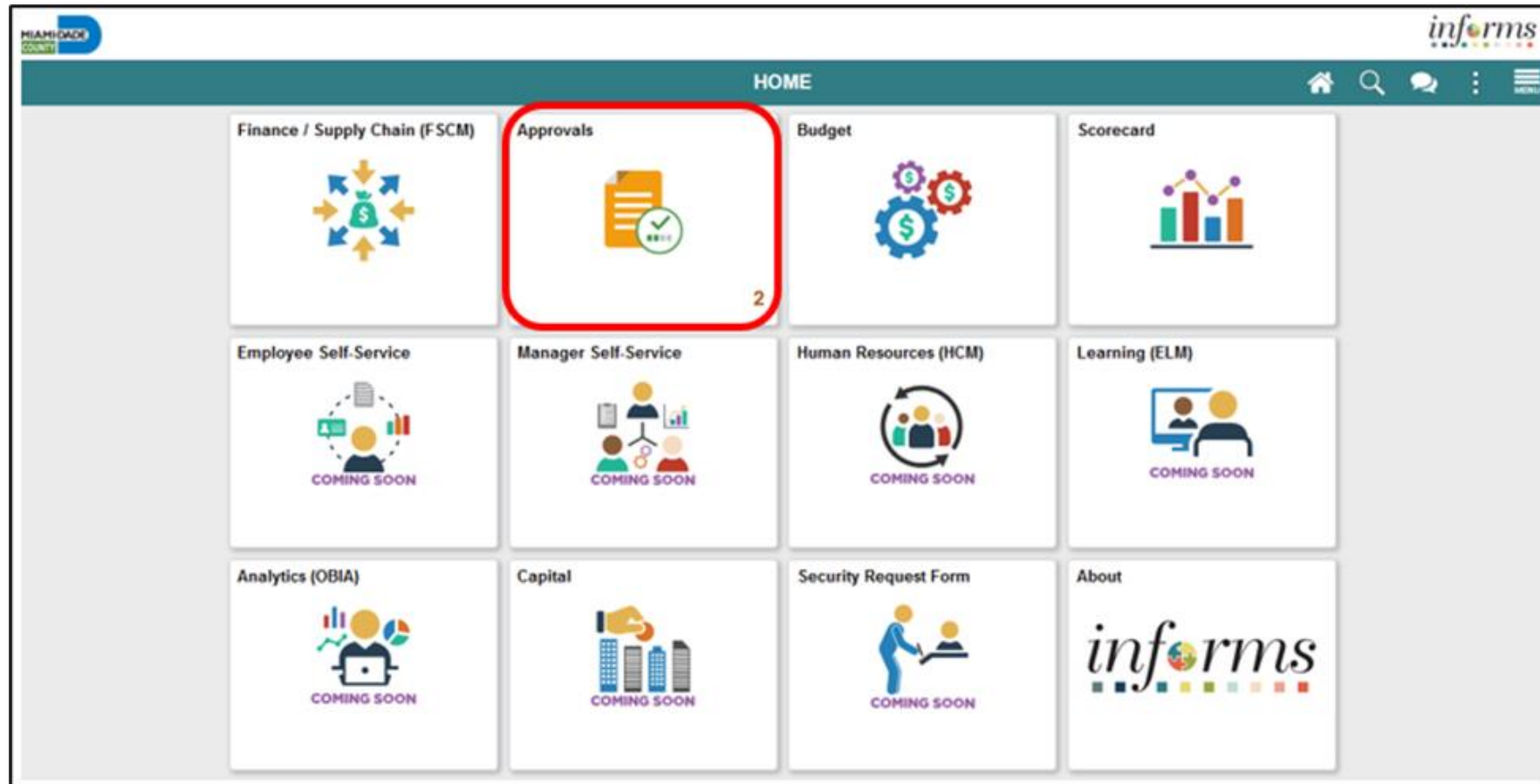
Lesson 1: Lesson Summary

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

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

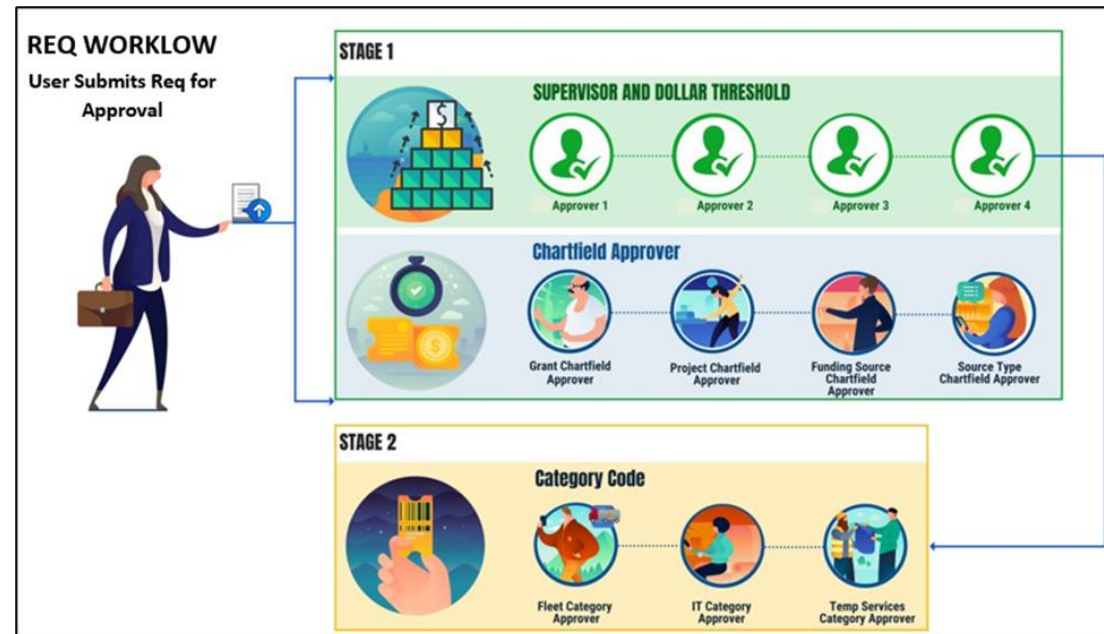
Lecture 1: Approve a Requisition

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



Lecture 1: Approve a Requisition

As discussed earlier in the key change section. Miami-Dade County has adopted a standard approval workflow for requisitions. Specific security roles have been created, and departments will assign staff based on their delegated authority. The workflow conditions include:



Lecture 1: Approve a Requisition

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

The screenshot shows a web application interface for 'Pending Approvals'. On the left, there is a sidebar with a 'View By' dropdown set to 'Type'. Below it, there are two buttons: 'All' (with a blue circle icon and a '2' badge) and 'Requisition' (with a shopping cart icon and a '2' badge). The 'Requisition' button is highlighted in green. The main content area has a teal header bar with the title 'Pending Approvals' and navigation icons. Below the header, there are three buttons: 'Approve' (green), 'Deny' (grey), and 'Pushback' (grey). A table of requisitions is displayed with the following data:

Requisition			2 rows
<input type="checkbox"/>			
<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 >

Below the table is a section for 'Approver Comments' with a text input field.

Lecture 1: Approve a Requisition

Select the **HEADER COMMENTS AND ATTACHMENTS** button. This action will route 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_PCBSR

Requisition ID: 0000000043
Requisition Date: November 5, 2020
Entered by: MD_PO_DPT_REQUISITION_PCBSR
Budget Header Status: Not Budget Checked

More Information

Header comments and attachments >

>

Lines

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

Approver Comments

Approval Chain >

Lecture 1: Approve a Requisition

The approver should validate that the market research provided meets the standards set by the departments purchasing unit. If the requisition requires a sourcing event. This information will be used to develop the event. Select the **CLOSE** button.


Requisition Header Comments and Attachments

Business Unit SP

Requisition ID 0000000043

Header Details

▼ Comment 1

Sequence	Attached File
1	 Word_-_Documentum.docx

