

Employee Job Aid

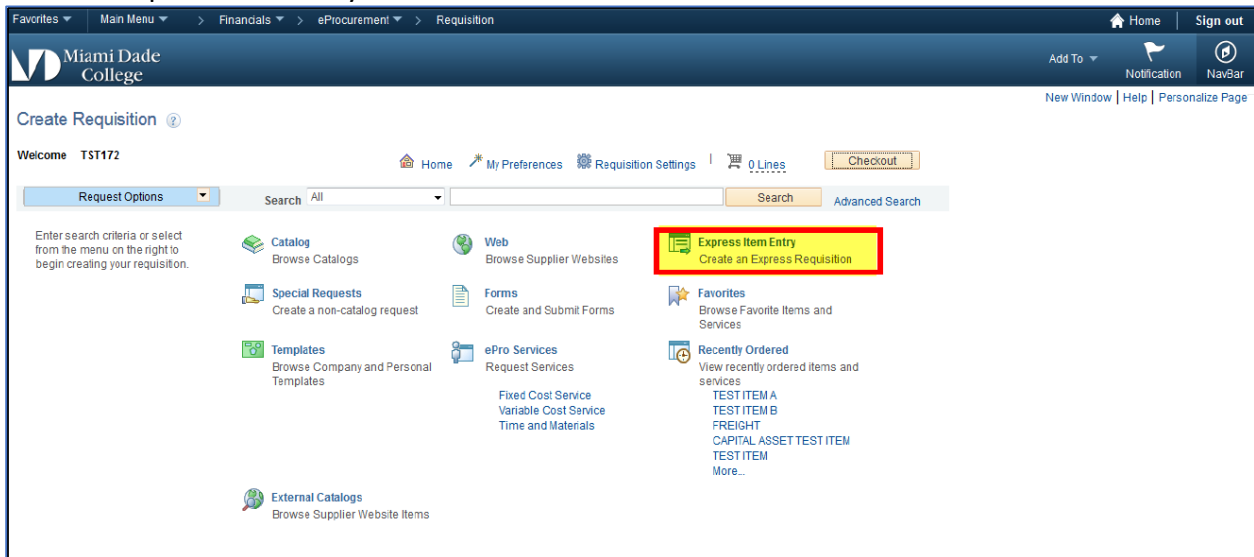
Create a Requisition – Amount Only

Creating a Requisition – Amount Only

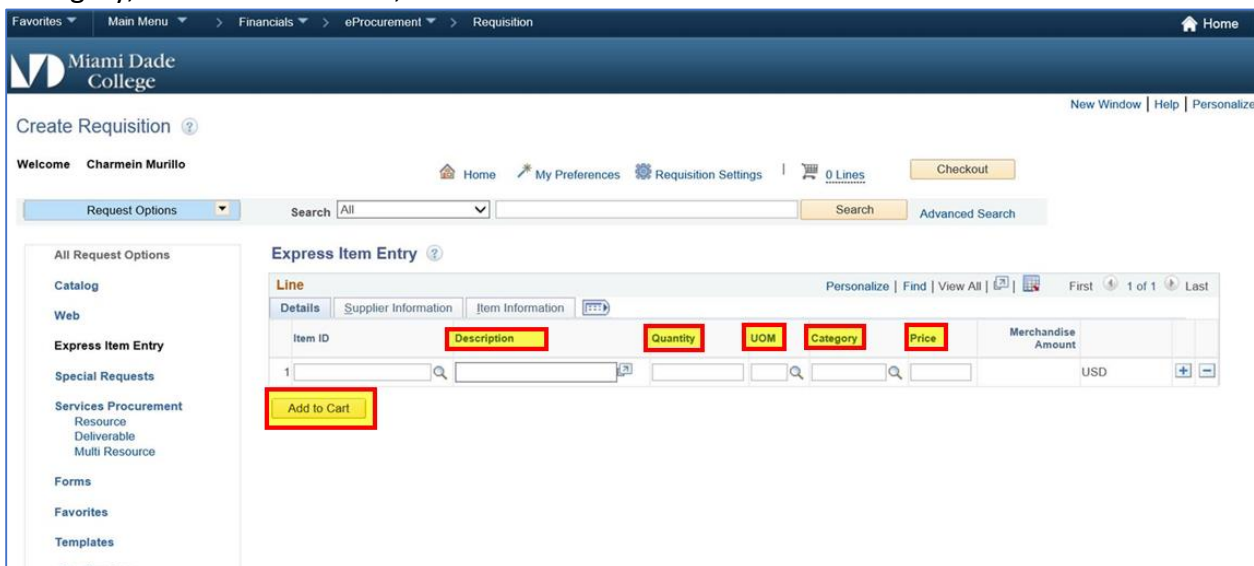
Employees can create a requisition via eProcurement. The specific changes for an “amount only” requisition are found in the “checkout” section of this document.

