EP.020.501 – CREATING A GEORGIAFIRST MARKETPLACE REQUISITION

Purpose	• To understand what a Georgia*FIRST* Marketplace Requisition is. • To describe how to set requisition settings. • To identify how requisition settings carry over to the line, shipping, and accounting sections of the requisition. • To describe how to enter line items. • To identify where requisition comments can be added for designated areas. • To identify how to pre-budget check the requisition. • To identify where to review and submit the requisition. • To identify where to locate the requisition approval path.
Description	A requisition in eProcurement is used to request items or services and users can create two types of requisitions: a Special Requisition or a Georgia*FIRST* Marketplace (GFM) Requisition. A GFM Requisition is built from selected contract or catalog items in the Georgia*FIRST* Marketplace–usually referred to as a CAT (Catalog) Requisition. Additionally, there are three key stages of creating a requisition: Setting Requisition Defaults, Adding Items and Services, and Reviewing and Submitting. After users save and submit a requisition, it routes for approval and budget checking. Once requisitions are approved and budget checked, they can be sourced to purchase orders and dispatched to the supplier.
Security Role	**BOR_EP_MAINT_REQ**
Dependencies/ Constraints	None

Additional Information	If users need to create requisitions for multiple requesters, then user preferences for the user ID must specify that users are authorized to enter for other requesters. Requisition defaults as specified on the Requester Setup page will default onto the requisition unless changes are made using Requisition Settings page. For more information, see eProcurement Requisition Settings.

Procedure

Below are step by step instructions on how to create a GFM requisition in eProcurement.

Step	Action
1.	Click the **NavBar** icon.
2.	Click the **Menu** icon.
3.	Click the **eProcurement** link.
4.	Click the **Create Requisition** link. The system navigates to the Create Requisition page.
5.	On the Requisition Page users can define their requisition settings. **Requisition Settings** are default settings that transfers through to each requisition line item. If users would like to use this option, click the Requisition Settings link. For more information on Requisition Settings, see the eProcurement Requisition Settings job aid.
6.	Click the **GAFirstMarketplace** link. The system navigates to the marketplace.
7.	Select items to purchase. ***Note****: this business process does not explain how to navigate within the GeorgiaFIRST marketplace. This business process is specific to creating the requisition within eProcurement. For more information on the GeorgiaFIRST Marketplace including how to navigate the marketplace, see the eProcurement and GeorgiaFIRST Marketplace User's Guide for Requesters.*

Step	Action
8.	Once users select the "Issue Requisition" button, The system navigates to the Checkout – Review and Submit page. On the Checkout - Review and Submit page users can review the Requisition and modify it, if needed.
9.	Users can modify the following fields within the **Requisition Summary**: • **Requester**: the Requester field displays the name of the requester for this requisition. To create a requisition on behalf of another requester, users can change this field if they have the appropriate user preference. For example, if a Requester is returning a cart for a Shopper, the Requester can enter the Shopper's username in the Requester field. This action will display a dialog box that notifies the Requester that 'Changing Requester will change the default settings'. The Requester is then given the option to click: ○ Yes: to retrofit/apply the default values for the new requester to the existing lines ○ No: to change only the default setting (Requester) ○ Cancel: to reset the Requester to the previous value ***Note****: if users need access to create a requisition on behalf of another Requester and do not have access, contact the institution's Security Administrator.* • **Requisition Name**: the Requisition Name field allows users to enter a description of the request to help users identify the requisition as it flows through the system. If this field is left blank, the system uses the Requisition ID as the name.
10.	Verify the **Description**, **Supplier**, **Quantity**, **UOM**, **Price**, and **Line** comments in the Requisition Lines section default from the item information in the Georgia*FIRST* Marketplace. ***Note****: Only certain fields can be edited on a GeorgiaFIRST Marketplace Requisition once it is submitted. For example, Item Description, Item Quantity, and Amount cannot be edited after the requisition is submitted.*

Step	Action
11.	To view additional information, select the **Line Details** icon. The system generates a popup window where the user can view additional details on the line such as Category code, the Amount Only checkbox, contract information, and other line-specific information. Once users finish viewing the Line Details page, click the OK button. The system navigates back to the Checkout – Review and Submit page.
12.	To view and/or add comments, select the **Add** link under the Comment column. The Line Comment window appears to add comments or attachments to a requisition line. Users can add comments and/or attachments by following instructions below: • To add comments, type comments into the textbox. Enter the comment in the textbox. Click the OK button. Select the Send to Supplier, Show at Receipt and/or Show at Voucher check box, depending on where the comments need to appear. • To add an attachment(s), click the Add Attachments button. Browse to locate the file to upload. Once located, click on Upload. Click the OK button.
13.	To delete an item, click the checkbox next to the line number and then click the **Delete** icon.
14.	To review shipping information on each line, select the expand triangle icon to the left of the requisition line item to expand the line. Once the line item is expanded, users can: • Modify the **Ship To** and **Attention To** fields • Add comments to the **Ship To Comments** and add attachments to the **Ship To Attachments** ***Note****: If multiple lines on the requisition need the same modification, click on the Mass Change link, and make the necessary adjustment(s). See Section 2: Mass Update Page Information for additional information on the Mass Change page.*
15.	The **Add ShipTo Comments** link routes users to the Requisition Ship To Comments page where users can enter additional comments for the Ship To value on the shipment schedule level of the requisition and also include one or more attachments to user's comments.

