**State of Kansas**



**Creating Requisitions Using Procurement Cards**

***Statewide Management, Accounting and Reporting Tool***

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| **Date Created:** | 10/20/2015 |
| **Version:** | 1.0 |
| **Process** | Begin by navigating to the Requisition page.   1. Click the **eProcurement** link |
|  | 1. Click the **Requisition** link |
|  | 1. The **Business Unit** search field defaults based on your agency number. Depending on your security level, you can accept the default or enter a different business unit number.   For this simulation, accept the default business unit. |
|  | 1. Use the **Requester** field to enter the SMART User ID for the Requester. You MUST replace the Default Requester ID with a valid SMART User ID.   For this simulation, you need to use a **Requester** who holds a **business procurement card**. This enables you to use the Requester’s procurement card information on the requisition.  Click in the **Requester** field.    **Note**: If you do not know the Requester’s SMART User ID, use the **Lookup** button (magnifying glass) to display a list of available values. |
|  | 1. If you would like to name the requisition, enter your description in the **Requisition Name** field.     For this simulation, you will leave it blank. |
|  | 1. Use the **Prior Authorization Type** field to enter a prior authorization type as needed.     For this simulation, you will leave it blank.  **Note**: If you do not know the Prior Authorization Type code, use the **Lookup** button (magnifying glass) to display a list of availabe values. |

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|  | 1. For the State of Kansas, SMART defaults the business procurement card information into the requisition if:  * The **Requester** holds a business procurement card * The **Requisitioner** enters the (business procurement card holding) Requester’s SMART User ID in the **Requester** field when creating the requisition * The **Supplier** accepts business procurement cards as a method of payment. Supplier procurement card acceptance information is stored in the Supplier file in SMART.   If a Requester holds more than one business procurement card for the State of Kansas, use the Card Number drop-down list to choose the correct business procurement card number.  Click the **Card Number** drop-down list.    For security purposes, SMART encrypts the business procurement card number allowing the **Requisitioner** to view only the last four digits.  For this simulation, you will choose the first PCard number in the list.  Once a card is assigned, the **expiration date** will auto fill and the **“Use Procurement Card”** checkbox will be checked.    If the **Requester** for the requisition holds one or more business procurement cards for the State of Kansas, SMART automatically defaults business procurement card information on every requisition that is created using that **Requester**. If necessary, change the business procurement card number to the correct card number using the **Card Number** drop-down list.  If you are creating a requisition that should not be paid with a procurement card, simply remove the default selection in the **Use Procurement Card** check box by clicking in the check box. Deselecting the Use Procurement Card check box removes the **Requester’s** procurement card information from the Requisition.  For this simulation, you want to use a business procurement card. Therefore, you do not need to deselect the Use Procurement Card check box. |
|  | 1. Use the **Buyer** field to assign a buyer to this requisition. Buyer is required and can be entered here for all lines or can be entered on the Review & Submit page per line.     **Note**: If you do not know the Buyer ID, use the **Lookup** button (magnifying glass) to display a list of availabe values. |
|  | 1. The remaining fields on the Requisition Settings page may remain blank.   However, if your requisition is all for the same supplier and has multiple lines with one or more of the same chartfields, it may be in your best interest to fill in some additional fields before continuing.  For this simulation, you will enter the majority of information on this page. |
|  | 1. To apply the field settings you define on the remainder of the page, click the “**Override**” radio button. |
|  | 1. Use the **Supplier** field to assign a single Supplier to the entire requisition.   Supplier Location field will autopopulate once the Supplier is chosen.    For this simulation, you can use any supplier that has a contract associated to it. Grainger’s supplier ID is 0000027867 if you would like to use that.  **Note**: If you do not know the Supplier ID, use the **Lookup** button (magnifying glass) to display a list of availabe values. |
|  | 1. Use the **Category** field to assign the same Category Code on each requisition line.     For this simulation, you can choose any Category Code you would like. Category Code 10101501 is for Cats if you would like to use that.  **Note**: If you do not know the Category Code, use the **Lookup** button (magnifying glass) to display a list of available values. |
|  | 1. The **Unit of Measure** will default as EA, the user can change the UOM on the Requisition Settings page or when adding items.     For this simulation, accept the default.  **Note**: If you do not know the Unit of Measure, use the **Lookup** button (magnifying glass) to display a list of availabe values. |
|  | 1. Scroll to the bottom of the page and click the **‘OK’** button. |

