

QUICK REFERENCE GUIDE

Updated November 1, 2019

Create an Open Market Requisition with an Item ID

A requisition is an internal document that agencies use to request a purchase. Enter requisitions in SWIFT's EProcurement module. SWIFT creates a pre-encumbrance through the budget check process in EProcurement. Requisitions are not dispatched to Suppliers.

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. They are further processed through a Strategic Sourcing Event by Minnesota's Office of State Procurement or the agency. The agency processes these events if there is Authority for Local Purchase. The solicitation process results in a purchase order.

Currently, few agencies use the catalog features in EProcurement that require an Item ID (e.g., Departments of Health, Employment and Economic Development, Transportation, etc.).

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 record
- 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'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
- Phone: 651-201-8100, option 2

Step 2: Create the requisition record

Once the SWIFT team updates the *Item ID*, you can create an Open Market Requisition using the *Item ID*.

1. Navigate to the **Requisitions Settings** page in the EProcurement module.

Navigation Options	Navigation Path
Navigation Collection	Procurement, EProcurement, Requisitions, Create Requisition, Add a New Value.

2. This opens the **Requisitions Settings** page. Specify the requisition name, requester and other information that applies to the entire requisition. Adding information here carries throughout the requisition (e.g., *ChartFields* or *Ship To*).

Fields on the Requisitions Settings page

Field	Field Description
Business Unit	Validate the default or enter a business unit.
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 not completed, the Requisition ID becomes the Requisition Name.
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.
Doc Type	OMR

Requisition Settings

Business Unit: H1201 | Health Department | Origin: 685 | Public Health Laboratory Mgmt | Requisition Name: lab | Priority: Medium

*Requester: Employee ID | Cunningham McComb, Shelia M

*Currency: USD | Doc Type: OMR | Agency Reference: lab | Billing Location: H12LAB0000

Suggested Vendors | Custom Fields

Step 3: Validate or update defaults as needed

On the **Default Options** section, you can enter shipping and accounting information.

- 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 and the same shipping and accounting information.

1. Line Defaults section:

Use this section to change or add field values to the entire requisition. As you add items to this requisition, the values of this group box are applied to the new requisition line based on your default option. The **Default Options Group** box determines how the field values are applied.

You can set the defaults for *Supplier, Supplier Location, Buyer, Category* and *Unit of Measure*.

2. Shipping Defaults/Distribution Defaults sections:

- On the **Shipping Defaults** section, you can set the defaults for *Ship To, Due Date* and *Attention* fields.
- There is also an **Add One Time Address** link.

IMPORTANT! The *Ship To* value is required for a requisition. If you do not enter it here, you cannot process the requisition.

- SWIFT does not use the **Distribution Defaults** section.

3. Accounting Defaults section:

ChartField values are required on requisitions. Enter them on the **Chartfields 1** tab if you want them carried throughout the requisition. You can also add the *Details* and *Asset Information* as needed by your agency.

4. After you complete the defaults sections, scroll to the bottom of the page and select the **OK** button.

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.

Line Defaults ?

Supplier Category 25101507

Supplier Location Unit of Measure EA

Buyer 01087463

Shipping Defaults

Ship To G104THFL00 [Add One Time Address](#)

Due Date Attention

Distribution Defaults

Accounting Tag

Accounting Defaults

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Chartfields1 Details Asset Information

Dist	Percent	Location	GL Unit	Fund	Fin DeptID	Appropriation ID (CF3)	Account	Sub Acct	SW Cost	Agency Cost 1 (CF1)	Agency Cost 2 (CF2)	PC
1		G104THFL00	MN001	2001	G1031200	G100060	470602					

Step 4: Enter the requisition item(s)

SWIFT displays the **Create Requisition** page. On the **Browse Catalogs** section, select the link that applies to your agency (e.g., DEED Item Catalog, MDH Furniture Catalog, MDH Lab Catalog).

