

## QUICK REFERENCE GUIDE

### *Create an Open Market Requisition with an Item ID*

*January 10, 2016*

## **Create an Open Market Requisition with an Item ID**

A requisition is an internal document that agencies use to request a purchase. Creating an Open Market Requisition (OMR) for materials that have an Item ID for use on a Strategic Sourcing Event requires additional information. This guide provides the steps to create an OMR with an Item ID.

### **Overview of Open Market Requisitions**

Open Market Requisitions (OMR) are typically used for items that cost over \$10,000.00 and need to be bid out (e.g., Strategic Sourcing Event). The solicitation process results in a purchase order. OMRs are entered in SWIFT's ePro module. They are further processed through a Strategic Sourcing Event by the Materials Management Division or the agency. The agency processes these events if they have Authority for Local Purchase.

### **Process Steps to Create and OMR with an Item ID for an Event**

#### **Step 1: Update the Item ID with the Per Unit Price**

The *Item ID* to be used on a requisition needs to have a starting price loaded into SWIFT. This price allows SWIFT to create a pre-encumbrance. Contact the SWIFT Help Desk with the required Item ID's and per unit price. They will ensure that the SWIFT information is updated.

#### **Contact the SWIFT Help Desk:**

- Email: [swifthelpdesk.mmb@state.mn.us](mailto:swifthelpdesk.mmb@state.mn.us)
- Phone: 651-201-8100, option 2

#### **Step 2: Define the Requisition using the Item ID.**

- Once the *Item ID* has been updated, create an Open Market Requisition using the *Item ID*.
- **Navigation:** eProcurement, Create Requisition
- On the **Create Requisition** page/ **1. Define Requisition** tab, enter the following fields.
  - *Business Unit:* Validate the default or enter a business unit.
  - *Requester:* Defaults to the person entering the Requisition, but can be changed.
  - *Requisition Name:* Create a name.
  - *Origin:* This code represents which division, area or business unit that originated this requisition.
  - *Agency Reference:* Carries over to the purchase order and prints on it.
  - *Billing Location:* Where invoices are sent for this business unit.
  - *Doc Type:* **OMR**

### Create Requisition

1. Define Requisition | 2. Add Items and Services | 3. Review and Submit

Specify requisition name, requester, and other information that applies to the entire requisition.

Business Unit: G1001 Minnesota Management & Budget Origin: 509 Accounting Services Doc Type: OMR-Open Market Rec (Buyer Only): \*Currency: USD

\*Requester: Employee ID Employee Name Suggested Vendors

Requisition Name: SAMPLE REQUISITION Agency Reference: SAMPLE Priority: Medium

Approval Exception Billing Location: G104THFL00

- Expand the **Line Defaults** section. You can enter shipping and accounting information here. Entering the values in *Line Defaults* section and selecting the "Override" *Default Option* will populate those values on each line of the requisition. Or you can enter them on the **Review and Submit** page of the requisition. Enter each line manually.
- Enter the following fields as needed.
  - Default Options*:
    - Selecting "Default" will apply any defaulted values into any blank fields from the Line Defaults section to all lines of the requisition. It will not override values that already exist.
    - Selecting "Override" will override any defaulted values with the values entered in the Line Defaults to all lines of the requisition. **NOTE:** This option may be helpful with requisitions with multiple lines.
  - Shipping Defaults*: The *Ship To* value is required. You can also add the *Due Date* and *Attention* fields as needed.
  - Accounting Defaults*: The *ChartFields* values are required. You can also add the *Details* and *Asset Information* as needed by your agency.
- Click the **Continue** button when you are done with the **Define Requisition** page.

**Line Defaults**

**Default Options**

Default If you select this option, the defaults specified below will be applied to requisition lines when there are no predefined values for these fields.

Override If you select this option, the defaults specified below will override any predefined values for these fields, only non-blank values are assigned.

Vendor: Buyer: Vendor Location: Category: Unit of Measure:

**Shipping Defaults**

Ship To: G104THFL00 [Modify Onetime Address](#)

Due Date: Attention:

**Accounting Defaults** Personalize | Find | First 1 of 1 Last

Pct	Location	GL Unit	Fund	Fin DeptID	AppropriID	Account	Sub Acct	SW Cost	Agcy Cost 1	Agcy Cost 2	PC B
	G104THFL00	MN001	2001	G1037200	G100018						

Continue

**Step 3: Add Items and Services.**

- On the **2. Add Items and Services** tab, select the **Detailed Catalog** tab.
- On the *Select a Catalog* dropdown menu, choose the one that applies to your agency (e.g., “MDH SSC Catalog”).
- Uncheck the **Return Contracts Only** checkbox.
- In the *Item ID* field, add the *Item ID* that you wish to add to the requisition. Click on **Search**.

**Create Requisition**

1. Define Requisition | **2. Add Items and Services** | 3. Review and Submit

Add lines to the requisition, specifying the information necessary to procure each item or service.

Detailed Catalog | Favorites | Templates | Forms | Web | Special Request

Browse Catalog

\*Select a catalog: MDH SSC Catalog

All Catalog

Return Contracts Only

Search Within Results

Search Catalog

Search contains all of the following search fields entered:

Clear

Search

Item Description:  Keyword:

Item ID: 52056 Account:

UNSPSC Category:  Contract ID:

Search Settings

- On the list of **Results**, select the line that does not have a contract reference. Notice that the order price is populated with the per unit price requested. Enter the *Quantity* needed and click the **Add** button.

