QUICK REFERENCE GUIDE

Updated November 1, 2019

Create an Open Market Requisition (OMR)

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.

This reference guide describes the steps to create and process an Open Market Requisition (OMR) requisition.

Steps to complete

- Step 1: Create the requisition record
- Step 2: Validate or update defaults as needed
- Step 3: Enter the requisition item(s)
- Step 4: Process the requisition

Steps to create and process an Open Market Requisition

Step 1: Create the requisition record

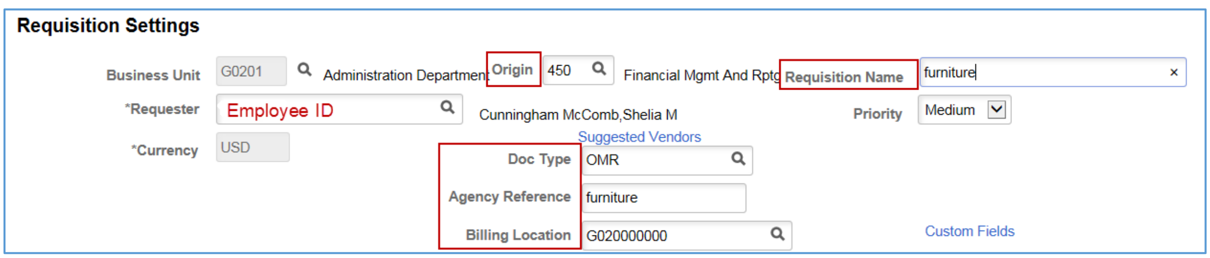
1. Navigate to the **Create Requisitions** page in the EProcurement module.

Navigation Options	Navigation Path
Navigation Collection	Procurement, EProcurement, Requisitions, Create Requisitions page defaults.

2. Enter your *Business Unit* and select **Add**.
3. On 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 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.
Doc Type	OMR



Step 2: Validate or update defaults as needed

1. **Default Options section**:

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.

2. **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*. However, these fields are not required.

3. **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.

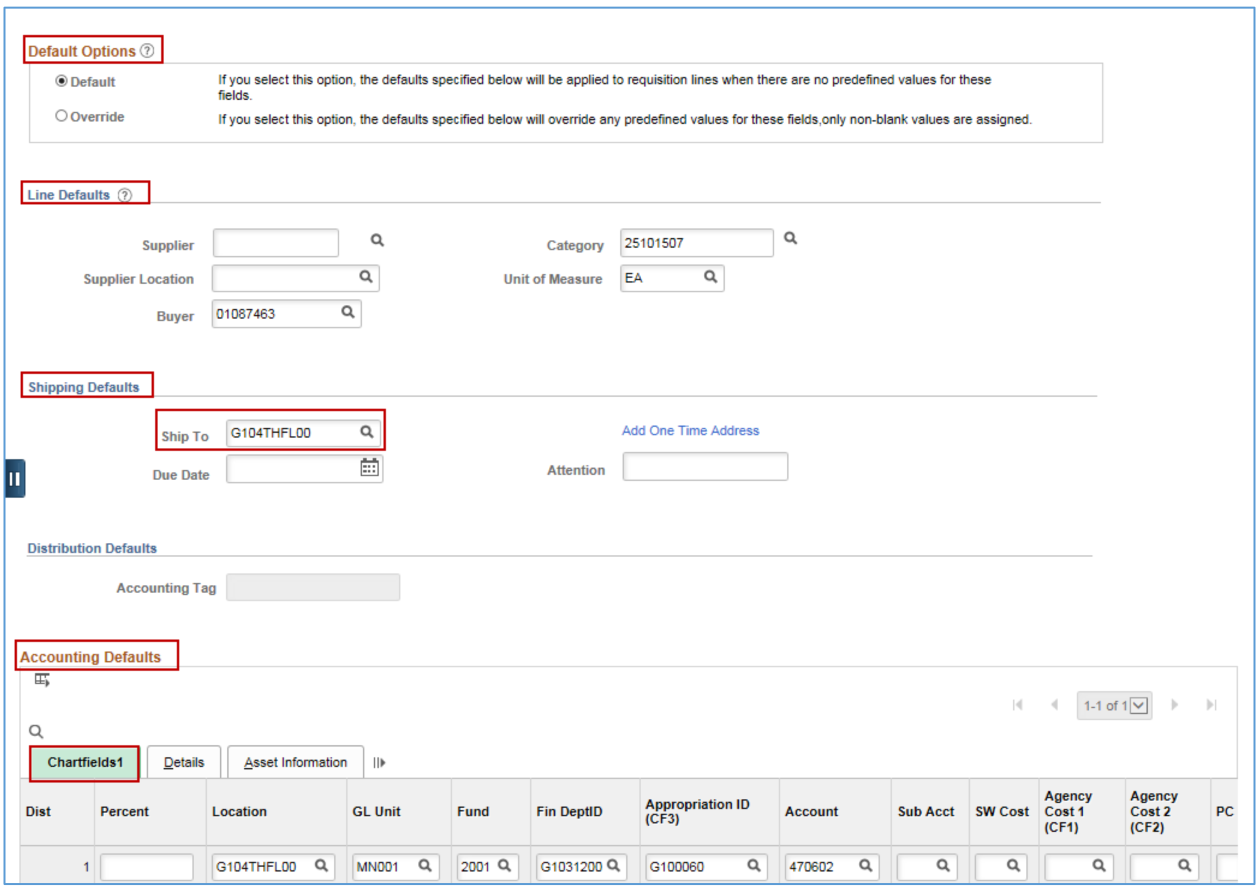
IMPORTANT! The *Ship To* value is required for a requisition. If you do not enter it here, you cannot process the requisition.

