

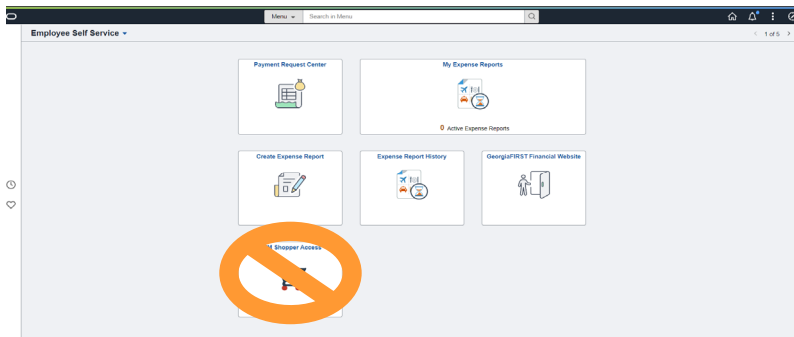


HOW TO

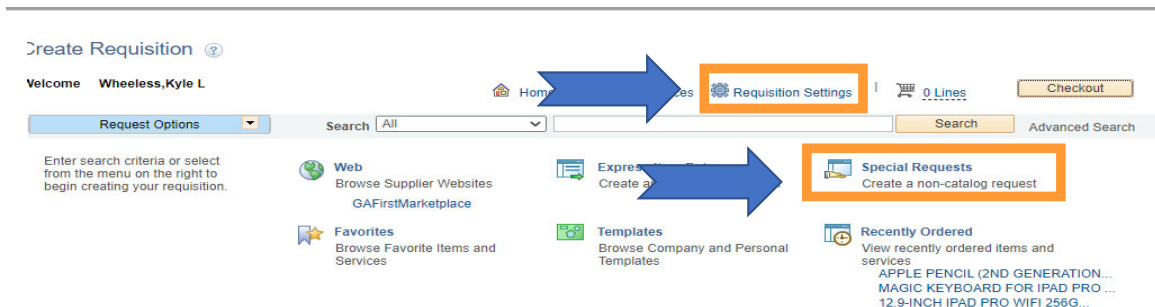
Create a Special Request Requisition


This job aid will go through the steps on how to create a Special Requisition. Special Requisitions are created to purchase items not found on the GeorgiaFIRST Marketplace, and the Office of Procurement's buyer team members handle these purchases. If you have not checked if the items you would like to purchase are on the marketplace, please review the *How to Purchase Items via the GeorgiaFIRST Marketplace* job aid.

1. Log in to PeopleSoft via <https://www.usg.edu/gafirst-fin/> by clicking GeorgiaFIRST Financials under Core Users on the right of the page. You will be prompted to log in using Duo.
2. Click the compass icon at the top right of the page. This opens the NavBar menu.
 - a. NOTE: Do not click the *GFM Shopper Access* tile to get to the marketplace. It routes you through "Window Shopper" mode, through which you will not be able to complete your order.



3. On the NavBar menu, click Navigator > eProcurement > Requisition.
4. On the new page, click Special Requests.
 - a. **TO NOTE:** Requisition Settings can be used to enter default settings/data; a timesaving option when creating multi-line requisitions. To do so, click the link **prior** to selecting Special Request. Please only use this function for the **Supplier, Unit of Measure and Category Code**. These fields will populate as the default information on every line of your requisition.



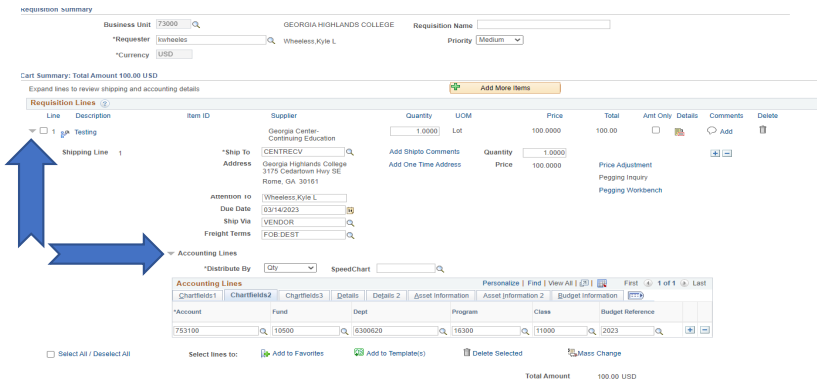
5. If you did not use Requisition Settings, complete the steps below for each line/item you need to enter – including credit lines and shipping/freight:
 - a. Enter an Item Description.
 - b. Enter the Price of the item.
 - c. Enter the Quantity requested.
 - d. Enter or select the Unit of Measure (most common is EA and JOB).
 - e. Enter the NIGP/Category code in the Category field (It is not recommended to use the search function for this field).
 - f. Enter the Supplier ID or the Supplier Name.
 - g. If you have any information associated with the line, enter it in the Additional Information  **0 Lines**
 - h. Check the Show at Receipt and Show at Voucher checkboxes.
 - i. Select the Add to Cart button.
 - j. The following fields will remain Blank: Due Date, Supplier Item ID, Mfg ID, and Mfg Item ID

6. Confirm the Shopping Cart updated with your requisition line(s) in the upper right corner.
7. Select the Checkout button located beside the Shopping Cart.
8. Enter a name for your requisition in the Requisition Name field.
9. You can update the distribution/accounting information, using one of two methods below (**Individual Lines or Multiple Lines**) :
 - NOTE:** a. When using either option for accounting allocation changes:
 - i. If you use the SpeedChart function, you must populate the BudRef field on the Chartfields 2 tab. If you manually enter the allocation, you must first populate the GL Unit field on the Chartfields 1 tab in addition to populating the BudRef on the Chartfields 2 tab.
 - ii.