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|  | 1. A **pop-up box** will appear, advising the default values associated with the entered Requester ID. Click **‘Yes’** through this message. |
|  | 1. Verify that the **Ship To** address defaulted correctly. This can be modified on the Review & Submit page.     For this simulation, accept the default. |
|  | 1. Use the **Due Date** field on this page if all lines for the requisition will have the same due date. This can be modified on the Create Requisition or Review & Submit pages.     For this simulation, enter **12/31/2015** (or the current year)  **Note**: The Due Date can be selected using the **‘Calendar’** icon. |
|  | 1. Verify that the **Chartfield** Values defaulted correctly. These values can be modified on the Review & Submit page.     For this simulation, accept the default.  **Note**: The Chartfields are now located within their own area, with their own **scrollbar**. |

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|  | 1. Use the **Asset Information** tab on this page if all lines for the requisition will have the same asset information. This can be modified on the Review & Submit page.     For this simulation, leave these fields blank.  **Note**: Is it State of Kansas business practice that any agency asset that has a value of $5000 or greater is required to use the Asset Management module in SMART. |
|  | 1. To add items or services to the requisition, scroll to the bottom and click **‘OK’**. Clicking the OK button progresses you to the Create Requisition page. |
|  | 1. For this simulation, you will use the **Special Requests** option. |
|  | 1. Use the **Item Description** field to enter the description of what you’re purchasing.   For this simulation, type in **Red Widgets.** |
|  | 1. Use the **Price** field to enter the cost of the items you’re purchasing.     For this simulation, type in **$10.00** |
|  | 1. The **Unit of Measure** field has a default value from the Requisition Settings page. If the item you’re purchasing comes in a different UOM, change it here.     For this simulation, leave the default value.  **Note**: If you do not know the Unit of Measure, use the **Lookup** button (magnifying glass) to display a list of availabe values. |
|  | 1. Use the **Quantity** field to enter the number of these items you’re requesting.     For this simulation, type in **25**. |
|  | 1. The **Category Code** field has a default value from the Requisition Settings page, if one on was entered.   If not, you will need to choose a Category Code for the requested item.  If one was entered, you can change the default Category Code for this item.    For this simulation, leave the default value.  **Note**: If you do not know the Category Code, use the **Lookup** button (magnifying glass) to display a list of availabe values. |
|  | 1. Use the **Due Date** field to enter the date you expect the requested items to be delivered.     For this simulation, leave the default value.  **Note**: The Due Date can be selected using the **‘Calendar’** icon. |
|  | 1. The **Supplier ID** and **Supplier Name** fields have a default value from the Requisition Settings page, if one was entered.   If not, you will need to enter a Supplier ID and/or Supplier Name at this time.  If one was entered, you can change the default Supplier ID and/or Supplier Name at this time.    For this simulation, leave the default value.  **Note**: If you do not know the Supplier ID or Supplier Name, use the **Lookup** button (magnifying glass) to display a list of availabe values. |
|  | 1. Scroll to the bottom of the page, and click the **Add to Cart** button. |
|  | 1. Before you proceed, take a moment to review the content of the **Shopping Cart** box located on the Right side of the screen. Clicking the **Add to Cart** button makes the box appear and list the items you just added to the purchase requisition.   Also, note that clicking the **Add to Cart** button removes the **item description, price** and **quantity** information that you entered and reverted the **Unit Of Measure, Category, Due Date, Supplier ID** and **Supplier Name** fields to their default values. |
|  | 1. Once you have added all the items to the requisition, use the **Checkout** button at the top of the page to review and submit the requisition. |
|  | 1. Use the Checkout – Review and Submit page to review and edit the requisition details, prior to saving and submitting the requisition into the SMART workflow process for approval. |