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

4. **Accounting Defaults section**:

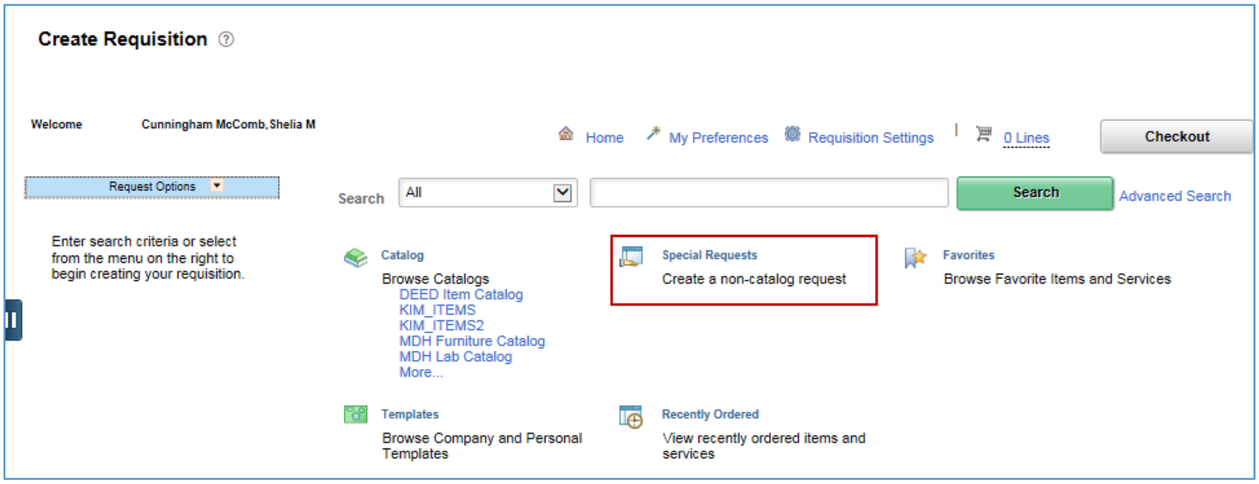
ChartField values are required on requisitions. Enter them on the **Chartfields 1** tab if you want them carried throughout the requisition. You can also add the *Details* and *Asset Information* as needed by your agency.

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



Step 3: Enter the requisition item(s)

