SWIFT STATEWIDE INTEGRATED FINANCIAL TOOLS

QUICK REFERENCE GUIDE

Updated October 11, 2022

Create an Open Market Requisition with an Item ID

Open Market Requisitions (OMR) are typically used for items that cost over $10,000.00 and need to be bid out via a Strategic Sourcing event. The solicitation process results in a purchase order.

Creating an 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 and process an OMR with an Item ID SWIFT.

Steps to complete

- Step 1: Update the Item ID with the Per Unit Price
- Step 2: Create the requisition
- Step 3: Validate or update defaults as needed
- Step 4: Enter the requisition item(s)
- Step 5: Process the requisition

Steps to create and process an Open Market Requisition with an Item ID

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

Before creating an OMR for an item, you need to update the *Item ID* with the per unit price. This price allows SWIFT to create a pre-encumbrance. Contact the SWIFT Help Desk with the required *Item ID* and per unit price. They will ensure that the SWIFT information is updated. Once the SWIFT team updates the *Item ID*, you can create an Open Market Requisition using the *Item ID*.

Contact the SWIFT Help Desk:

- Email: swifthelpdesk.mmb@state.mn.us
- Phone: 651-201-8100, option 2

Step 2: Create the requisition and enter required fields in the Defaults sections

1. Navigate to the *Create Requisitions* tile in the EProcurement module.

Navigation Options	Navigation Path
Navigation Collection	Procurement, EProcurement, Create Requisition, Requisition Defaults.

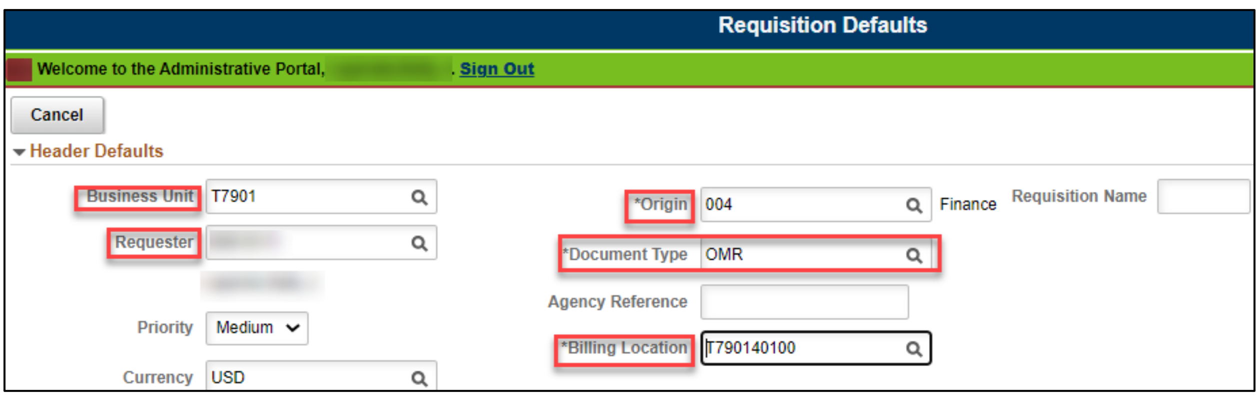
Adding information on the *Requisition Defaults* page carries throughout the requisition, such as *ChartFields* or *Ship To*.

2. On the *Header Defaults* section, enter or confirm these fields.
    a. *Business Unit*
    b. *Requester*, which is Employee ID

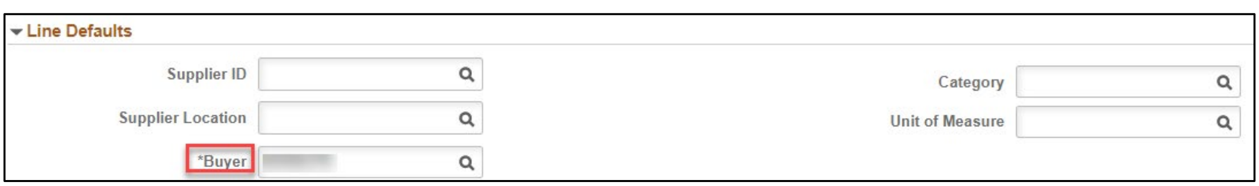
c. *Origin*
d. *Document Type*, enter "OMR"
e. *Agency Reference*, which is optional
f. *Billing Location*
g. *Requisition Name*, which is optional