Step	Action
16.	To modify the **ChartField**, **Asset**, and **Budget** information, click the expand triangle to the left of the Requisition Line, then click the expand triangle to the left of the Accounting Lines section. ***Note:*** *If all items on the requisition need the same Accounting Lines modifications, click the Select All/Deselect All checkbox, click the Mass Change link, and make the necessary adjustment(s).*
17.	The **Accounting Lines** box includes eight tabs with information for users to enter and/or review. The applicable tab information and fields are as follows: • If the institution uses SpeedCharts, enter or select a **SpeedChart** in the corresponding field to apply the SpeedChart to the accounting line. • If the institution does not use SpeedCharts, enter the information listed below as needed: ○ **Chartfields1**: this information should prefill - shows requisition line, status, Dist Type, Location (required), Quantity, Percent, Merchandise Amount, General Ledger Unit, and Entry Event. ○ **Chartfields2**: where basic budget information is stored including Account, Fund, Dept, Program, Class, and Budget References. The system prefills default information from the category code. The remaining fields could autofill and/or a user can update. ○ **Chartfields3**: where project ChartField is stored (optional). ○ **Asset Information**: user must enter this info - where asset information is stored, if the line item is an asset including Asset Management Business Unit, Profile ID, Tag Number (optional).

Step	Action
18.	Navigate to the **Requisition Comments and Attachments** section to enter comments and attachments at the requisition header level. Users can add comments and/or attachments by following instructions below: • To add a comment, type comments directly into the textbox or click the **Add More Comments and Attachments** link on the bottom right side of the page. When finished adding comments, click the OK button. • To add an attachment, click the **Add Attachments** button. Browse to locate the file to upload. Once located, click on Upload. Then click OK. Select the Send to Supplier, Show at Receipt and/or Show at Voucher check box, depending on where the comments need to appear**.**
19.	To add comments for the Approver to review, enter comments in the **Approval Justification** section.
20.	At this point, the user has the option to **Pre-Budget Check** the requisition. When running a budget pre-check, the budget processor performs a budget check but it does so without posting to the general ledger records and will not pre-encumber funds. The pre-budget check feature is specifically intended to check one document but does not update the Commitment Control tables (ledger and activity log). This does not guarantee these funds will be available at the time the Budget Check is initiated (following approvals). When you perform budget pre-check only processing, the statuses of *Provisionally Valid* or *Error* on the transaction pages indicate whether a budget is available. If you click the pre-check budget link and if the budget check is valid, then the system sets the budget header status for the requisition to *Prov Valid*. If the budget check is not valid, then the system sets the budget header status to *Error* with a link to the Exception page. To perform the pre-budget check, click the **Pre-Check Budget** link. ***Note:*** *You can also perform pre-check budget from the Confirmation page.*
21.	To review the workflow approval path, click the **Preview Approvals** link at the bottom of the page.

22.	Users can either save a draft requisition for further editing and/or review or save and submit the requisition into the workflow. • Option 1: To submit the requisition into the workflow process for approvals, click the **Save & Submit** button. • Option 2: To save the requisition for later, click the **Save for Later** button. This action saves the requisition but does not submit it. The Requisition ID can be found at the top of the page after selecting this button.
23.	The Confirmation page opens. From this page users can: • View Printable Version • Edit the Requisition. For more information on how to edit a requisition, see EP.020.550 - Editing, Saving, and Submitting a Requisition. • View the Approval Path and the Approvers for each step (if Multiple Approvers exist for a step, click the link to see who can approve the Requisition) • Pre-Check Budget • Create New Requisition • Navigate back to Manage Requisitions page

Section 2: Mass Change Page Information

The Mass Change page is used to modify line information, shipping instructions, and accounting details for requisition lines selected prior to clicking the Mass Change button. If all lines on a requisition need the same change, use of the Mass Change page is a time saving option.

In each section, enter information into the field or fields that you wish to change. The mass change page can be used to update a single field in one section or to update multiple fields in each of the sections. In order to enter ChartField information in the Accounting Lines section, first select a value in the GL Unit field (this is the Business Unit number).

Once all values you wish to change are entered, select the OK button. If values were entered in the accounting lines section, the Distribution Change Options box will open and users must select an option to continue.

The options that appear in this window are dependent on the changes made. Select one of the following options, and click the OK button to apply the change:

- **All Distribution Lines:** Select to apply changes to all existing distribution lines.
- **Matching Distribution Lines:** Select to apply changes to each existing distribution lines by matching the distribution line numbers.
- **Replace Distribution Lines:** Select to remove the existing distribution lines and replace them with the distribution line changes.

Once users select OK, the system navigates to the Checkout – Review and Submit page. Users should expand a requisition line and review the information to ensure changes were made as expected.