|  | 1. To change any of the default information entered on the Requisitions Settings page, click the **Requisition Settings** link on the top of the Review and Submit page.     **Note**: Any changes made on this page, will affect all of the requisition lines on the Review and Submit page. |
|  | 1. The items you added to the requisition are displayed in the **Requisition Lines** section. The Requisition Lines section includes details such as the **Description** of the items, **Quantity** of items ordered, and the **Total** amount of the purchase. |
|  | 1. Additional editing can be performed from this page. For example, you can edit line, shipping, and accounting information.   To view additional information for the item, click the **Expand Section** button.  Click the **Expand Section** button.  Clicking the **Expand Section** button displays additional information related to the requisition line, including shipping information and accounting information.  Notice thst SMART auto assigns a **Shipping Line** to the requisition line. |
|  | 1. If desired, use the **+ button** to add additional **Ship To** locations. This function allows you to split the Shipping Line (schedule) into multiple Ship To address lines.   **Note**: If you split the schedule, be sure to adjust the **Quantity** and update the Ship To locations for each schedule line.  Alternatively, if there are multiple schedule lines and you need to delete or remove a schedule line, use the **– button** to delete or remove shcedule lines as desired.  For this simulation, you do not need to split the schedule. |
|  | 1. If necessary, use the **Add One Time Address** link to navigate to the **Shipping Address** page.   Click the **Add One Time Address** link. |
|  | 1. Clicking the Add One Time Address link opens the **Shipping Address** page.   Use the Shipping Address page to update the shipping address information for the requisition line. The Shipping Address page is used to enter a shipping address that is not currently defined in SMART as a default “Ship To” location.  Use the **Shipping Address** page to make a one-time shipping address change, for example, a shipment to a construction site or other temporary location. Make the required changes to the shipping address information and click the **OK** button.  For this simulation, you do not need to modify the shipping address information. Click the **Cancel** button to return to the Review and Submit page.  Click the **Cancel** button. |
|  | 1. Use the **Accounting Lines** section, **Chartfields1**, and **Chartfields2** tabs to modify **ChartField** values as necessary. Use the Chartfields1 tab to edit default ChartField values of Location, Percent, Merchandise Amt and GL Unit. Use the Chartfield2 tab to edit default ChartField values and to enter the **Account** code for the distribution line.   If desired, use horizontal scrollbar to navigate to the far right side of the page to access additional Chartfield information and to access the buttons used for splitting or removing distribution (accounting) lines. If necessary, use the **+ button** to add additional lines to split the distribution (funding) for the requisition line. Alternatively, use the **– button** to delete or remove distribution lines as necessary.  For this simulation, you do not need to edit the ChartField information.  **Note**: The State of Kansas is not using the Details tab. |
|  | 1. If the item is to become a fixed asset item, use the **Asset Information** tab to enter asset details for the item.   **Note**: It is State of Kansas business practice that any agency with assets that have a value of $5,000.00 or greater is required to use the Asset Management module in SMART.  Click the **Asset Information** tab. |
|  | 1. Use the **AM Business Unit** field to enter an Asset Management business unit number to associate with the asset item.   **Note**: If you consider an item to be an asset, you must populate both the **AM Business Unit** field and the **Profile ID** field. Both of these fields must contain data for the information to be passed through SMART into the Asset Management module. If only one of these fields is populated, SMART will not consider the item an asset, and will not pass the asset information onto the Asset Management module.  For this simulation, you need to enter Asset Information.  Click in the **AM Business Unit** field    Enter the **AM Business Unit** number into the **AM Business Unit** field.  For this simulation, enter a valid value e.g. “**17300**” |