Create Requisition ?

Welcome Cunningham McComb, Shelia M [Home](#) [My Preferences](#) [Requisition Settings](#) | [0 Lines](#) [Checkout](#)

Request Options Search All [Search](#) [Advanced Search](#)

Enter search criteria or select from the menu on the right to begin creating your requisition.

[Catalog](#)
Browse Catalogs
MDH Lab Catalog

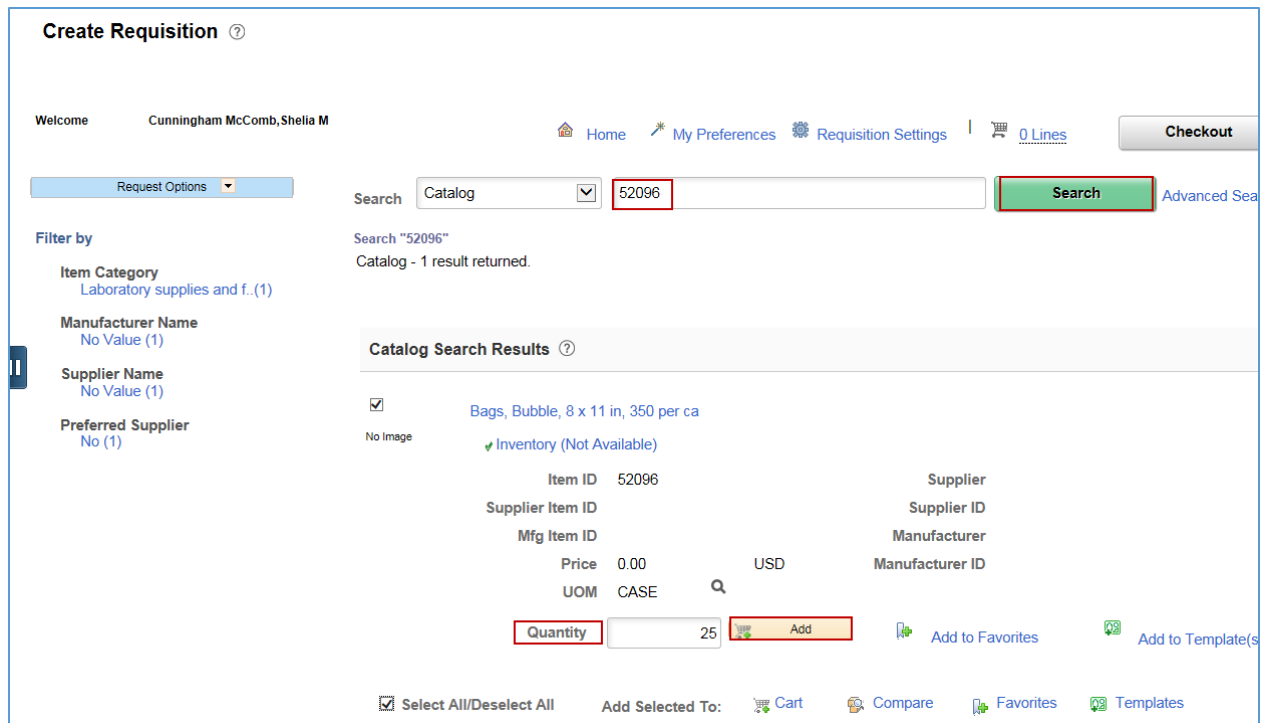
[Special Requests](#)
Create a non-catalog request

[Favorites](#)
Browse Favorite Items and Services

SWIFT opens up the catalog you selected.