7 Results

Sort Items: Item Description

First 1 - 7 of 7 Last

Quantity	Item ID	Item Description	Vendor ID	Vendor Name	Contract	Contract End Dt	Order Price
<input type="text" value="1.0000"/> Add	52056	Beaker, Berzelius, Graduated, Pyrex, 1000 ml, with Spout, 6 pk	0000202778	IDEXX DISTRIBUTION INC	0000000000000000000076607	03/31/2016	27.38000
<input type="text" value="1.0000"/> Add	52056	Beaker, Berzelius, Graduated, Pyrex, 1000 ml, with Spout, 6 pk	0000206299	VWR INTL INC	00000000000000000000037313	06/30/2015	27.38000
<input type="text" value="1.0000"/> Add	52056	Beaker, Berzelius, Graduated, Pyrex, 1000 ml, with Spout, 6 pk	0000227021	PERKINELMER HEALTH SCIENCES	0000000000000000000018031	06/30/2015	27.38000
<input type="text" value="1.0000"/> Add	52056	Beaker, Berzelius, Graduated, Pyrex, 1000 ml, with Spout, 6 pk	0000249692	FISHER SCIENTIFIC CO LLC	00000000000000000000037274	06/30/2015	27.38000
<input type="text" value="1.0000"/> Add	52056	Beaker, Berzelius, Graduated, Pyrex, 1000 ml, with Spout, 6 pk	0000384836	THERMO FISHER SCIENTIFIC	00000000000000000000037274	06/30/2015	27.38000
<input type="text" value="1.0000"/> Add	52056	Beaker, Berzelius, Graduated, Pyrex, 1000 ml, with Spout, 6 pk	0000840614	THERMO SCI PORTABLE ANALYTICAL INSTRUMENTS	00000000000000000000037274	06/30/2015	27.38000
<input checked="" type="checkbox"/> <input type="text" value="30.0000"/> Add	52056	Beaker, Berzelius, Graduated, Pyrex, 1000 ml, with Spout, 6 pk					27.38000

- The **Requisition Summary** at the top of the page shows the line you added.

Requisition Summary		
Description	Qty	UOM
Beaker, Berzelius, Graduat...	30	PK
Total Lines:		1
Total Amount (USD):		\$821.40

- Repeat the steps above for each *Item ID* to be added to the requisition. Once you have completed adding all the required items, click the **3. Review and Submit** tab at the top of the page.

**Step 4: Review and Submit the Requisition.**

- On the **3. Review and Submit** tab, you can add, review or change information.
- On the header, you can update the *Requester*, *Origin* and *Requisition Name*.

**Create Requisition**

1. Define Requisition      2. Add Items and Services      3. Review and Submit

Review the details of your requisition, make any necessary changes, and submit it for approval.

Business Unit: G1001 Minnesota Management & Budget      Origin: 509 Accounting Services      Doc Type (Buyer Only): OMR-Open Market Rec

\*Requester:      Suggested Vendors \*Currency: USD

Requisition Name: SAMPLE REQUISITION      Agency Reference: SAMPLE      Priority: Medium

- On the *Requisition Lines* section, click on the **Expand** icon to open the line.

Line	Description	Vendor Name	Quantity	UOM	Price	Total
1	Beaker, Berzelius, Graduated		30.0000	PACKAGE		

Expand icon      Line Details icon

Consolidate with other Reqs       Override Suggested Vendor

Shipping Line: 1      Due Date:      Quantity: 30.0000      Price:      + -

Status: Active      \*Ship To: H12SSCWHSE      [Modify Onetime Address](#)

Attention To:      [Add Shipto Comments](#)

- Make sure to select the appropriate *Ship To* for the Inventory Center.
- Click on the **Line Detail** icon to open up the **Sourcing Controls**. This icon is located on the far right of the requisition lines section.
- On the **Line Details** page, open up the **Sourcing Controls** section. Uncheck the **Inventory Source Flag**. Click **OK**.
- Repeat the above steps for each line on the requisition.

**Line Details**

Line: 1      Beaker, Berzelius, Graduated      Line Status: Open

▶ Item Details

▶ Contract

▶ **Sourcing Controls**

Calculate Price       Inventory Source Flag

  

**Step 5. Save and Submit the Requisition.**

- On the bottom of the **3. Review and Submit** page, click the **Save and Submit** button.

  

      

- SWIFT displays a confirmation page. Notice the *Requisition ID*.
- Click on **Check Budget**.

**Confirmation**

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Requested For:	Cunningham McComb, Shelia M 1000000004	Number of Lines:	1
Requisition Name:		Total Amount:	
<b>Requisition ID:</b>	<b>1000000004</b>		
Business Unit:	G1001		
Status:	Approved		
Priority:	Medium		
Budget Status:	Not Checked		

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- After the requisition passes the budget check, the *Budget Status* is "Valid". The *Status* is "Approved".
- The *Pre-Encumbrance Balance* is based on the unit price of the item.

**Confirmation**

Requested For:		Number of Lines:	1
Requisition Name:	1000000004	Total Amount:	0.00 USD
Requisition ID:	1000000004	Pre-Encumbrance Balance:	82.40 USD
Business Unit:	G1001	Encumbrance Balance:	
Status:	Approved		
Priority:	Medium		
Budget Status:	Valid		

- This requisition is complete and ready to be copied into a Strategic Sourcing Event. For more information about Strategic Sourcing, review the SWIFT **Strategic Sourcing Reference Guides**:

<http://mn.gov/mmb/accounting/swift/training-support/reference-guides/strategic-sourcing.jsp>