Navigate to: Main Menu-> Financials-> eProcurement-> Requisition

Click on Express Item Entry



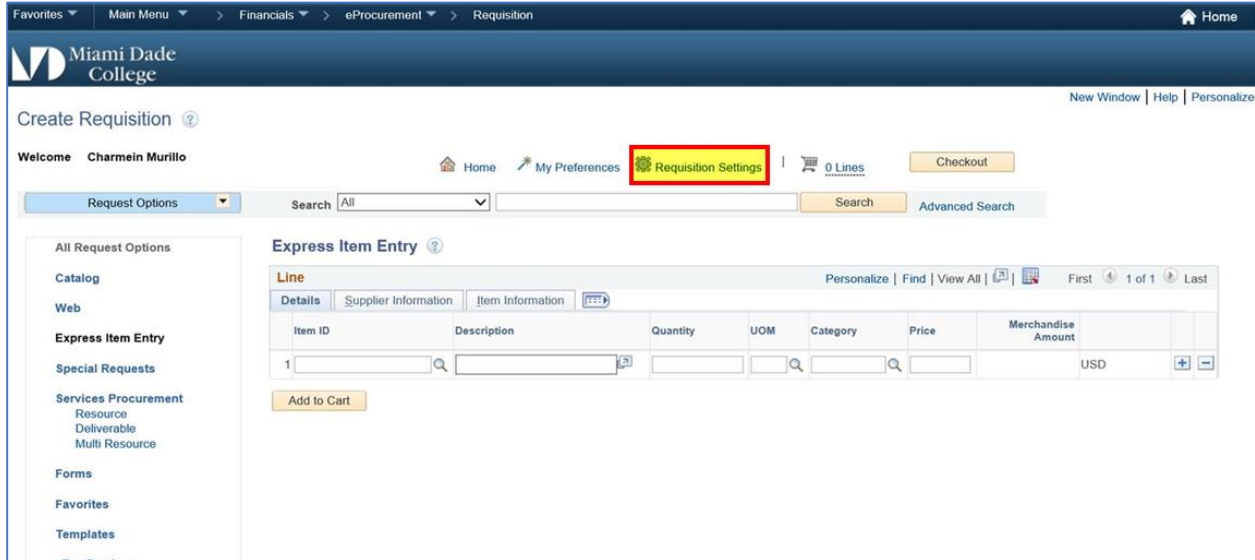
Enter your line item details as follows: Enter a Description, the Quantity, the UOM, the Category, and the Price. Then, click Add to Cart.



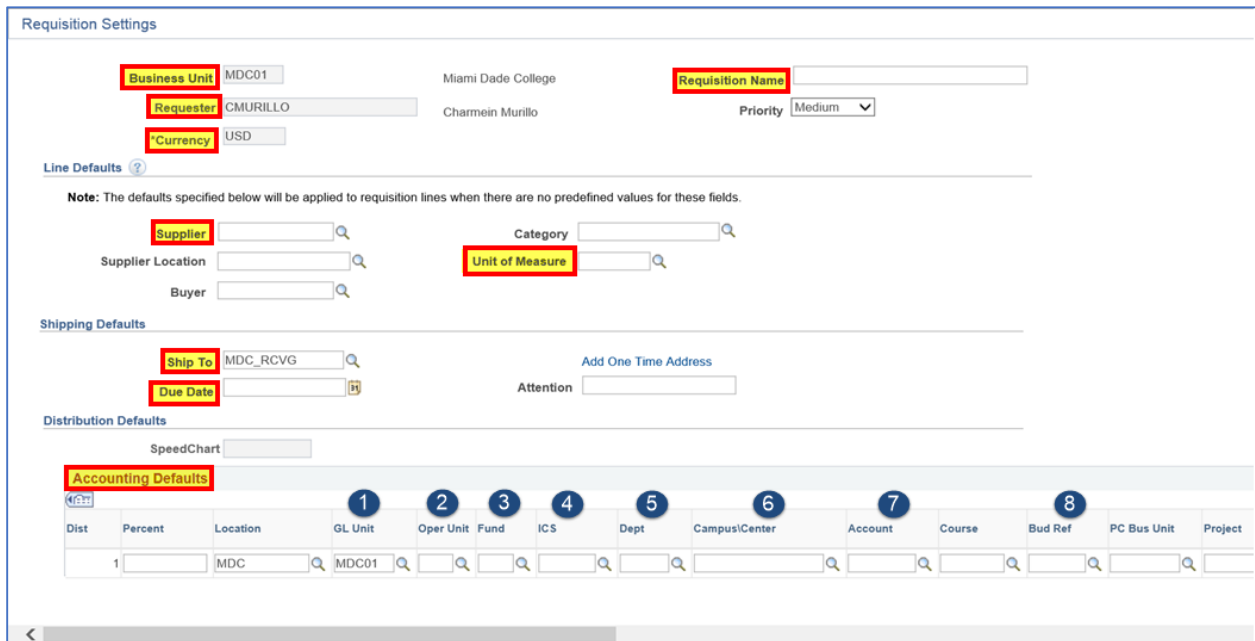
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Click on the Requisition Settings Link.