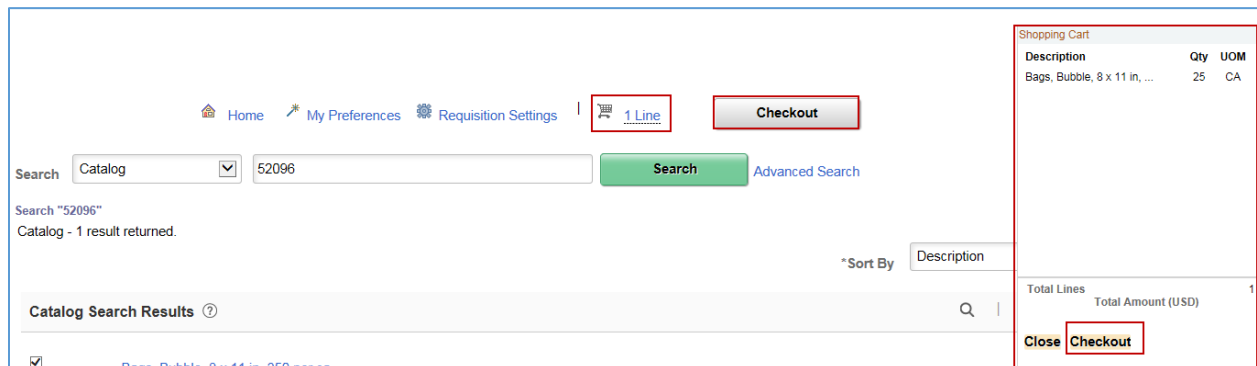
- Enter the *Item ID* into the **Search** area and select the **Search** box.

SWIFT displays the **Catalog Search Results** section with the *Item ID* you selected. Enter the *Quantity* and select the **Add** button.



At the top of the page, SWIFT updates the **Create Requisition** page to show that you added a line.

- If you select the **Shopping Cart** icon, SWIFT will open up the **Shopping Cart** window with the items that you added.



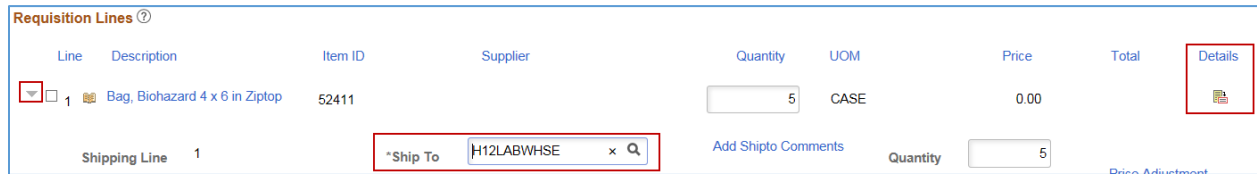
- If you wish to add more items to the OMR, enter another *Item ID* in the **Search** area and select the **Search** button.
- SWIFT updates the top of the page every time you add to your cart. You can see the number of lines entered.
- When you have completed all of the lines, select the **Checkout** button. It is located on the top, right of the page.

Step 5: Process the requisition

1. Review the requisition.

SWIFT displays the **Checkout- Review and Submit** page. Review the header, lines and defaults. Make any changes as needed.