Fields on the Header Default section of the Requisition
Required fields are marked with an asterisk (*)

Field	Field Description
***Business Unit**	The Business Unit typically corresponds to an agency, such as G1001 for Minnesota Management and Budget.
***Requester**	Defaults to the person entering the requisition, but it can be changed.
Requisition Name	Create a name that helps you organize it. It does not appear on the purchase order. If left blank, the Requisition Number will default in this field.
***Origin**	This code represents which division, area, or unit in the Business Unit that originated this requisition.
Agency Reference	Optional field that carries over to the purchase order and prints on it. Follow your agency's guidelines on this field.
***Billing Location**	Where invoices are sent for this Business Unit.
***Document Type**	OMR

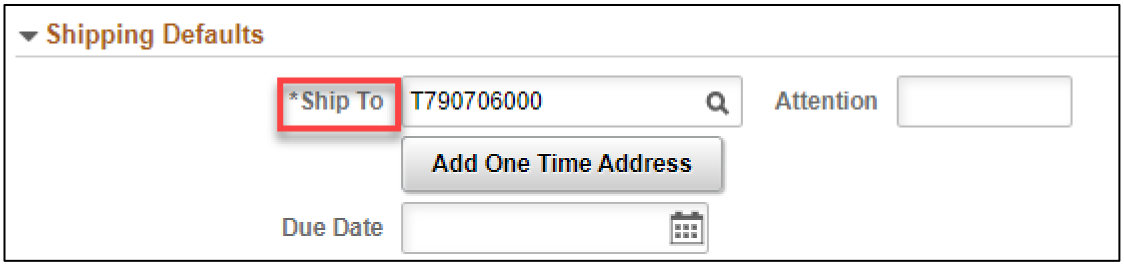


3. In the *Line Defaults* section, enter your Employee ID or the buyer who will be processing the requisition in the *Buyer* field. Buyer is a required field.



Step 3: Validate or update defaults as needed

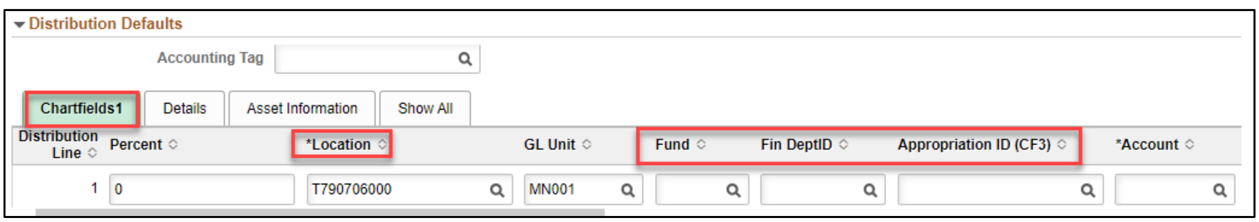
1. In the *Shipping Defaults* section, enter the "Ship To." This is where the supplier should deliver the items or where the work will be performed.



2. In the *Distribution Defaults* section, enter the ChartField values on the *Chartfields1* tab.

ChartField values are required on requisitions. ChartFields are agency-specific and should be obtained from the agency budget manager.

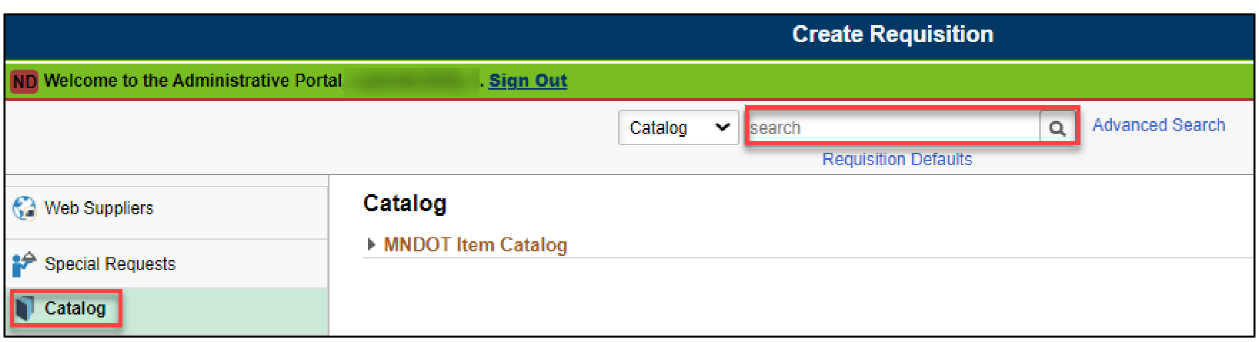
   a. *Location*
   b. *Fund*
   c. *Fin DeptID*
   d. *Appropriation ID*
   e. Other *ChartFields* as required by your agency