1. SWIFT displays the **Create Requisition** page. Select the **Special Requests** link for OMR requisitions.

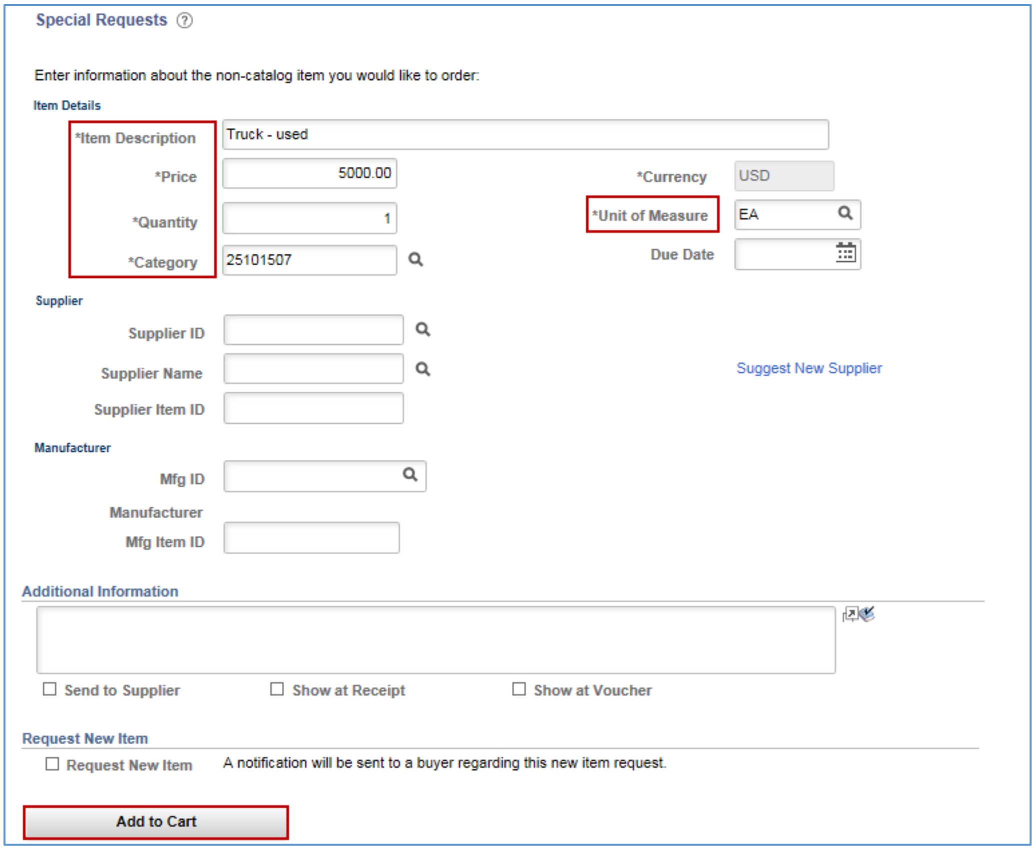


2. SWIFT displays the **Special Requests** search.

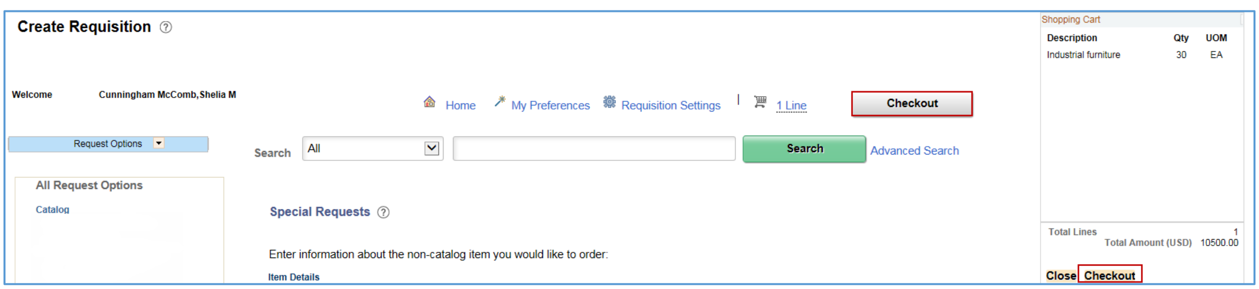
- Enter the values in the required fields for the desired item. You can also enter information in other fields as needed.
  - Item Description
  - Price
  - Quantity
  - Category
  - Unit of Measure

NOTE: If you are adding an Item from the SWIFT Catalog, please refer to the Create an Open Market Requisition with an Item ID Reference Guide.

- You can add more lines on this page by selecting the Add More Lines icon (e.g., green plus sign) on the top, right of the page. Follow the instructions in Step 3 of this guide.
- When you are done, scroll to the bottom of the page and select the **Add to Cart** button.



- SWIFT updates the top of the page every time you add to your cart. You can see the number of lines entered.
- If you press the **Shopping Cart** icon, SWIFT opens up the top right of the page with the items you entered.