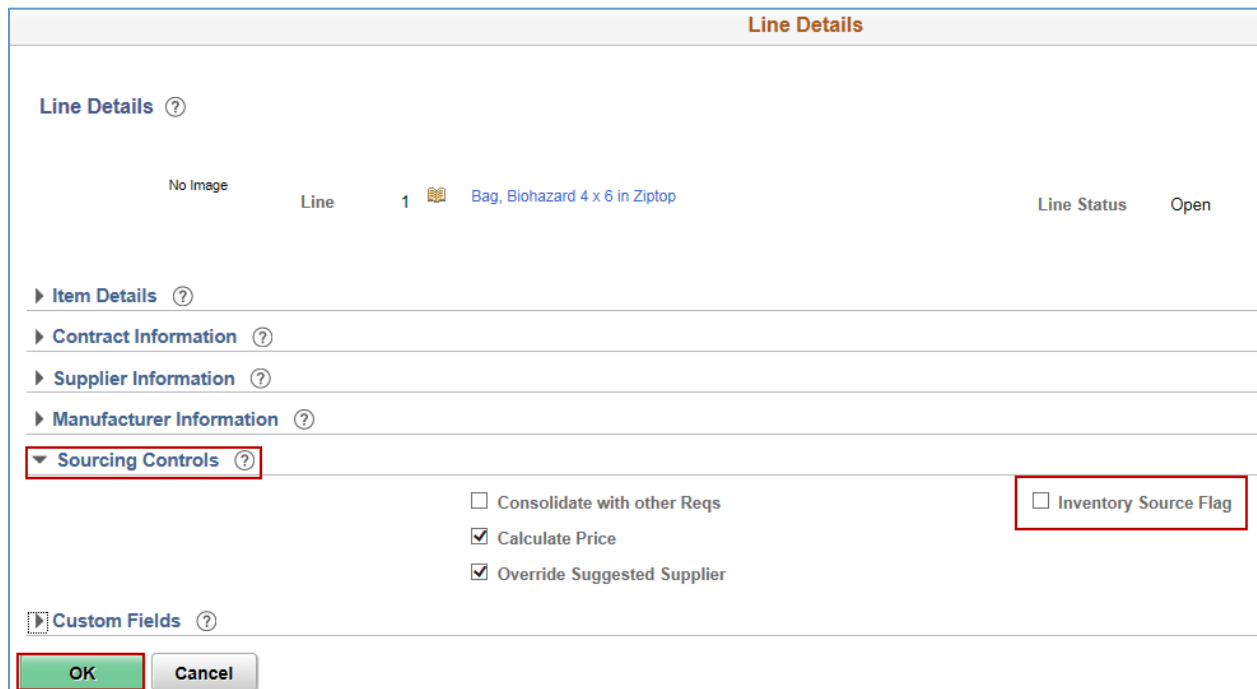
- On the *Requisition Lines* section, select the **Expand** icon to open the line.



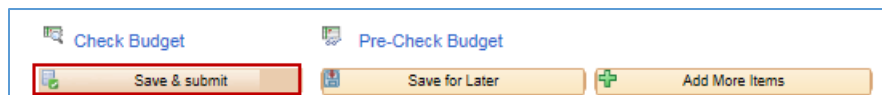
- Make sure to select the appropriate *Ship To* for the Inventory Center.
- Select the **Line Detail** icon to open up the **Sourcing Controls**. This icon is located on the far right of the requisition lines section.

SWIFT displays the **Line Details** page for that line.

- On the **Line Details** page, open up the **Sourcing Controls** section. Uncheck the **Inventory Source Flag**. Select the **OK** button.



- SWIFT returns you to the **Checkout- Review and Submit** page. Repeat the above steps for each line on the requisition.
- Scroll to the bottom of the page and select the **Save and submit** button.







SWIFT STATEWIDE INTEGRATED FINANCIAL TOOLS

2. Budget check the requisition.
 - SWIFT displays a **Confirmation** page displaying the *Requisition ID*. Scroll to the bottom of the page and select the **Check Budget** link.



Confirmation




Your requisition has been submitted.

Requested For	Cunningham McComb,Shelia M	Number of Lines	1
Requisition Name	lab	Total Amount	0.00 USD
Requisition ID	1000016356		
Business Unit	H1201		
Status	Approved		
Priority	Medium		
Budget Status	Not Checked		

 [View printable version](#)  [Edit This Requisition](#)  [Check Budget](#)  [Pre-Check Budget](#)

- 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.

 [Check Budget](#)  [Pre-Check Budget](#) Budget Checking Status: **Error**

 [Save & submit](#)  [Save for Later](#)  [Add More Items](#)

3. When the requisition is in an “Approved” *Status* and a *Budget Status* of “Valid”, SWIFT creates the pre-encumbrance. The CEO requisition is ready for further processing.

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