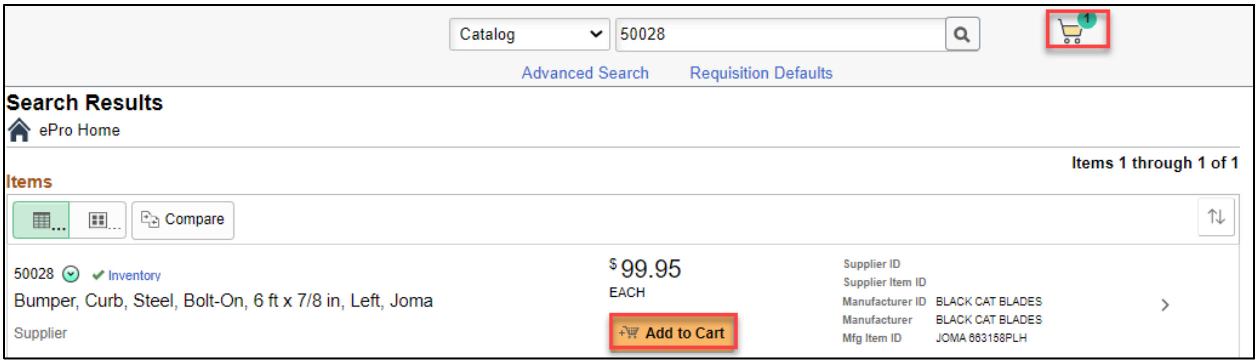
3. Select **Done** at the top, right corner of the page.

Step 4: Enter the requisition item(s)

1. SWIFT displays the *Create Requisition* page. Select *Catalog* from the left menu.
2. On the *Catalog* page, enter the *Item ID* into the *Search* area and select the **Search** box.



3. SWIFT displays the *Catalog Search Results* section with the *Item ID* you selected. Select the **Add to Cart** button. Repeat as needed for additional items.