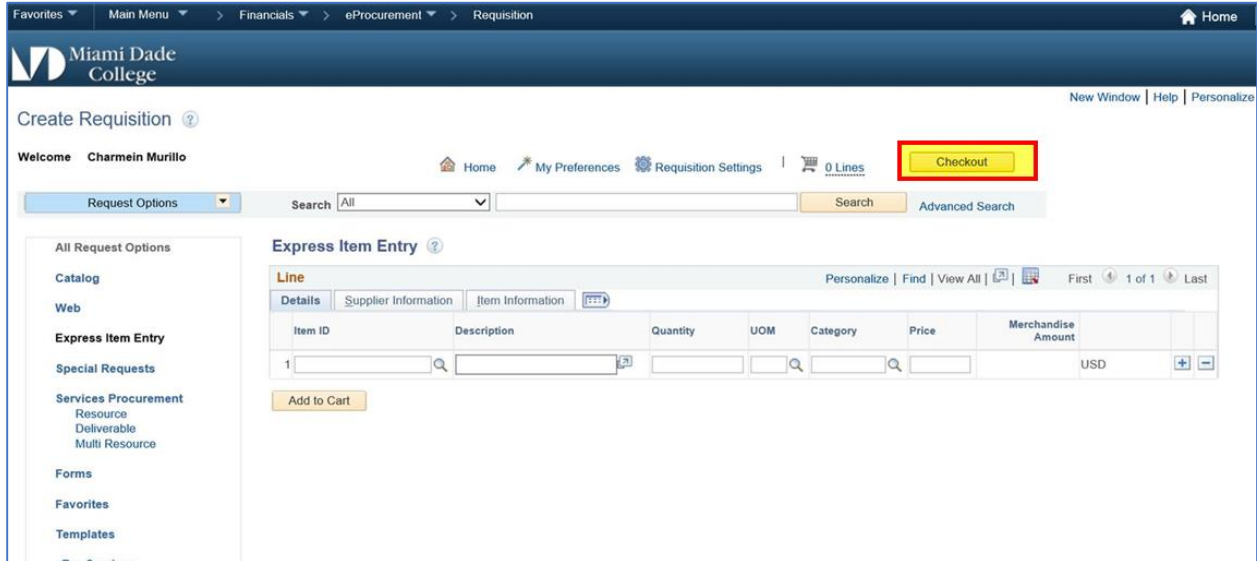
The Business Unit, Requestor, Currency, Ship To, and some Accounting Chartfield information will default. Enter a Requisition Name otherwise it will default to the requisition ID. Select a Supplier with the appropriate Supplier ID. Then, select a Due Date. Lastly, in the Accounting Details box, select your correct chartfield information, including the (1) GL Unit, (2) Oper Unit, (3) Fund, (4) ICS, (5) Dept, (6) Campus/Center, (7) Account, and (8) Bud Ref. Click OK.