Lecture 1: Approve a Requisition

Select the **MORE** button. This action will route 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

1 row

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

[Approver Comments](#)






[Approval Chain](#) >

Lecture 1: Approve a Requisition

The approval line detail page displays the requisition line and shipping information. After confirming all fields are correct, select the **MORE** button.

[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 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 >

Lecture 1: Approve a Requisition

The **Distribution Page** displays the ChartField entries selected by the requisitioner. The **CLOSE** button will route 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			

Lecture 1: Approve a Requisition

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

Approval Line Detail

Consulting
150,000.00 USD

Line Details

Business Unit: SP
Line: 1
Supplier
Price: 150,000.00 USD
Category: 90538

Requisition ID: 0000000043
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	MO_PO_DPT_REQUISITION_PROCESSR	2020-11-06

Lecture 1: Approve a Requisition

Requisition Header Page: Once all requisition values have been reviewed and confirmed. Select the **APPROVE** button. The system will display the approver comments page.

The screenshot shows a web application interface for a requisition. At the top, there is a teal header bar with a back arrow, the text "Pending Approvals", and the title "Requisition". On the right side of the header bar are icons for home, search, chat, and a menu. Below the header bar, the main content area has a light gray background. It displays "Request for EAMS Req ID" and "150,000.00 USD". To the right of this information are three buttons: "Approve" (highlighted with a red border), "Deny", and "Pushback". Below the buttons, there is a status section with a checkbox labeled "Header is pending your approval" and a status icon labeled "In Process". The "Summary" section follows, showing details like "Business Unit SP", "Routed Date November 5, 2020", "Requester MD_PO_DPT_REQUISITION_PRCR", "Requisition ID 0000000043", "Requisition Date November 5, 2020", "Entered by MD_PO_DPT_REQUISITION_PRCR", and "Budget Header Status Not Budget Checked". Below the summary is a "More Information" section with two links: "Header comments and attachments" and "View Printable Version". At the bottom, there is a "Lines" section.