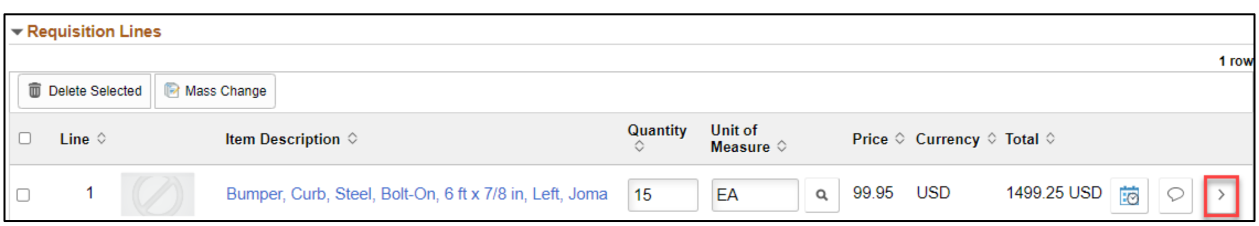


4. When finished adding items, select the **Shopping Cart** icon at the top of the page.

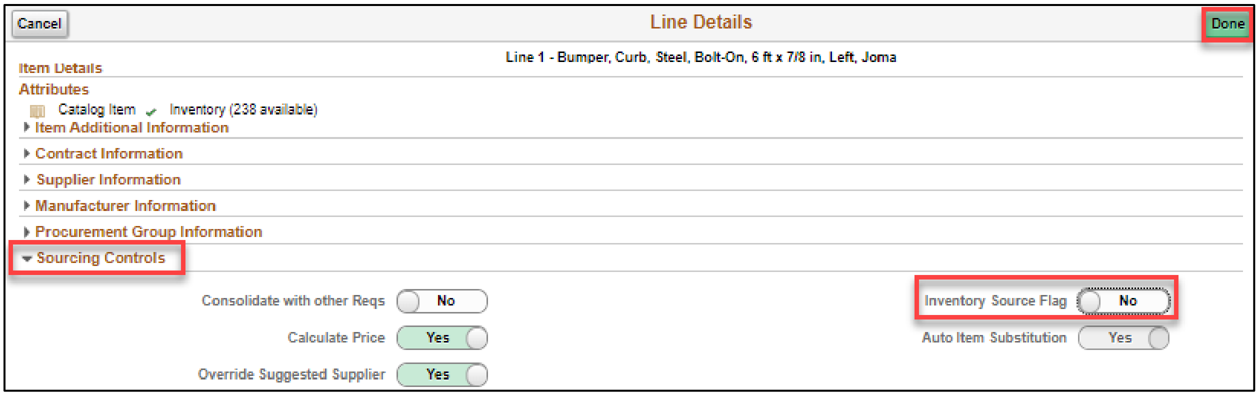
Step 5: Process the requisition

1. Review the requisition. SWIFT displays the *Shopping Cart* page. Update the quantity on each line as needed.

2. Select the **Checkout** button when complete.
   a. On the *Requisition Lines* section, select the **Expand** icon to open the line.
   b. Select the **Line Detail** caret to open up the *Sourcing Controls* section.

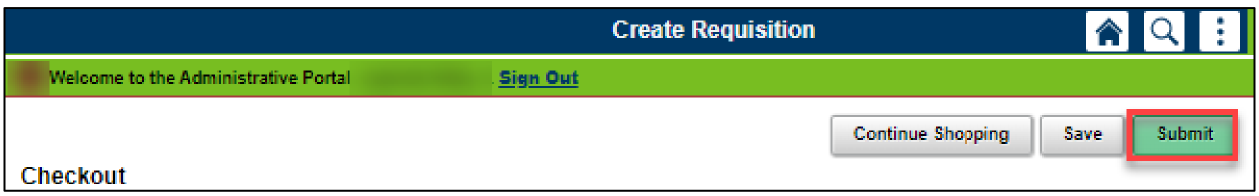


3. SWIFT displays the *Line Details* page for that line.
   a. Open up the *Sourcing Controls* section.
   b. Uncheck the **Inventory Source Flag**. Select the **Done** button.



c. SWIFT returns you to the *Checkout* page. Repeat the above steps for each line on the requisition.

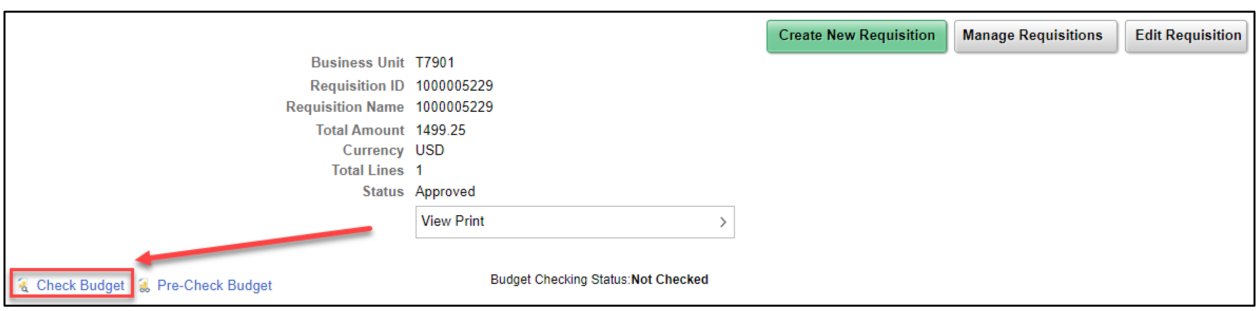
d. Scroll to the top of the page and select the **Submit** button.



4. SWIFT brings you to a confirmation page.

   a. SWIFT saves the requisition and populates the *Requisition ID*.

   b. Scroll to the bottom of the page and select the *Check Budget* link.



- The *Budget Checking Status* will show as “Valid” on the bottom of the page if the budget check is successful.
- If the *Budget Checking Status* shows “Error,” select the **Edit Requisition** button to return to the requisition. Correct the errors and save. Then, select the **Check Budget** button to rerun the budget check.
- When the requisition is in an “Approved” *Status* and a *Budget Status* of “Valid,” SWIFT has established the pre-encumbrance. The OMR requisition is ready for further processing.

You have successfully created an Open Market Requisition with an Item ID.