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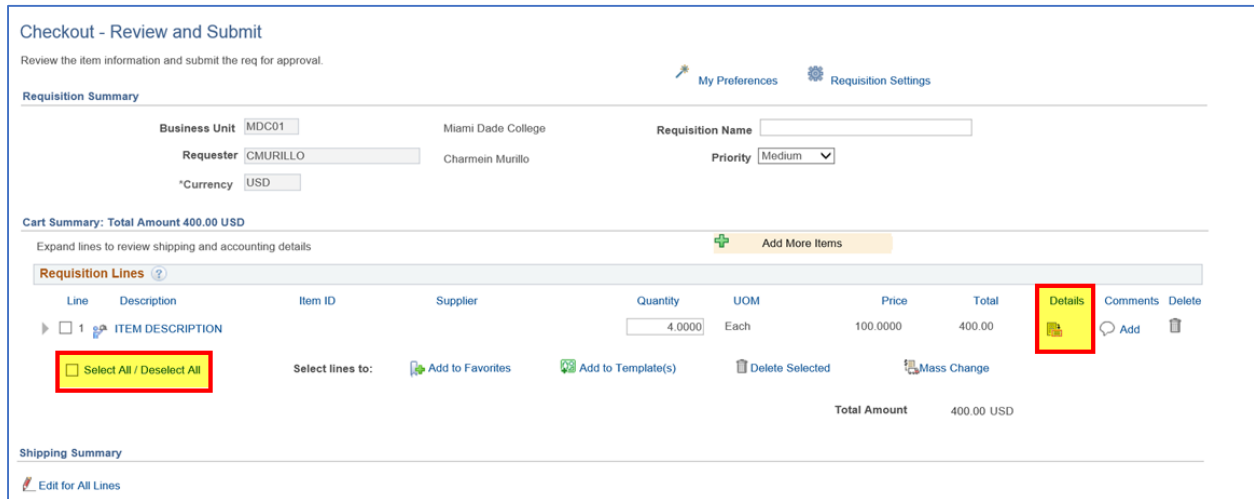
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Then, select Checkout.



The screenshot shows the 'Create Requisition' interface. At the top right, a yellow 'Checkout' button is highlighted with a red rectangular box. The page includes a navigation menu on the left, a search bar, and a main area for 'Express Item Entry' with a table for adding items to the cart.

Select All Distribution Lines. Then, select the Details Link to select the Amount Only checkbox.



The screenshot shows the 'Checkout - Review and Submit' page. A table of 'Requisition Lines' is displayed. The 'Details' link for the first line is highlighted with a red box. Below the table, a 'Select All / Deselect All' checkbox is also highlighted with a red box. The table shows one line with a quantity of 4,000 and a total amount of 400.00 USD.

Line	Description	Item ID	Supplier	Quantity	UOM	Price	Total	Details	Comments	Delete
1	ITEM DESCRIPTION			4,000	Each	100.0000	400.00	Details	Add	Delete
							Total Amount	400.00 USD		

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Select the Amount Only Checkbox to make this an Amount Only requisition.

The screenshot shows the 'Line Details' window for a requisition. The 'Item Details' section contains the following information:

- Merchandise Amount: 400.00 USD
- Item ID: [Blank]
- Category: 10101700
- Original Substituted Item Description: [Blank]
- Physical Nature: Goods (dropdown menu)
- Buyer: [Blank]

On the right side of the 'Item Details' section, there are several checkboxes:

- RFQ Required
- Device Tracking
- Zero Price Indicator
- Amount Only (highlighted with a red box)
- Inspection Required

The 'Contract Information' section at the bottom includes:

- Use Contract if Available
- Contract ID: [Blank]

Enter comments to be viewed by the Supplier, Buyer, Receiver, and Accounts Payable (Voucher). Enter information for the approver to see here when they approve the requisition. The Pre-Check Budget Link will show if you have sufficient funds to make the requisition. Then, click on Check Budget, which encumbers the funds for the requisition. Lastly, click Save and Submit.

The screenshot shows the bottom portion of the requisition form. The 'Requisition Comments' section has a text area with a yellow highlight. Below it are three checkboxes:

- Send to Supplier
- Show at Receipt
- Shown at Voucher

The 'Approval Justification' section has a text area for justification. At the bottom, there are several action buttons:

- Check Budget (highlighted with a red box)
- Pre-Check Budget (highlighted with a red box)
- Save & submit (highlighted with a red box)
- Save for Later
- Add More Items
- Preview Approvals
- Add Request Document

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The Confirmation screen will populate after submitting. Here you will see your Requisition ID and the Status of your requisition. Also, all Approvers who are in queue.

The screenshot displays the 'Confirmation' page in the eProcurement system. The page header includes the Miami Dade College logo and navigation links. The main content area shows the following details:

Requested For	TST172	Number of Lines	1
Requisition Name	ePro Example	Total Amount	15.00 USD
Requisition ID	000000009		
Status	Pending		
Priority	Medium		
Budget Status	Not Checked		

Below the details, there are action buttons: View printable version, Edit This Requisition, Check Budget, and Pre-Check Budget.

The 'Requisition Approval' section shows a table with one entry:

Requisition Approval
Pending
Approver - TINA WOOD MDC Requisition Approver 1

An 'Apply Approval Changes' button is located at the bottom of the approval section.