QUICK REFERENCE GUIDE

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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
- 1 | Page-Quick Reference Guide

SWIFT STATEWIDE INTEGRATED FINANCIAL TOOLS

- 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

				Requisition Defa	ults		
Welcome to the Admin	istrative Portal,	Sign Out					
Cancel							
✓ Header Defaults							
Business Unit	T7901 C	L	*Origin	004	Q Finance	Requisition Name	
Requester	c	L.	*Document Type	OMR	Q		
			Agency Reference				
Priority	Medium 🗸		*Billing Location	打790140100	Q		
Currency	USD C	L					

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.

Supplier ID	Q	Category	Q
Supplier Location	Q	Unit of Measure	Q
*Buyer	Q		

2 | Page-Quick Reference Guide

SWIFT STATEWIDE INTEGRATED FINANCIAL TOOLS

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.

 Shipping Defaults 				
	*Ship To	T790706000 Q	Attention	
		Add One Time Address		
	Due Date			

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

Distribution Defaults											
	Accounting Tag		Q								
Chartfields1	Details Ass	set Information Show All]								
Distribution Line ◇ Perce	ent 🌣	*Location \diamond	G	iL Unit 🗘		Fund \diamond	Fin DeptID 🛇	Appropriation ID (CF3) ♦		*Account \diamond	
1 0		T790706000	Q	MN001	۹	Q	Q		۹		Q

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.

			Create Requisition	
ND Welcome to the Administrative Port	al . <u>Sign Out</u>			
		Catalog 🗸	search	Q Advanced Search
			Requisition Defaults	
🚱 Web Suppliers	Catalog			
P Special Requests	MNDOT Item Catalog			
Catalog				

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.

SWIFT STATEWIDE INTEGRATED FINANCIAL TOOLS

С		50028	Q	
	Advanced Se	arch Requisition Defau	lts	
Search Results				
👚 ePro Home				
Items				Items 1 through 1 of 1
E Compare				$\uparrow\downarrow$
50028	E	99.95 АСН -₩ Add to Cart	Supplier ID Supplier Item ID Manufacturer ID BLACK CAT BLADES Manufacturer BLACK CAT BLADES Mfg Item ID JOMA 683158PLH	/

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.

Shopping Cart 1 item(s) to buy now. Requisition Summary			Co	ntinue Shopp	ing Upd	ate Cart	Checkout
Business Unit Requisition Name Requester Currency	Enter a requisition name 00816111						1 row
Item Description ♢		Price 🗘	Currency \diamondsuit	Quantity	Unit of Measure ♢		
Bumper, Curb, Steel, Bolt-On, 6 ft x 7/8 in, Left, Joma		99.95	USD	15	EA	٩	Delete
Total	1499 25 USD						

- 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.

- F	▼ Requisition Lines							
								1 row
Ũ	Delete Sele	cted 💽 Mas	s Change					
	Line 🗘		Item Description ♦	Quantity ◇	Unit of Measure ♢	Price 🗘	Currency 🗘	Total 🗘
	1		Bumper, Curb, Steel, Bolt-On, 6 ft x 7/8 in, Left, Joma	15	EA Q	99.95	USD	1499.25 USD 📷 📀 >

- 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.

SWIFT STATEWIDE INTEGRATED FINANCIAL TOOLS

Cancel	Line Details	Done
Item Details	Line 1 - Bumper, Curb, Steel, Bolt-On, 6 ft x 7/8 in, Left, Joma	-
Attributes		
Catalog Item Inventory (238 available) Item Additional Information		
Contract Information		
Supplier Information		
Manufacturer Information		
Procurement Group Information		
✓ Sourcing Controls		
Consolidate with other Reqs	No Inventory Source Flag	No
Calculate Price	Yes Auto Item Substitution	Yes
Override Suggested Supplier	Yes	

- 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.

	Create Requisition	<u>ନ</u> ପ୍	
Welcome to the Administrative Portal	Sign Out		
		Continue Shopping Save Subm	it
Checkout			

- 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.

			Create New Requisition	Manage Requisitions	Edit Requisition
Business Unit	T7901				
Requisition ID	100005229				
Requisition Name	100005229				
Total Amount	1499.25				
Currency					
Total Lines	1				
Status	Approved				
	View Print	•			
🔞 Check Budget 😸 Pre-Check Budget	Budget Checking Status:Not Checked				

- 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.

5 | Page-Quick Reference Guide