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|  | 1. Use the **Profile ID** field to enter the Profile ID value.   **Note**: The Profile ID sets defaults for the asset such as asset class, asset type and depreciation rules in the Asset Management Module. The Profile ID field becomes a required data entry field whenever dates are entered in the AM Business Unit field. If you enter data in the AM Business Unit field, you must also enter data in the Profile ID field. SMART will not allow you to progress forward until this is completed.  Click in the **Profile ID** field.    Enter the **Profile ID** number into the **Profile ID** field.  For this simulation, enter a valid value e.g. “**540300**”. |
|  | 1. Enter the asset Tag Number if available, into the **Tag Number** field.   **Note**: When using asset tag numbers, you need to split the lines (add additional lines) using the **+ button**. SMART allows only a **Quantity** of one on each line for which an asset tag number is being entered.  For this simulation, you do not need to enter an asset Tag Number. |
|  | 1. Next, you need to review the line detail information. Use the **Line Details** button to open the **Line Details** page.   Click the **Line Details** button    Use the **Line Details** page to edit the line details information as necessary.  To view, edit or enter contract information on the requisition, use the **Expand Section** button for the **Contract** section.    Use the **Contract ID** field to enter the Contract ID number. If you do not know the Contract ID number, use the **Lookup** button (magnifying glass) to view and select from the available list of Contract ID numbers.  For this simulation, you do not need to enter a Contract ID number.  **Note**: The State of Kansas is not using the **Contract Line** field for requisitions. Please do not enter data in the Contract Line field for a requisition.  If you edit information on the Line Details page, use the **OK** button to submit the changes.  For this simulation, you are not modifying any line detail information. Click the **Cancel** button to return to the **Review and Submit** page.  Click the **Cancel** button. |
|  | 1. Use the **Mass Change** link to add or change the Supplier ID, Buyer, Category, Contract ID, Ship To Location, ChartField information, Asset Information, or to apply the RFQ Required checkbox to any one line, multiple lines or all lines.   Click the **Mass Change** link    **Note**: Only the Requisition lines that have been Selected by checking the box to the Left of their line information , will be affected by the changes/additions completed on the Mass Change link.  For this simulation, you will not make any changes or additions on the Mass Change page, click the Cancel button to return to the Review and Submit page.  Click the **Cancel** button. |
|  | 1. Next, you need to view the Line Comments page for the requisition line. Use the **Comments button** to open the **Line Comments** page.   **Note**: The Line Comments button will appear ‘empty’ if no line comments have been entered. If Line Comments have been entered, the Line Comments button will appear with ‘lines’, indictating there is information available for review.  Click the **Comments** button.    Use the **Line Comments** page to record a comment about the requisition line item, or to communicate a comment about the line item to the supplier. Select the **Send to Supplier** check box to send the comment to the supplier.  If you enter comment information in the Comments box, click the **OK** button to save the comments to the requisition line.  For this simulation, you do not need to add comments to the requisition line.  Click the **Add Attachment** button. When you click the Add Attachment button SMART provides prompts to guide you through the file attachment process.  For information regarding Attachment policies, please go to <https://admin.ks.gov/resources/informational-circulars/informational-circulars---accounting/fy2016---accounting-info-circs> and view Info Circular 16-A-007 Attachments in SMART (October 12, 2015\_ Supersedes: 16-A-005.  For information regarding Processing Prior Authorization Requisitions, please go to <http://www.da.ks.gov/purch/11-03Circular.doc>  For this simulation, you do not need to add an attachment to the requisition line. Use the **Cancel** button to return to the **Review and Submit** page.  Click the **Cancel** button. |
|  | 1. The button used to save, preview, and submit the requisition are located at the bottom of the page. Use the right scrollbar to navigate to the bottom of the page.   Click the right scrollbar.  Budget checking in SMART is performed by a batch process. Therefore, you do not need to use the Check Budget button on the Review and Submit page of the requisition.  Click the **Save & Submit** button to save the requisition, and submit it for approval, sourcing and dispatching to the supplier.  **Note**: If you enter invalid ChartField values or ChartField combinations on the requisition, you will receive an error message when you try to save the requisition. If you receive an error message, correct the entry of ChartField values on the requisition and save the requisition.  The requisition remains editable while the requisition status is “Open” or “Pending”. When you click the Save & Submit button, SMART displays the Confirmation page to inform you that the request has been successfully saved. The **Confirmation** page provides summarized information about the request, including the requisition ID and total price.  For this simulation, you do not use the Save & Submit button. |
|  | 1. Use the **Save for Later** button to save the requisition for later use. When you click the Save for Later button, SMART will stay on the **Review & Submit** page.   **Note**: It is important to know that the **Save for Later** button does not submit the requisition into the SMART approval workflow process. Using the **Save for Later** button enables you to save the requisition for later use, without entering the requisition into the SMART workflow approval process.  Click the **Save for Later** button. |
|  | 1. **Stupendous Job!** You have successfully created a purchase requisition using a procurement card in SMART.   **End of Procedure.** |