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

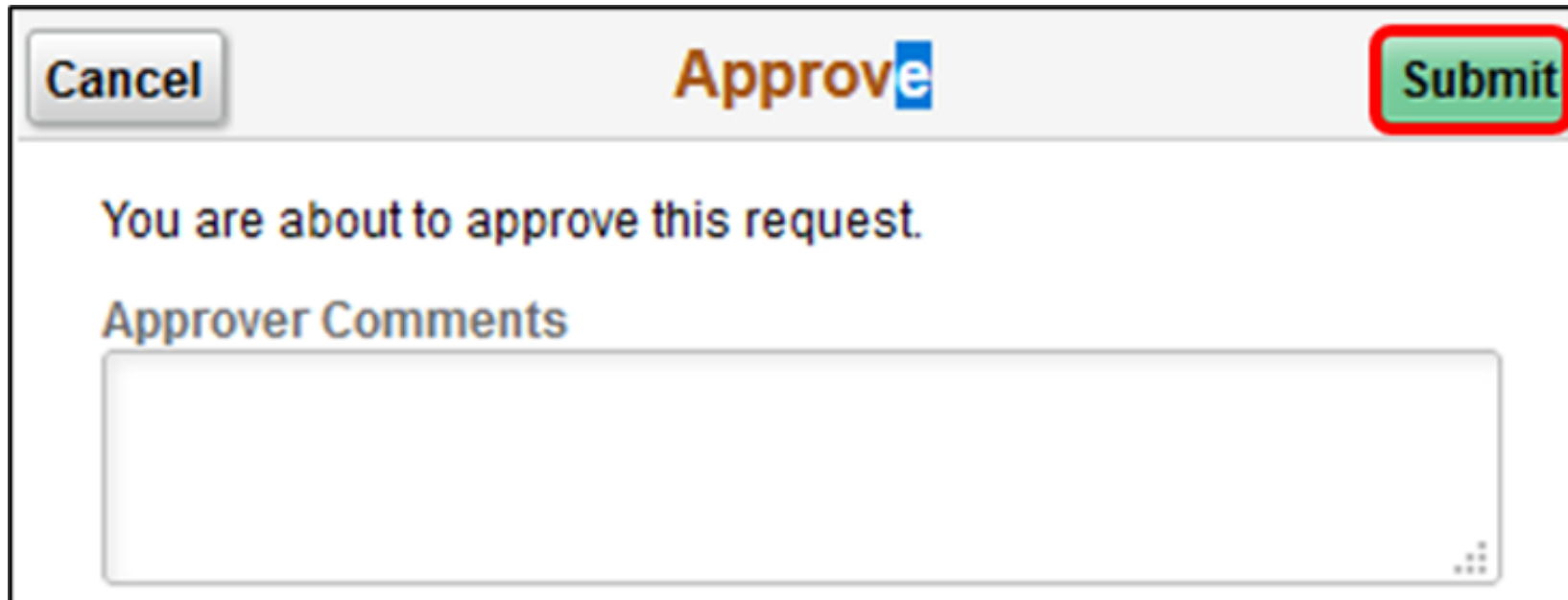
More Information

Header comments and attachments >
View Printable Version >

Lines

Lecture 1: Approve a Requisition

Enter **APPROVER COMMENTS**. These comments will be visible to the next approver and the requisitioner. Select the **SUBMIT** button. This action will route the back requisition header page.



The screenshot shows a modal dialog box titled "Approve". At the top left is a "Cancel" button. At the top right is a "Submit" button, which is highlighted with a red rectangular border. In the center of the dialog, the text "You are about to approve this request." is displayed. Below this text is a label "Approver Comments" followed by a large, empty text input field. In the bottom right corner of the input field, there are three small dots indicating a scrollable area.

Lecture 1: Approve a Requisition

Select the **PENDING APPROVALS** button. This action will route back to the pending approval page. Repeat all the steps discussed until all pending requisitions have been approved.

The screenshot displays a web application interface for a Requisition system. At the top, a teal header bar contains the text "Pending Approvals" on the left and "Requisition" on the right. Below the header, the main content area shows details for a requisition. A red rectangular box highlights the "Pending Approvals" text in the header. The requisition details include: "Request for LABS Req ID: 100.000.00 USD", "In Process - Multiple Approvers", "Business Unit: GP", "Routed Date: November 5, 2020", "Requester: MD_PO_DPT_REQUISITION_PROSR", "Requisition ID: 0010000043", "Requisition Date: November 5, 2020", "Entered by: MD_PO_DPT_REQUISITION_PROSR", and "Budget Header Status: Not Budget Checked". There are expandable sections for "More Information" (containing "Header comments and attachments" and "View Printable Version") and "Lines" (containing a table with one line item: "Consulting" for "100.000.00 USD"). An "Approval Chain" section is also visible at the bottom.