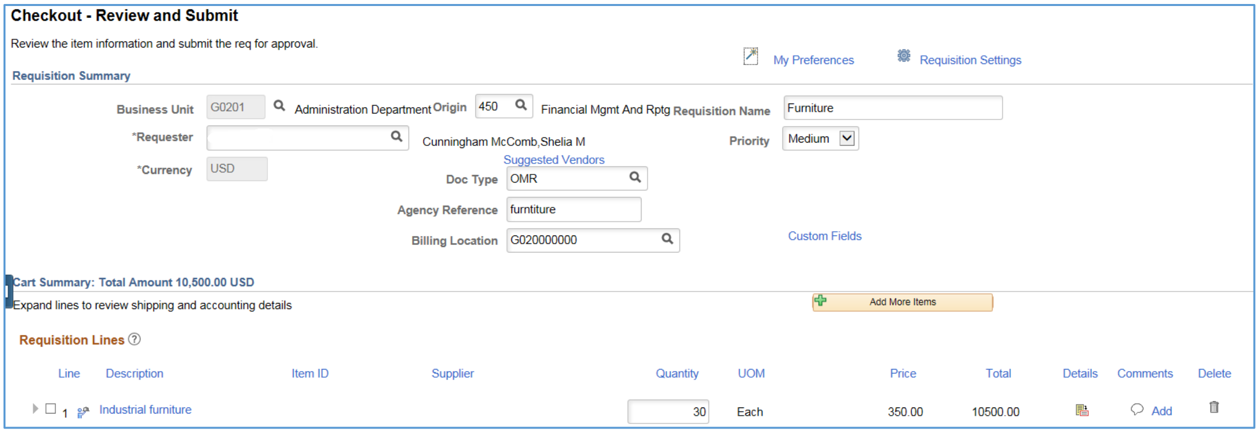


3. When you have completed all of the lines, select the **Checkout** button. It is located on the top, right of the page.

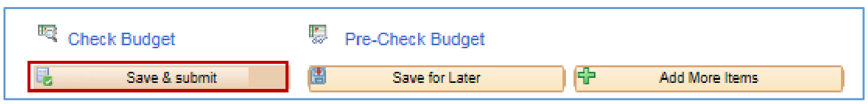
Step 4: Process the requisition

1. Review and submit the requisition.

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

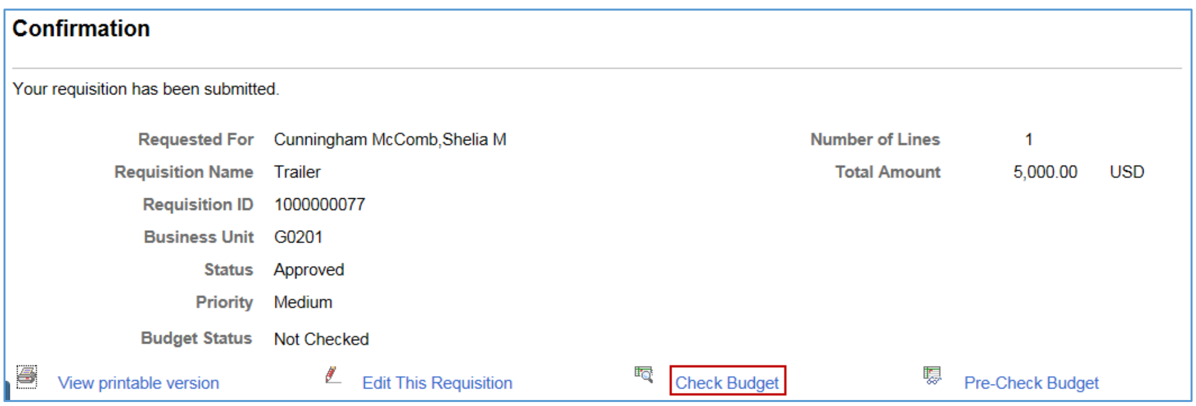


- Scroll to the bottom of the page and select the **Save and submit** button.

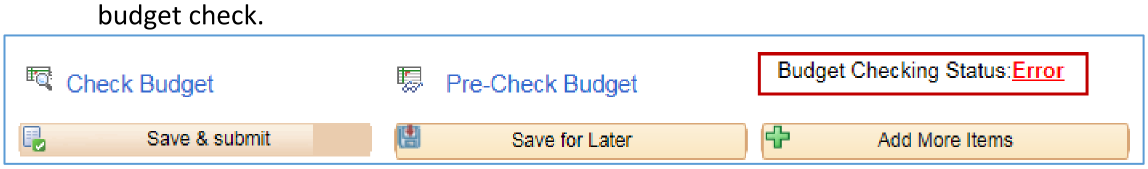


2. Budget check the requisition.

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



- 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 again select the **Check Budget** button to run budget check.



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

You have successfully created an Open Market Requisition.