SPECIAL NOTE for UITS related CAPITAL Purchases

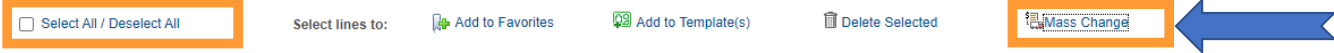
To Update Accounting Allocation on Individual lines:

Click the **Expand** buttons (triangles) and make necessary updates for each line.

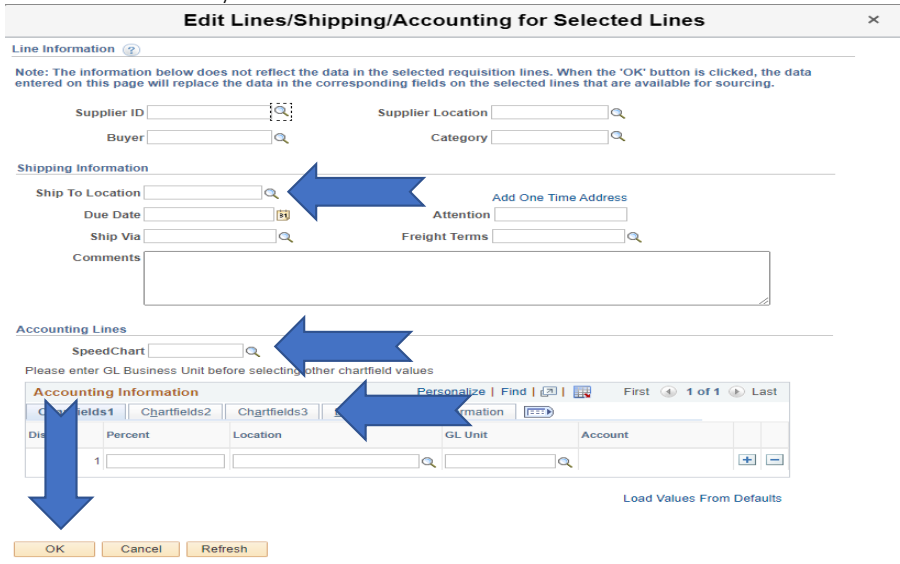


To Update Accounting Allocation on Multiple lines simultaneously:

Select the line checkboxes of all the lines you need to update, then select the Mass Change link



- Update the accounting allocation by populating the information in the Chartfields 1 – 3 tabs, or by using the SpeedChart field.
- Update the Ship To Location if necessary.



Click OK, and then click OK for All Distribution Lines to apply changes to all the selected lines.

10. To add supporting documentation, click on the comment bubble **or Add** at the end of the first line of your requisition; DO NOT use the "Add More

Quantity	UOM	Price	Total	Amt Only	Details	Comments	Delete
1.0000	Lot	100.0000	100.00	<input type="checkbox"/>			

11. Click **Add Attachments** and **Browse** for the saved scanned documents.
12. Once located, click on your file and click **Open**.
13. Click **Upload** and then **OK**.



14. To verify you have attached your document(s), you will be able to see a View button; and when you return to the review and submit screen, you will see a paperclip attached to the comments bubble on the line you added it to.
15. Enter the business purpose or comments in the Approval Justification field (NOTE: Do not include any slashes (this: /) in your comments)
16. Select the checkboxes for Show at Receipt and Shown at Voucher.

Requisition Comments and Attachments

Enter requisition comments

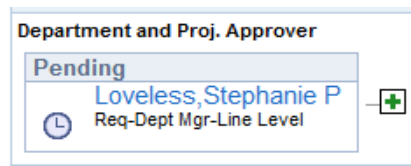
- Send to Supplier
 Show at Receipt
 Shown at Voucher

[Add more Comments and Attachments](#)

Approval Justification

Enter approval justification for this requisition

17. To insert any additional approvers (if requested or required), click **Save for Later** then the **Preview Approvals** link.
 - a. Click on a green plus sign to search for the User ID of the Approver you would like to insert, click Insert.



- b. Click the Apply Approval Changes button.

18. Click Save & Submit to submit the requisition lines into the approval workflow.

SPECIAL NOTE: Assets and Small Value Property

If the purchase is for an item that is classified as **Small Value Property** (cost including delivery and set-up is between \$3,000 and \$4,999.99), please use the following account codes:

- 743200 - General Equipment
- 743230 - Computer Equipment
- 743500 - Furniture
- 744200 - IT Equipment (NOT Computers)

If the purchase is for an item that is classified as an Asset (cost including delivery and set-up is equal to or greater than \$5,000), please use the following account codes:

- 843100 - General Equipment
- 843300 - Computer Purchases
- 843320 - Computer Hardware
- 843390 - Other IT Purchases
- 841100 - Vehicles

If you have a question regarding if an item is an asset or not, please contact Jacob Broome (jbroome@highlands.edu).