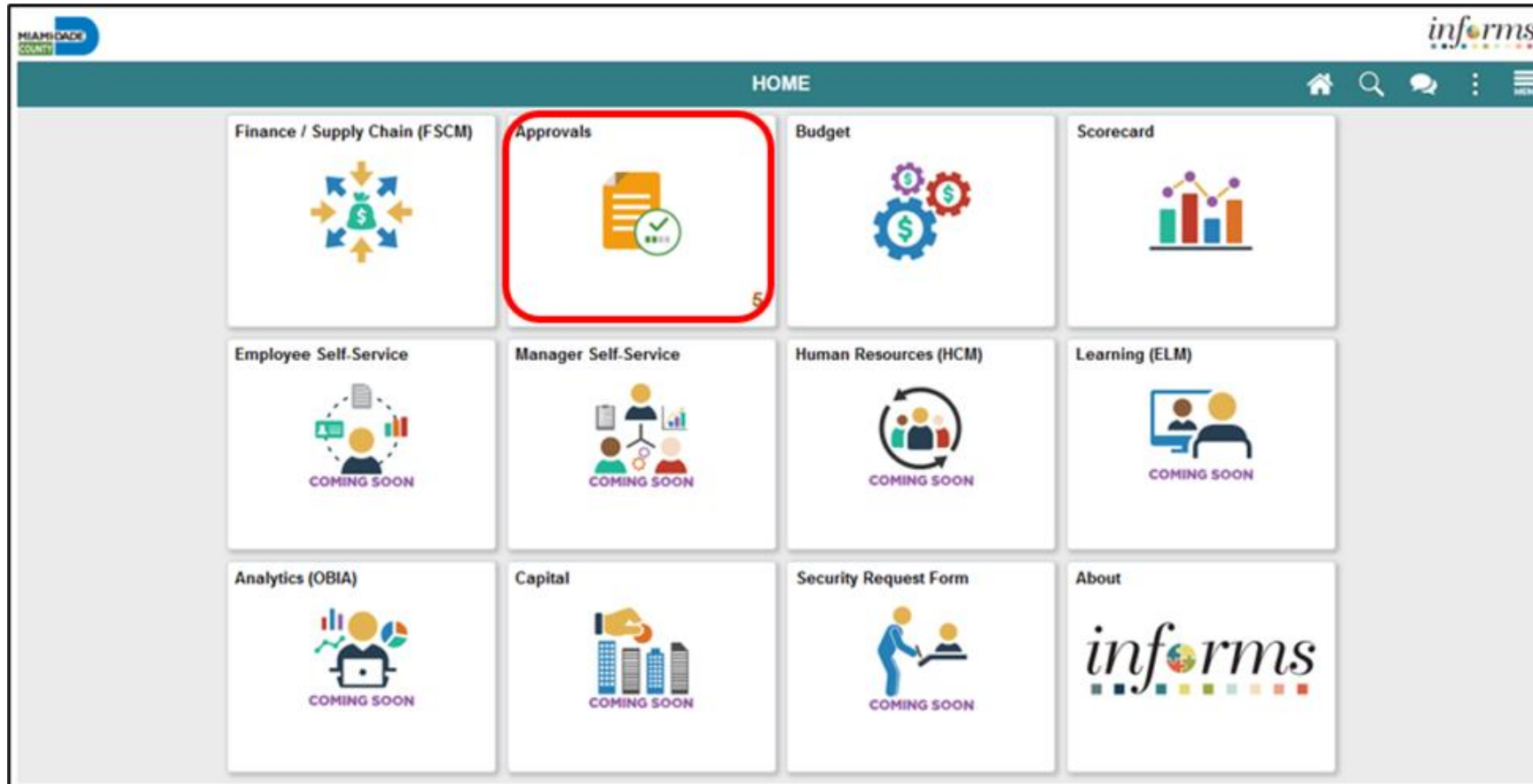
Line Number	Item Description	Merchandise Amount
1	Consulting	100.000.00 USD

Lecture 1: Activities and Exercises



Lecture 2: Deny a Requisition

Navigate to **Approvals** tile



Lecture 2: Deny a Requisition

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

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 ⚠ Medium Priority	Routed 11/04/2020 >
Requisition	150,000.00 USD	EAMS Req ID - SP / 0000000045 MD_PO_DPT_REQUISITION_PRCR ⚠ Medium Priority	Routed 11/05/2020 >
Requisition	0.00 USD	EAMS Req ID - SP / 0000000046 MD_PO_DPT_REQUISITION_PRCR ⚠ Medium Priority	Routed 11/05/2020 >
Requisition	0.00 USD	EAMS REQ ID - SP / 0000000047 MD_PO_DPT_REQUISITION_PRCR ⚠ Medium Priority	Routed 11/05/2020 >
Requisition	400.00 USD	SP / 0000000048 MD_PO_DPT_REQUISITION_PRCR ⚠ Medium Priority	Routed 11/05/2020 >

Lecture 2: Deny a Requisition

The **Requisition Header Approval Page** displays the requisition header, lines, and approver comments. Select the **HEADER COMMENTS AND ATTACHMENTS** button. This action will route the approver to the requisition header comments and attachments page.

The screenshot shows the 'Requisition' page for a pending approval. The top bar includes a back arrow, the title 'Requisition', and icons for home, search, chat, and a menu. Below the title, it says 'Request for SP0000000048' and '500.00 USD'. There are three buttons: 'Approve' (green), 'Deny' (grey), and 'Pushback' (grey). A status bar indicates 'Header is pending your approval' and 'In Process'.

The 'Summary' section displays the following information:

- Business Unit: SP
- Requisition ID: 0000000048
- 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

Below the summary is a 'More Information' section with two links: 'Header comments and attachments' (highlighted with a red box) and 'View Printable Version'.

The 'Lines' section shows a table with one row:

Line Number	Item Description	Merchandise Amount
1	test	500.00 USD

At the bottom, there are two input fields: 'Approver Comments' and 'Approval Chain'.

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

Pending Approvals **Requisition**

Request for SP0000000048
500.00 USD

[Approve](#) **[Deny](#)** [Pushback](#)

☐ Header is pending your approval
In Process

Summary

Business Unit	SP	Requisition ID	0000000048
Requested 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	test	500.00 USD

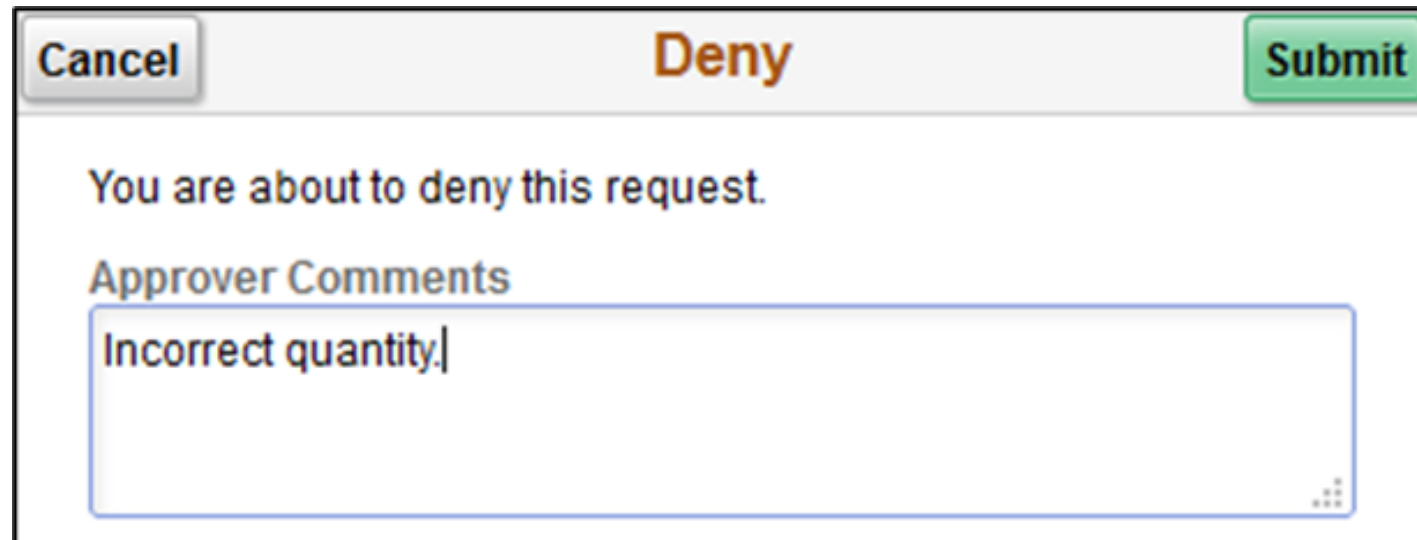
Approver Comments

Approval Chain

[Approval Chain](#)

Lecture 2: Deny a Requisition

The requisition approver should enter explicit comments explaining the reason for denying the requisition. The approver's comments will be visible to the requisitioner. Enter approver comments. Select the **SUBMIT** button. This action will return the approver to the requisition header page.



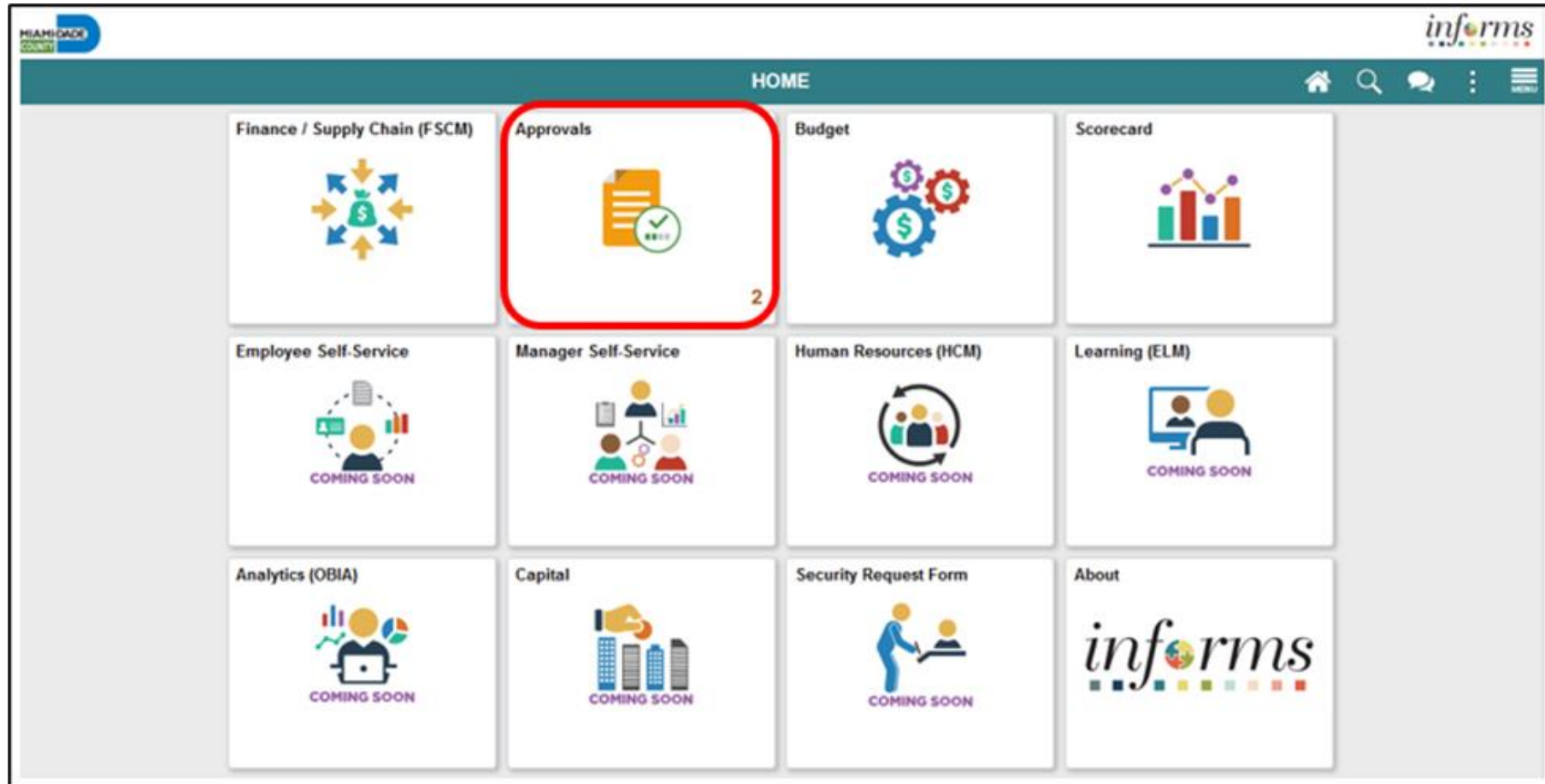
The screenshot shows a modal dialog box titled "Deny". At the top left is a "Cancel" button, and at the top right is a green "Submit" button. The main content area contains the text "You are about to deny this request." followed by a label "Approver Comments". Below the label is a large text input field containing the text "Incorrect quantity." and a small "x" icon in the bottom right corner of the field.

Lecture 1: Activities and Exercises



Lecture 3: Pushback a Requisition






Select the **APPROVALS** tile.



Lecture 3: Pushback a Requisition


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

Pending Approvals




View By

Type




All

1



Requisition

1




All

Requisition

150,000.00 USD

EAMS Req ID - SP / 0000000043 MD_PO_DPT_REQUISITION_PRC

 Medium Priority

1 row

Routed

11/05/2020

>

Lecture 3: Pushback a Requisition

Select the **HEADER COMMENTS AND ATTACHMENTS** button. This action will route the approver to the requisition header comments and attachments 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
Routed Date: November 5, 2020
Requester: MD_PO_DPT_REQUISITION_PRCR

Requisition ID: 000000043
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	Consulting	150,000.00 USD

1 row

Approver Comments

Approval Chain >

Lecture 3: Pushback a Requisition

Select the **PUSHBACK** button once all requisition values have been reviewed and confirmed. The system will display the approver comments page. Only the second, third, and or fourth approvers can use the pushback functionality.

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
Routed Date: November 5, 2020
Requester: MD_PO_DPT_REQUESTION_PRCR

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

More Information

Header comments and attachments >
View Printable Version >

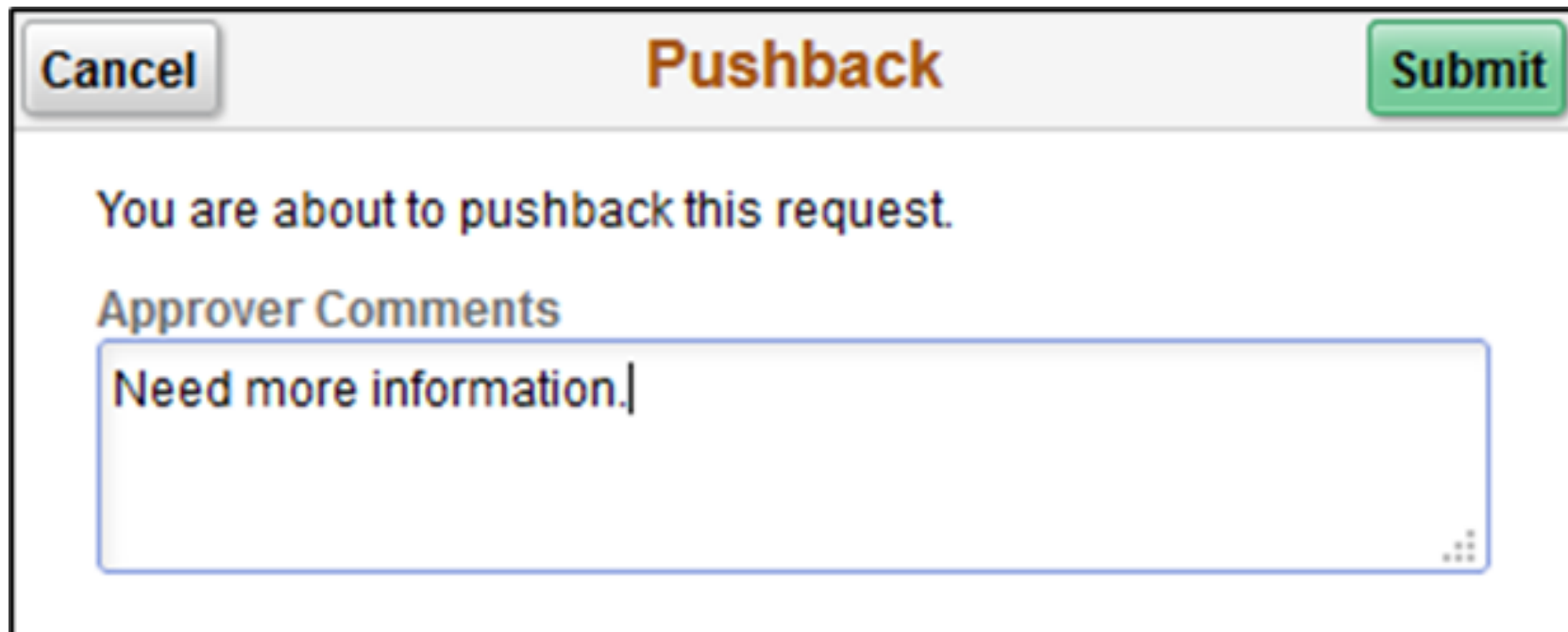
Lines

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

Approver Comments
Approval Chain >

Lecture 3: Pushback a Requisition

The approver should enter clear comments requesting clarification on transaction specifics. Select the **SUBMIT** button. This action will return to the **Requisition Header Page**.



The screenshot shows a 'Pushback' dialog box with a light gray header bar. On the left is a 'Cancel' button, in the center is the title 'Pushback' in orange, and on the right is a green 'Submit' button. Below the header, the text 'You are about to pushback this request.' is displayed. Underneath is the label 'Approver Comments' followed by a large text input field containing the text 'Need more information.' and a small 'x' icon in the bottom right corner of the field.

Lecture 3: Pushback a Requisition

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

Approval Chain

MD Requisition Approval

EAMS Req ID

Pending

Start New Path

Department ID Approver

Pending

MD_PO_DPT_REQ_APRVR1

Department Requisition Approv1

Pushed Back

MD_PO_DPT_REQ_APRVR2

Requisition Dollar Approver2

11/05/20 5:15 PM

Not Routed

Multiple Approvers

Requisition Dollar Approver3

Comments

MD_PO_DPT_REQ_APRVR2 at 11/05/20 - 5:15 PM

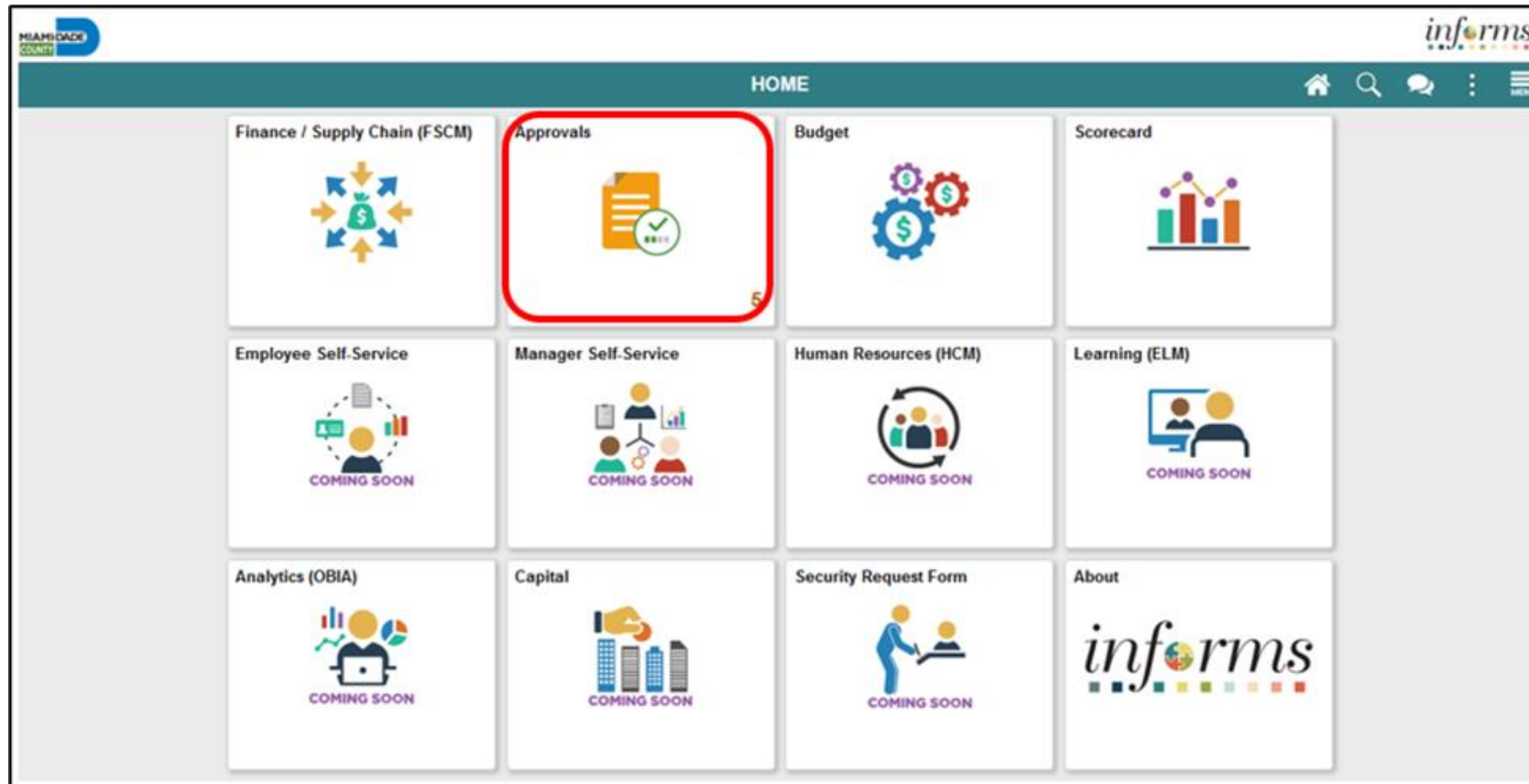
Need more information.

Lecture 1: Activities and Exercises



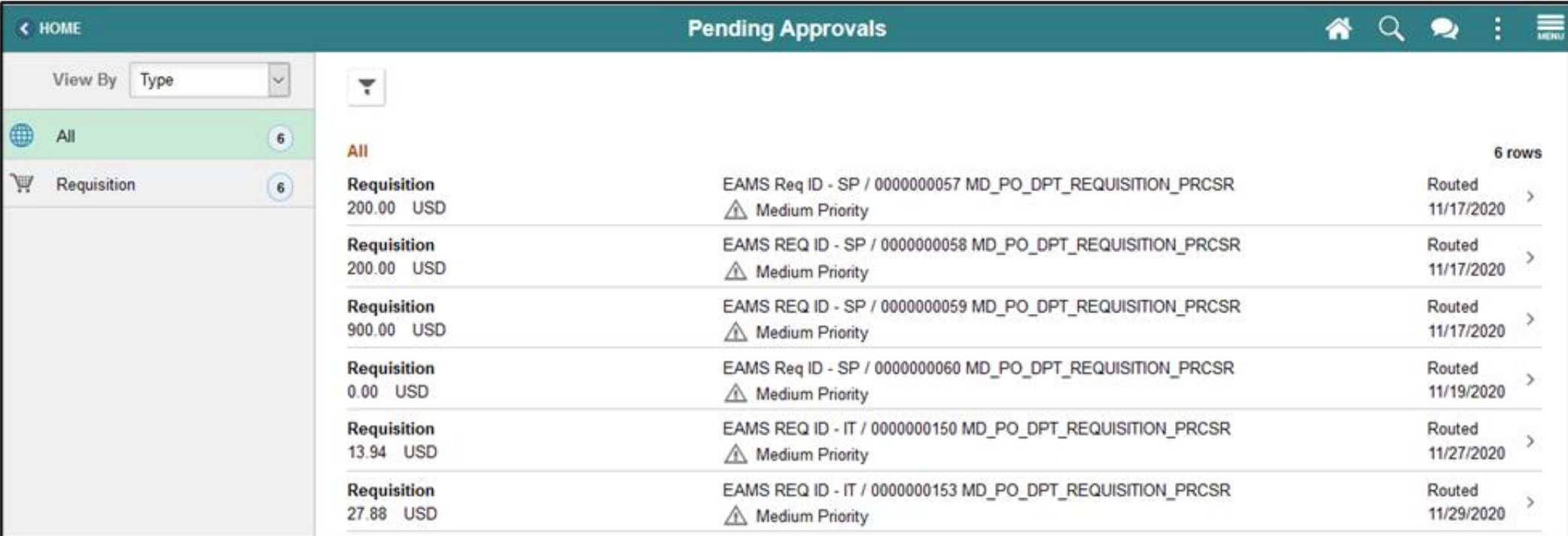
Lecture 4: Hold a Requisition

Navigation to: **Approvals tile**



Lecture 4: Hold a Requisition

Select the **ALL** button. This action routes the approver to the requisition header approval page. Approvers should review all four layers of a requisition and comments/attachments before taking action.



The screenshot displays a web application interface titled "Pending Approvals". On the left, there is a sidebar with a "View By" dropdown set to "Type". Below this, two buttons are visible: "All" (highlighted in green with a count of 6) and "Requisition" (with a count of 6). The main content area shows a table of pending requisitions. The table has columns for the requisition type and amount, the requisition ID and description, the priority level, and the status and date. There are 6 rows of data, all marked as "Routed" with a date. Each row includes a right-pointing arrow for further action.

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

Lecture 4: Hold a Requisition

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

Pending Approvals **Requisition**

Request for EAMS REQ ID
27.88 USD

[Approve](#) [Deny](#) [More](#)

☐ Header is pending your approval

In Process

Summary

Business Unit	IT	Requisition ID	0000000153
Routed Date	November 29, 2020	Requisition Date	November 29, 2020
Requester	MD_PO_DPT_REQUISITION_PRCRSR	Entered by	MD_PO_DPT_REQUISITION_PRCRSR
		Budget Header Status	Not Budget Checked

More Information

[View Printable Version](#)

Lines

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

Approver Comments

Approval Chain

Lecture 4: Hold a Requisition

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



The screenshot displays a web application interface for managing requisitions. At the top, there is a header bar with a back arrow, the text 'Pending Approvals', the title 'Requisition', and navigation icons. Below the header, the main content area shows details for a 'Request for EAMS REQ ID' with a value of '27.99 USD'. A status message indicates 'Header is pending your approval' and 'In Process'. A 'Summary' section provides details: 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. On the right side, there are three buttons: 'Approve' (green), 'Deny' (grey), and 'More' (grey). The 'More' button is highlighted with a red box. A dropdown menu is open from the 'More' button, showing two options: 'Pushback' (grey) and 'Hold' (grey). The 'Hold' button is highlighted with a red box.

Lecture 4: Hold a Requisition

The requisition approver should enter explicit comments explaining the reason for holding the requisition. The approver's comments will be visible to the requisitioner. Select the **SUBMIT** button once comments are entered. This action will return the approver to the requisition header page.



The screenshot shows a dialog box titled "Hold" in orange text. At the top left is a "Cancel" button, and at the top right is a green "Submit" button. Below the title bar, the text "You are about to put this request on hold." is displayed. Underneath this is a section labeled "Approver Comments" in blue text, followed by a large, empty text input field with a small icon in the bottom right corner.

Lecture 1: Activities and Exercises



Module 4: Course Summary

Module Topics

Course Content Summary

Additional Training and Job Aids

Course Summary

Module 4: Course Summary

Congratulations on completing the SCM 201 course! Users now should be able to:

- Manage and Record Requisitions

Additional Training and Job Aids

- Create and Edit a Requisition User Productivity Kit (UPK)
- Create a Web Supplier Requisition (UPK)
- Create a Special Requisition (UPK)
- Copy a Requisition (UPK)
- Cancel a Requisition (UPK)
- Approve a Requisition (UPK)



Congratulations on successfully completed the *Manage and Record Requisitions* course!

SCM 201– Manage and Record Requisitions